

Working With Projects & Tasks

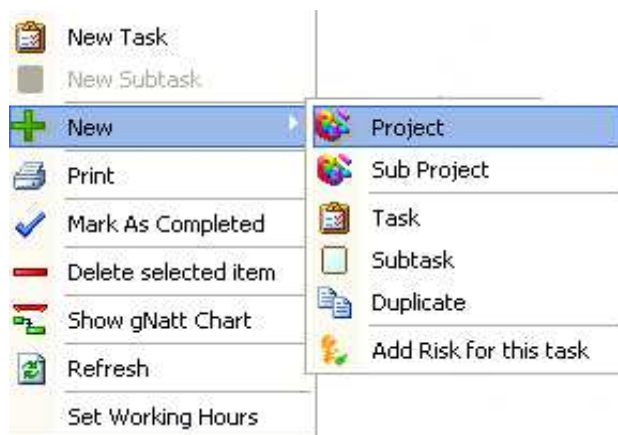
Overview:-

The Project & Task Module is divided into two sections - "Planned" and "Actual". The Planned section helps in planning of a project while the Actual section keeps track of your current proceedings.

To maintain tight integrity between work planned and work executed all working level calculations are allowed at the "Sub task" level only. So, in order to plan a project you first need to add a "New Task" and then under it add a "Sub task".

Creating a "Project" for the first time:-

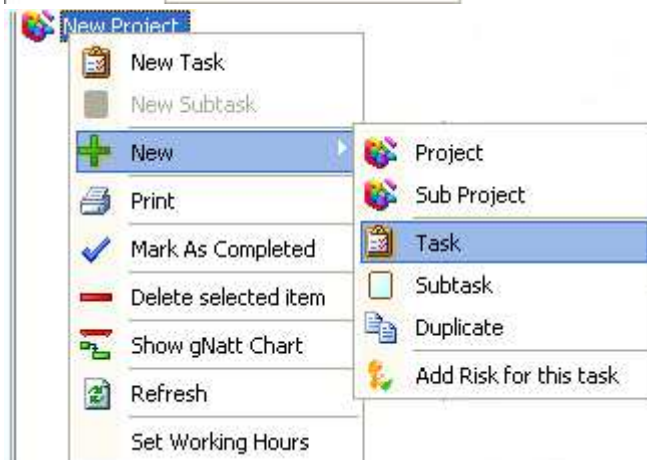
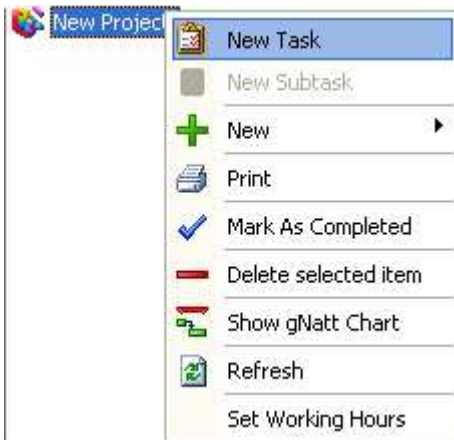
To add a new Project, right click on the tree view screen, and select New > Project.



