Project Manager Introduction

The project manager allows you to manage a project which in its simplest form consists out of phases and tasks.

Version Trunk

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A project consists out of one or more phases of which each phase can have one or more tasks.

A task always has a single parentPhase.

Time registration is only done on a task level.

Estimated and actual dates are only maintained at the task level.

Assign tasks to team members; report project activities with timesheets and calendars.

For reporting they are calculated to the higher levels.

Project views are created to support this.

1. Status management

Status is managed at task level, Project and Phase statuses shown on screen are tasks status compilation.

Task statuses are :

StatusId	Status	Description
PTS_CREATED,	Created	after task creation
PTS_CREATED_UA	Unassigned	currently not used by an automatic process
PTS_CREATED_AS	Assigned	after a resource is assigned
PTS_CREATED_IP	In Progress	after a time entry is created on the task
PTS_COMPLETED .	Completed	Manually changed by button
PTS_ON_HOLD	On Hold	
PTS_CANCELLED	Cancelled	

Project or Phase is completed if all included tasks are completed (or cancelled)

2. Resources

You can describe a customer (company and contact) and who provides the task (named provider) in the resource portlet.

To be able to associate someone to a project he should have, two (or more) project roleType, first PROJECT_TEAM to appear in Party drop-down, and at least one of the PROJECT_TEAM sub-roles for the second drop-down.

Look at parameters section to have the complete project roletypes list. And go to the party profile to associate a role type to a party.

3. Parameters :

- RoleType with PROJECT_TEAM as parentTypeId, used in a lot of screens; default proposed roleTypes are :

  - CLIENT% : used to select parties which appears in Projects Parties info, client side

  - CLIENT_MANAGER : user login associated to a project with this roleType view it in ListCustomerProjects

  - CLIENT_ANALYST : same as CLIENT_MANAGER for ListCustomerProjects

  - CLIENT_BILLING : partyId which will be invoiced; same as CLIENT_MANAGER for ListCustomerProjects; appears in Company part of Project Parties info, other CLIENT% role appears in contact part

  - PROVIDER% : all parties which provide the project. In Projects Parties info, provider part, all roleType not equals to CLIENT% will appear

  - PROVIDER_MANAGER : currently no process or specific selection

  - PROVIDER_ACCOUNTING : currently no process or specific selection

  - PROVIDER_ANALYST : currently no process or specific selection

  - PROVIDER_FUNCTIONAL : currently no process or specific selection

  - PROVIDER_VALIDATOR or PROVIDER_TESTER: used to define at project level who will validate a task, used when assigning a party to a task with status not equals to "PAS_COMPLETED", if the party has not this role, all parties with this role at the project level will be added to this task.
    (this action is done by ECA, commented in default configuration, if you want it un-comment it)