# Project Engine

# Introduction

  

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## Login

### Starting the Application

Enter the following URL below to access the login screen. Port number needs to be specified if any other number than 80 is used:

http://server_address:port_number/ProjectEngineWebClient

To access the browser interface using secure sockets (SSL), enter the following URL:

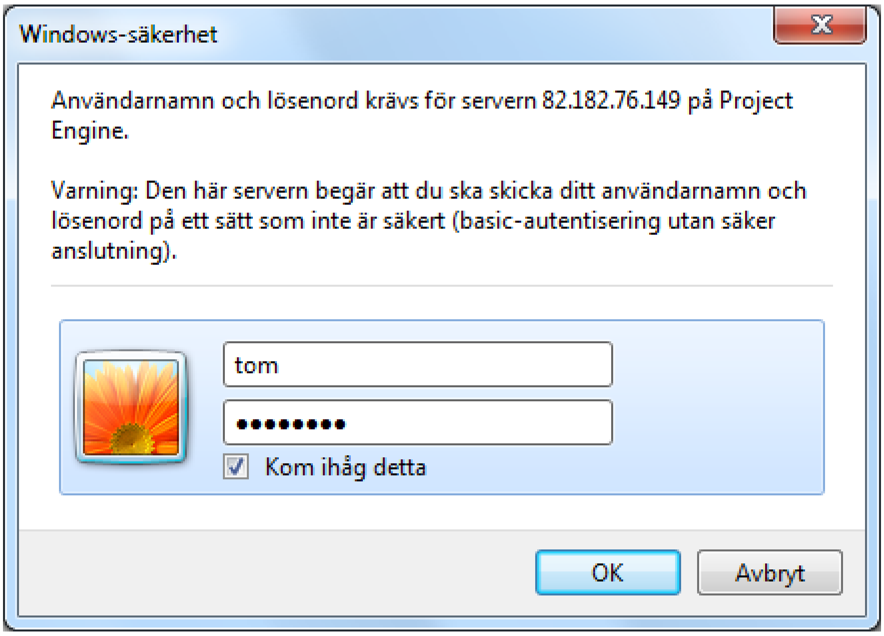
https://server_address:port_number/ProjectEngineWebClient

Example when connecting to the web interface on a local server on port 1234:

http://localhost:1234/ProjectEngineWebClient

### Authentication

The system will prompt for a user and password when accessing the application for the first time during a session.



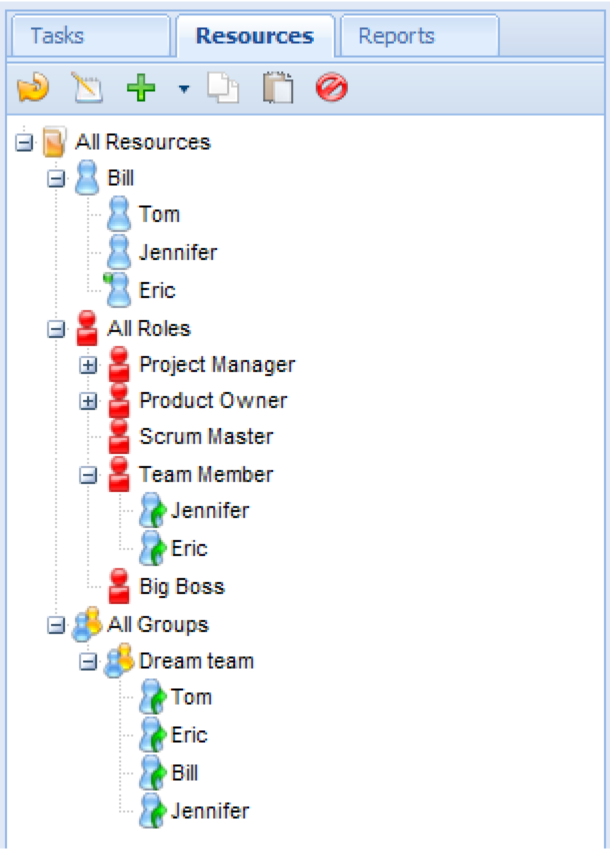

  

## Resources

There are three types of resources in Project Engine:

- Users
- Roles
- Groups

Resources are managed using the "Resources" tree. Resources can be nested; in other words, there could be sub-roles and sub-groups under a role or a group. Even users can be nested. The tree of users should reflect the line organization of the company with the highest manager at the top. A small green circle next to a user indicates that the user is currently on-line.