Creating a "New Task":-

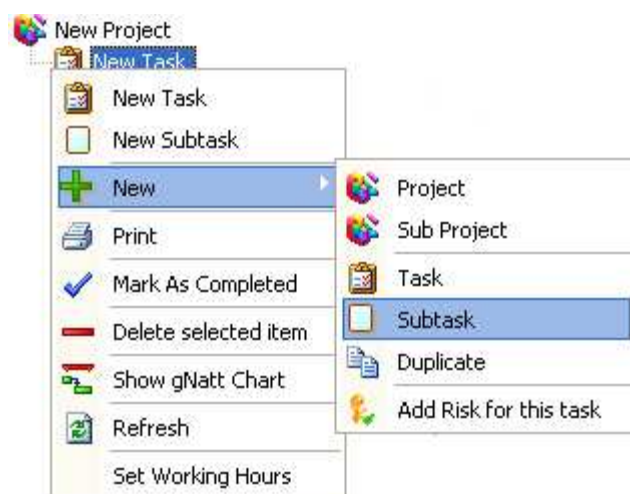
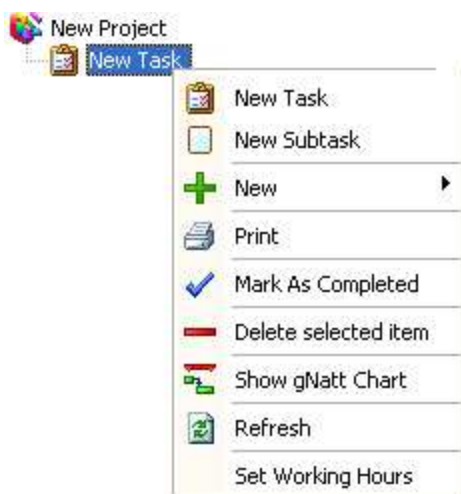
To add a New Task at any stage, select the stage (Project or Task), then right click and select "New Task". You can also perform the same operation by right clicking and selecting New > Task.

Note:- You can also add a New Task under the Subtask by selecting the Subtask and repeating the steps explained above. But doing this might lead to loss of information which that Subtask might contain.



Creating a "New Subtask":-

To create a New Subtask at any stage, select the stage (Task or Subtask), right click and select "New Subtask". You can also perform the same operation by right clicking and selecting New > subtask



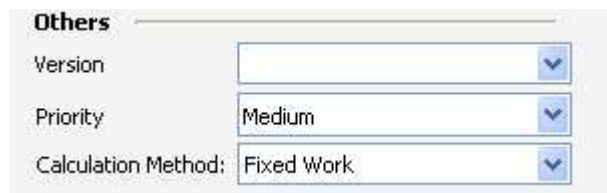
Note:- You cannot add a New Subtask at the Project level. To add a New Subtask at the Project level you first need to add a Task.

Setting the "Priority" and "Calculation Method":-

"Calculation Method" can be set only at the Project level i.e. you need to set them before creating any Task for that project. By default the Project level setting will appear under all its dependents.

Priority – You can select the priority of the Project or Task or Subtask from five preset levels i.e. Low, Medium Low, Medium, Medium High and High.

Calculation Method – You can select one of the four preset method of calculation i.e. Fixed Work, Fixed Duration, Fixed Resource and None. As the name suggests you may choose a project to have a fixed amount of work or a fixed duration or a fixed resource allocation or you may opt to choose no calculation method at all.



The image shows a screenshot of a software interface titled "Others". It contains three dropdown menus. The first is "Version" which is currently empty. The second is "Priority" which is set to "Medium". The third is "Calculation Method:" which is set to "Fixed Work". Each dropdown menu has a small downward-pointing arrow on the right side.

Setting the "Source", "Users", "Attachments" and "Actions" :-

Setting the "Source":- The "Source" can be set only at the Project level.

Source Type:- You can select the source of the project from five preset levels i.e. None, Company, Individual Contact, Freelance Website and Other Contacts.

Company/ Contact/ Website:- This field lets you choose from one of your existing contacts.

Bid Name:- This field lets you select the project bid or lead that has resulted or converted into the project.

