# Project Manager

Version trunk

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# Chapter 1. Project Manager Introduction

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

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.

## 1.1. 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)

## 1.2. 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.

# 1.3. 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)

# Chapter 2. ProjectMgr in UI

## 2.1. Main screen.

This is the startup screen of the project manager. It will show all active projects with some statistical data.

## 2.2. My tasks

This overview outlines all tasks the user has been assigned to.

## 2.3. My Timesheets

Here the user enters the hours worked on tasks.

It also provides an overview of all timesheets the user has filled out.
It also shows the status of the timesheets.

## 2.4. Find Projects

This screen provides an overview of all projects the user is participating in.

## 2.5. Project - summary

This dashboard gives a one page overview of project details, resources, phases and task. It is also the starting point to navigate to the various sub screens related to a project.

### 2.5.1. Sub screens

Following sub screens are provided:

- Gantt chart
- Mailing List
- Phases
- Tasks
- Orders
- Resources
- Content
- Notes
- Sub projects
- Billing

### 2.5.2. Project Information

This section provides detailed information about the project, e.g. the type and scope, the description and planned and actual start and end dates and planned and actual hours

### 2.5.3. Resources

This section provides detailed information about the participants (organizations and persons) of the project. For the participating persons this section provides information regarding the role in the project and the hours registered and processed.

### 2.5.4. Sub projects

This section provides detailed information about the project that are registered as sub projects of the project.

### 2.5.5. Phases

This section provides an overview of the phases of the project, incl. status, priority, start and end date and the hours planned and registered.

### 2.5.6. Task

This section provides provides an overview of the tasks of the project, incl. status, priority, start and end date, the first assigned resource and hours planned and registered.

### 2.5.7. Notes

This section provides detailed information about notes registered with the project.

### 2.5.8. Content

This section provides an overview of content (documents and other files)registered with the project.

### 2.5.9. Orders

This section provides an overview of orders linked to the project.

## 2.6. Project - billing

This screen shows all hours registered to the various tasks in the project by all participants.

From here the Project Manager processes all time entries for further processing regarding invoicing and cost accounting.

## 2.7. Project - edit info

The Project Manager can edit various details regarding the project.

## 2.8. Project - orders

This screen provides an overview of all orders related to the project.

## 2.9. Project - phases

This screen provides an overview of the phases of the project.

The Project Manager can manage all phases in the project here, e.g. defining new phases.

## 2.10. Project - resources

This screen provides an overview of all participants in the project.

From here the Project Manager can add new resources to the project, or end the participation of existing project members.

## 2.11. Project - tasks

This screen provides an overview of all tasks associated to the project.

## 2.12. Project - Requests

This screen provides an overview of all customer request regarding projects.

## 2.13. Tasks

This screen provides an overview of all tasks in the module

## 2.14. Timesheets

This screen provides an overview of all timesheets registered with the application by all project participants.