### Adding Resources

Select a resource and press the "New" button to add a new child resource. Follow the steps below to setup resources:

1. Add users reflecting your company structure.
2. Add roles and groups below "All Roles" and "All Groups".
3. Drag and drop users into the roles and groups.

### Moving Resources

Resources can be moved by using drag-and-drop.

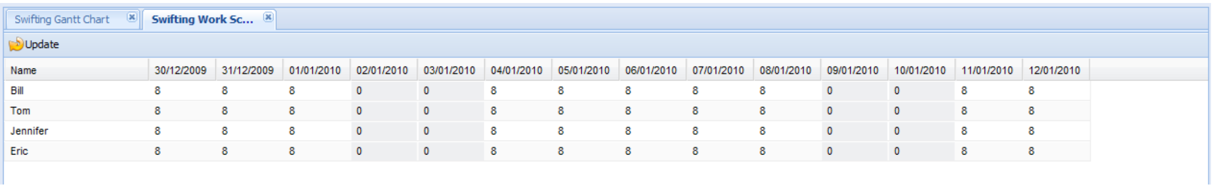
### Work Schedule

Users have an individual work schedule. Define a typical working week in the ”Working hours” group in the ”User” dialog.

Exceptions to the typical working week can be edited in the ”Work schedule report”. Select ”Work schedule report” from the ”New” drop-down list in the ”Resources” tab. Edit the fields below before clicking the ”Save” button:

| Group | Field | Description |
|---|---|---|
| Report | Name | Enter the name of the new report. |
| Report | Visible to | Select a group of users that will be able to view this report. Leave this field blank to create a private report. |
| Report | Resources | Resources to include in the report. |
| Report | From date | Set the first date to include in the report. Leave blank for current date. |
| Report | Time period | Set the number of days to display in the report. |
| Filter | Root task | Select the project task. The project task and all subtasks will be included in the report. |

Edit the working hours directly in the table. Press enter to save a change.




| Name | 30/12/2009 | 31/12/2009 | 01/01/2010 | 02/01/2010 | 03/01/2010 | 04/01/2010 | 05/01/2010 | 06/01/2010 | 07/01/2010 | 08/01/2010 | 09/01/2010 | 10/01/2010 | 11/01/2010 | 12/01/2010 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bill | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 8 |
| Tom | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 8 |
| Jennifer | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 8 |
| Eric | 8 | 8 | 8 | 0 | 0 | 8 | 8 | 8 | 8 | 8 | 0 | 0 | 8 | 8 |

## Planning

Perform the following steps to create and plan your project:

1. Create a new project.
2. Break down the project into smaller tasks.
3. Estimate the tasks.
4. Assign the tasks.
5. Add task dependencies.
6. Review the plan.

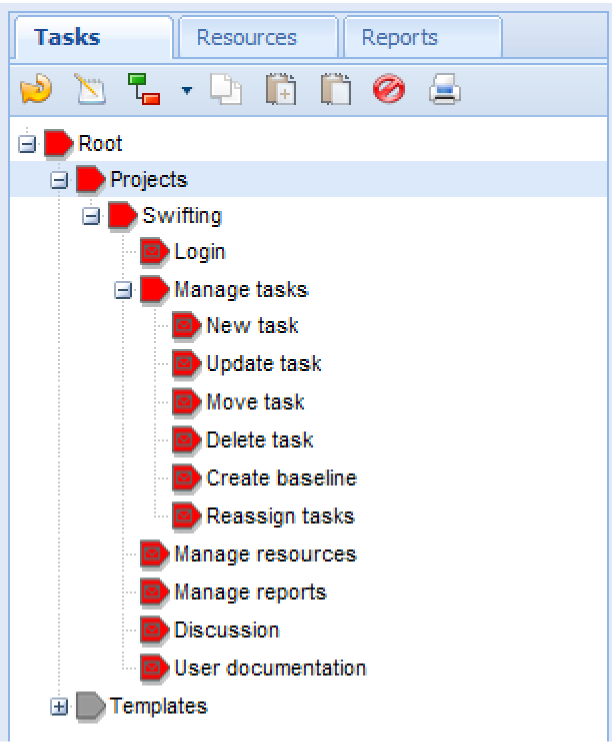
### Creating a New Project

A project is simply a type of task in Project Engine. Select the ”Projects” task and click the ”New subtask” button to create a new project. Edit the field below before clicking the ”Save” button:

| Group | Field | Description |
|---|---|---|
| Task | Title | Enter the title of the task. |
| Task | Goal description | The goal of the project. Normally a more detailed explanation than the title. |

### Project Breakdown

Break down the project into subprojects or tasks. You may break the project down in any number of levels but we recommend to begin with a course grained structure and let other users continue the breakdown when more details are required.



### Estimating Tasks

Estimate all the tasks in your project, but only the once that do not have any subtasks. Enter the work in the ”Work remaining” field. Work should be entered in man hours.

### Assigning Tasks

Assign all estimated tasks to resources. You may assign a task to a user or indirectly to a role/group.

### Task Dependencies

Some tasks may have dependencies on other tasks. Project Engine can handle the following types of dependencies:

1. Deliver subtasks in a sequence.
2. A tasks should be delivered after another task has been completed.
3. Deliver a task at a date and/or time.
4. Custom dependency.

Delivery options can be found in the ”Delivery” section of a task:

| Group | Field | Description |
|---|---|---|
| Delivery | Deliver subtasks in sequence | Select ”Yes” to deliver subtasks one by one after being completed. The task icon will indicate this by pointing down. |
| Delivery | Delivery date | Delay delivery until this date. |
| Delivery | Delivery time | Delay delivery until this time. |
| Delivery | Predecessor | The predecessor task must be completed before this task is delivered. |

### Review the Plan

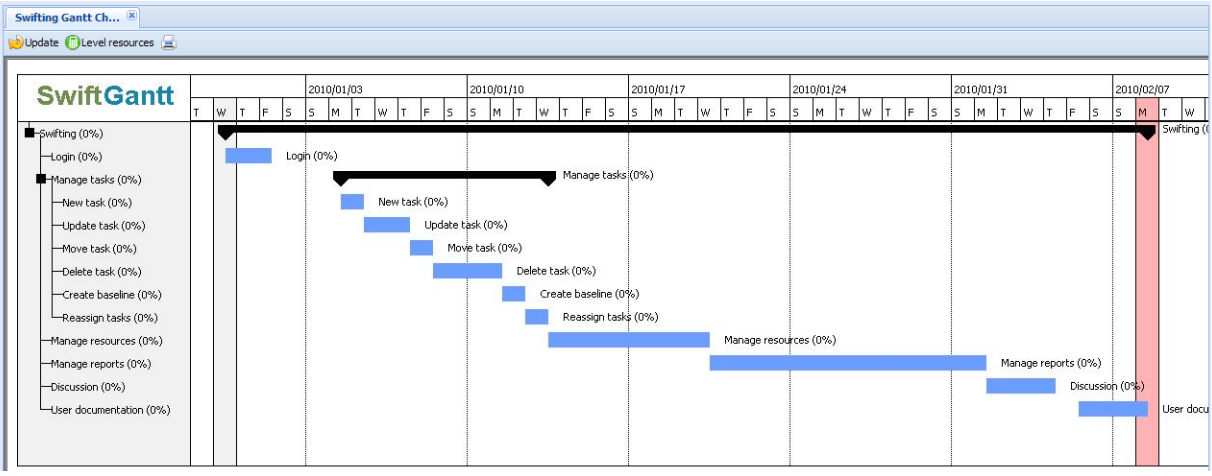
Create a Gantt chart to view the tasks in the project from a time perspective. Select ”Gantt chart” from the ”New” drop-down list in the ”Resources” tab. Edit the fields below before clicking the ”Save” button:

| Group | Field | Description |
|---|---|---|
| Report | Name | Enter the name of the new report. |
| Report | Visible to | Select a group of users that will be able to view this report. Leave this field blank to create a private report. |
| Filter | Root task | Select the project task. The project task and all subtasks will be included in the report. |
| Chart | From date | Set the first date to include in the chart. Leave blank for current date. |
| Chart | Time period | Set the number of days to display in the chart. |

Double-click the new report to display the chart in the report view. Click the ”Level resources” button and edit the fields below before clicking the ”OK” button:

| Group | Field | Description |
|---|---|---|
| Properties | Root task | The task to level resources on. Should already point to the project task. |
| Properties | Time period | The number of days to simulate. You might need to increase this number if you have a large project. |

Level resources will calculate the calendar time to complete the tasks based on ”Work remaining” and the work schedule of the resources. The Gantt chart might look something like this after resource leveling:




## Baseline

It is optional to create a baseline when satisfied with the initial plan. The baseline can be used as a comparison against the actual outcome when the project is in progress.

Right-click the project task and select ”Create baseline” from the menu to create a baseline. A new disabled structure will be created. Do not delete the disabled tasks unless you intend to create another baseline.

## Tracking

The tracking phase begins when the first task has been started.

### Task Status

The color of a task reflects the status:

| Color | Status | Description |
|---|---|---|
| Red | Not Started | A new task is non-started by default. |
| Yellow | In Progress | Use the action ”Start Task” to change the status from ”Not Started” to ”In Progress”. |
| Green | Completed | Use the action ”Complete Task” to change the status from ”In Progress” to ”Completed”. |

Starting a subtask will automatically start all parent tasks. A parent task will be completed automatically when all subtasks are completed.

Note that you may not change the task status field directly. Use actions to change the task status.

### Delivery

A task will be delivered to a resource when there are no dependencies. A small envelope on task in the task tree indicates that a task is delivered. Delivered tasks are visible in a users ”My To-Do List” report. An email notification will be sent to a user when a task has been delivered (if this feature is enabled).

### Updating a Task

Open a task by double-clicking it or using the ”Edit” button or menu item. Edit any number of fields before selecting an action or clicking the ”Save” button. The most commonly used fields are described below:

| Group | Field | Description |
|---|---|---|
| Task | Title | The title of the task. Must not be blank. |
| Task | Goal description | The goal of the task. Normally a more detailed explanation than the title. |
| Task | Assigned to | The resource that should complete this task. A user, role or group. |
| Task | Result description | The current result. The resource assigned to this task is responsible for updating this field. |
| Task | Priority | The priority compared to other tasks. |
| Task | Status | The status of the task: Not Started, In Progress or Completed. The status field may not be changed directly, only using actions. |
| Task | Work done | Hours spent on this task. |
| Task | Work remaining | Estimated hours remaining until this task can be completed. |

### Changing the Task Status

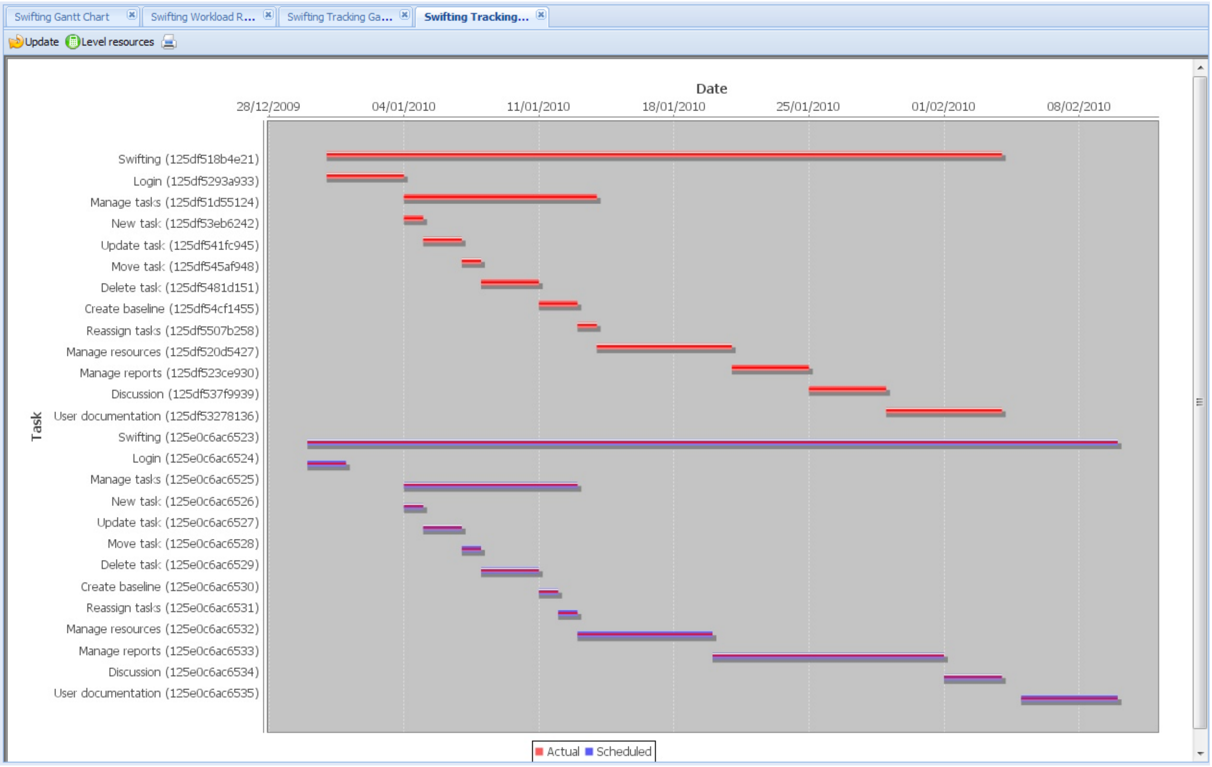
The status of a task may not be changed directly. Use actions to change the status of a task. Open a task and select an action from the ”Action” drop-down list to change the status. Any updated fields will be saved before changing the status.

### My To-Do List

The ”My To-Do List” report is a task report that lists all tasks delivered to the current user. The main goal for a user is to complete the tasks in this report. Open a task by double-clicking it.

### Tracking Gantt Chart

The Tracking Gantt chart shows both the actual and the scheduled (original) time plan in the same chart. This chart will only show the scheduled time plan if there is a baseline created for the project.

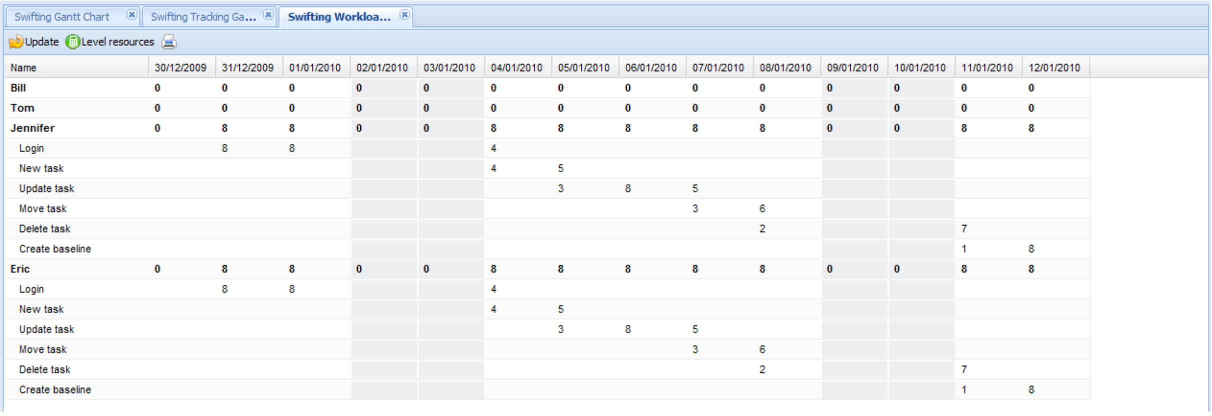



### Workload

The workload report shows the actual and estimated workload on the resources. Select ”Workload report” from the ”New” drop-down list in the ”Resources” tab. Edit the fields below before clicking the ”Save” button:

| Group | Field | Description |
|---|---|---|
| Report | Name | Enter the name of the new report. |
| Report | Visible to | Select a group of users that will be able to view this report. Leave this field blank to create a private report. |
| Report | Resources | Resources to include in the report. |

| | | |
|---|---|---|
| Report | From date | Set the first date to include in the report. Leave blank for current date. |
| Report | Time period | Set the number of days to display in the report. |
| Filter | Root task | Select the project task. The project task and all subtasks will be included in the report. |



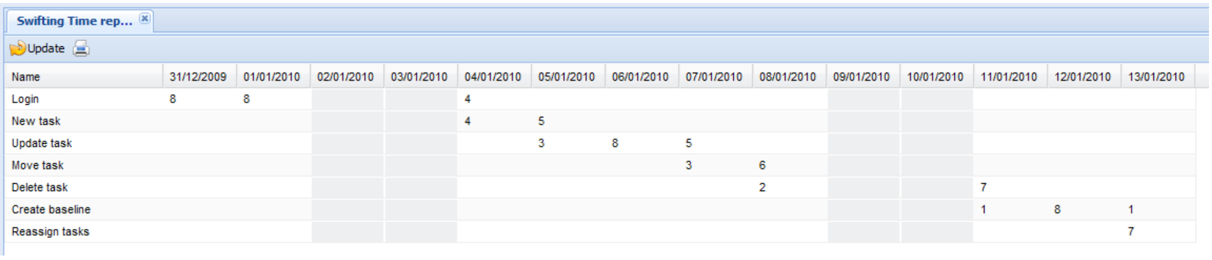

| Name | 30/12/2009 | 31/12/2009 | 01/01/2010 | 02/01/2010 | 03/01/2010 | 04/01/2010 | 05/01/2010 | 06/01/2010 | 07/01/2010 | 08/01/2010 | 09/01/2010 | 10/01/2010 | 11/01/2010 | 12/01/2010 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Bill** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| **Tom** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** |
| **Jennifer** | **0** | **8** | **8** | **0** | **0** | **8** | **8** | **8** | **8** | **8** | **0** | **0** | **8** | **8** |
| Login | | 8 | 8 | | | 4 | | | | | | | | |
| New task | | | | | | 4 | 5 | | | | | | | |
| Update task | | | | | | | 3 | 8 | 5 | | | | | |
| Move task | | | | | | | | | 3 | 6 | | | | |
| Delete task | | | | | | | | | | 2 | | | 7 | |
| Create baseline | | | | | | | | | | | | | 1 | 8 |
| **Eric** | **0** | **8** | **8** | **0** | **0** | **8** | **8** | **8** | **8** | **8** | **0** | **0** | **8** | **8** |
| Login | | 8 | 8 | | | 4 | | | | | | | | |
| New task | | | | | | 4 | 5 | | | | | | | |
| Update task | | | | | | | 3 | 8 | 5 | | | | | |
| Move task | | | | | | | | | 3 | 6 | | | | |
| Delete task | | | | | | | | | | 2 | | | 7 | |
| Create baseline | | | | | | | | | | | | | 1 | 8 |

### Time Reporting

The time report can be used for entering performed or planned work. Enter the work hours directly in the table. Select ”Time report” from the ”New” drop-down list in the ”Resources” tab. Edit the fields below before clicking the ”Save” button:

| **Group** | **Field** | **Description** |
|---|---|---|
| Report | Name | Enter the name of the new report. |
| Report | Visible to | Select a group of users that will be able to view this report. Leave this field blank to create a private report. |
| Report | Resources | User to display and edit working hours for. |
| Report | From date | Set the first date to include in the report. Leave blank for current date. |
| Report | Time period | Set the number of days to display in the report. |
| Filter | Root task | Select the project task. The project task and all subtasks will be included in the report. |

An example of a time report for a user:




| Name | 31/12/2009 | 01/01/2010 | 02/01/2010 | 03/01/2010 | 04/01/2010 | 05/01/2010 | 06/01/2010 | 07/01/2010 | 08/01/2010 | 09/01/2010 | 10/01/2010 | 11/01/2010 | 12/01/2010 | 13/01/2010 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Login | 8 | 8 | | | 4 | | | | | | | | | |
| New task | | | | | 4 | 5 | | | | | | | | |
| Update task | | | | | | 3 | 8 | 5 | | | | | | |
| Move task | | | | | | | | 3 | 6 | | | | | |
| Delete task | | | | | | | | | 2 | | | 7 | | |
| Create baseline | | | | | | | | | | | | 1 | 8 | 1 |
| Reassign tasks | | | | | | | | | | | | | | 7 |

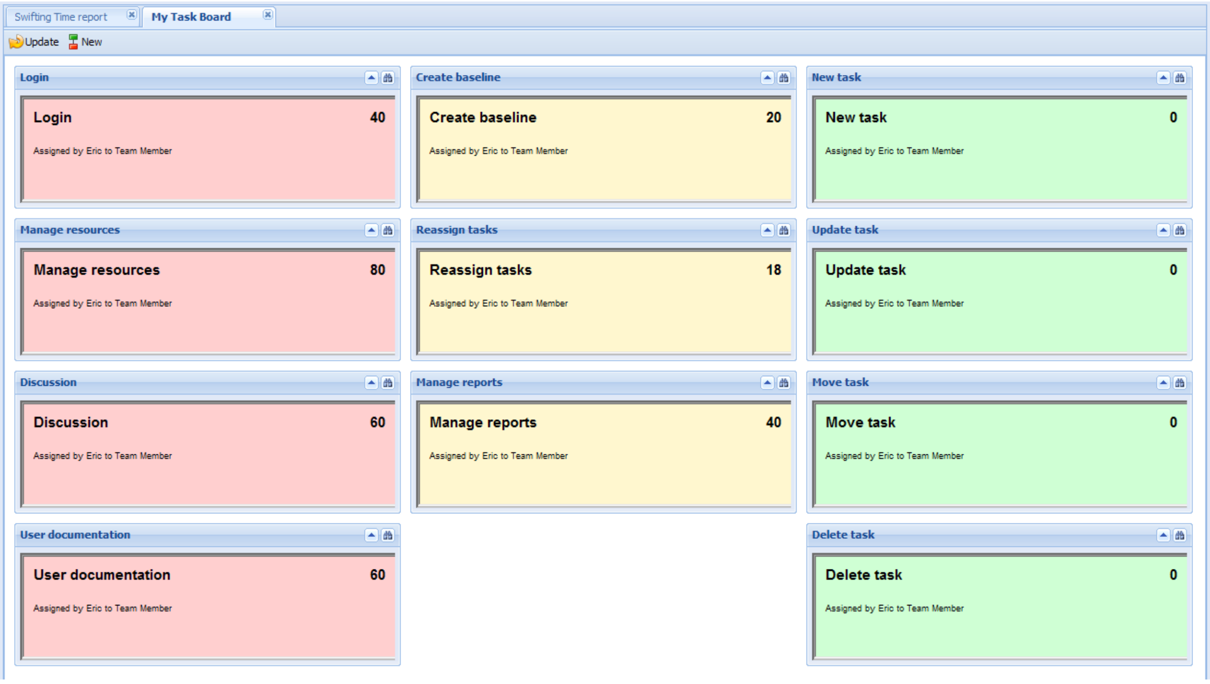
### Task Board

The task board provides a great overview over tasks and their status. Use drag-and-drop to change the status of a task. Move a non-started (red) task to the middle column to start the task. Move a task to the right column to complete a task. Moving a task back to the first column will reset the task status.

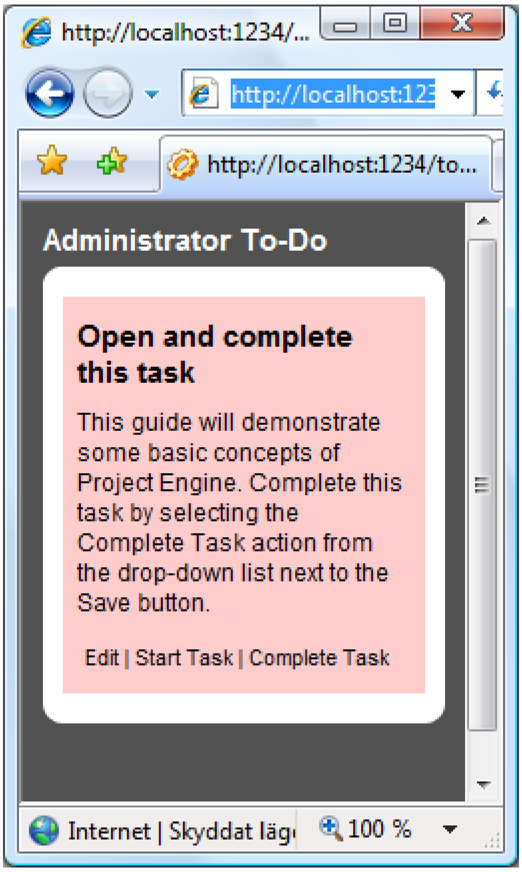
Select ”Task board” from the ”New” drop-down list in the ”Resources” tab. Edit the fields below before clicking the ”Save” button:

| Group | Field | Description |
|---|---|---|
| Report | Name | Enter the name of the new report. |
| Report | Visible to | Select a group of users that will be able to view this report. Leave this field blank to create a private report. |
| Filter | Root task | Select the project task. The project task and all subtasks will be included in the report. |

The task board displays the title, goal description, total work remaining and some other fields by default:



## To-Do List




Project Engine Server has a simple To-Do list to enable a user to view currently delivered tasks from a web browser in a cell phone or a PDA. Tasks may be started or completed from the To-Do list by selecting the "Start Task" or "Complete Task" links.

Note that the To-Do list can also be used as a simple alternative to the Project Engine Web interface.

### Edit a Task

Select the "Edit" link to edit a task in the list. Edit the "Result description", "Work remaining" and "Work done" fields and press the "Save" link.

### Starting the To-Do Service

Providing a user_id and password parameter (or session) is optional. Project Engine will request basic authorization and the browser will ask for a user and password.

Use one of the requests below using an XHTML enabled cell phone (or a web browser) to see the To-Do list:

http://server_address:port_number/todo

http://server_address:port_number/todo?user_id=xxx&password=xxx

http://server_address:port_number/todo?session=xxx