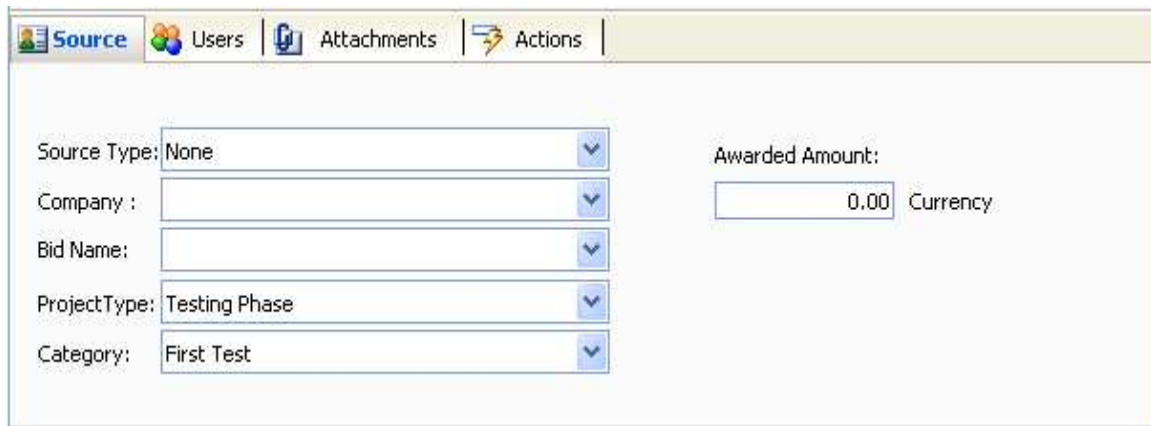
Project Type:- This field lets you choose from one of your existing project type.

Category:- This field lets you choose from one of your existing category under the selected project type.

Awarded Amount:- You can put the amount at which the project has been awarded to you.

Note:- Whenever you create a new Project, make sure you select the Source for the Project, otherwise you would not be able to allocate Billable Expenses on the Project. The reason for this is simple, Billable Expenses are allocated on Projects and Clients.

Hence If a Project is not associated with a source, then there is no way Billable Expenses can be allocated to that Project.



Source Type: None

Company :

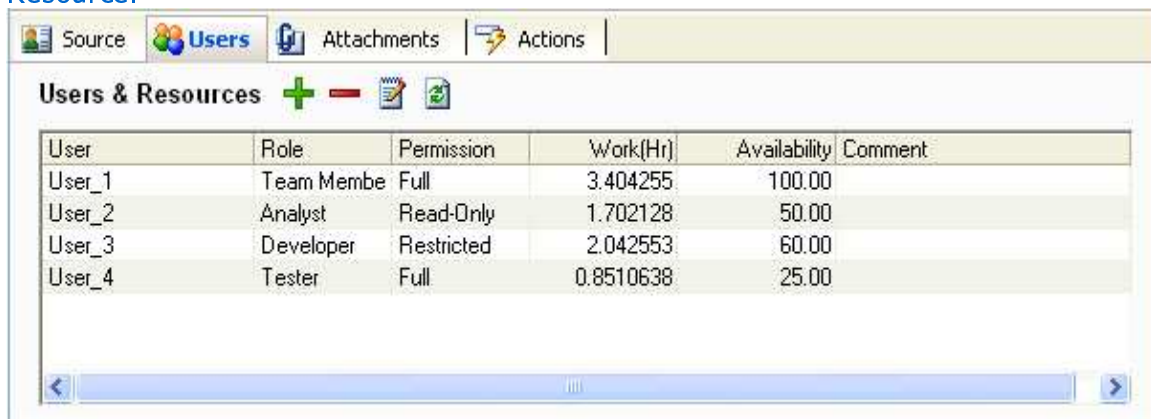
Bid Name:

ProjectType: Testing Phase

Category: First Test

Awarded Amount: 0.00 Currency

Setting the "Users":- The heart of Work Calculation is the selection of "Users" and their "Availability". You can select a user from a set of pre existing contacts added as team members when you added them to contacts. You can assign Role and Permission to individual user. A total availability of 100% is equivalent to one Resource.



Users & Resources

| User | Role | Permission | Work(Hr) | Availability | Comment |
|--------|------------|------------|-----------|--------------|---------|
| User_1 | Team Membe | Full | 3.404255 | 100.00 | |
| User_2 | Analyst | Read-Only | 1.702128 | 50.00 | |
| User_3 | Developer | Restricted | 2.042553 | 60.00 | |
| User_4 | Tester | Full | 0.8510638 | 25.00 | |

Setting the "Attachments":- You can attach any digital documents related to the task.

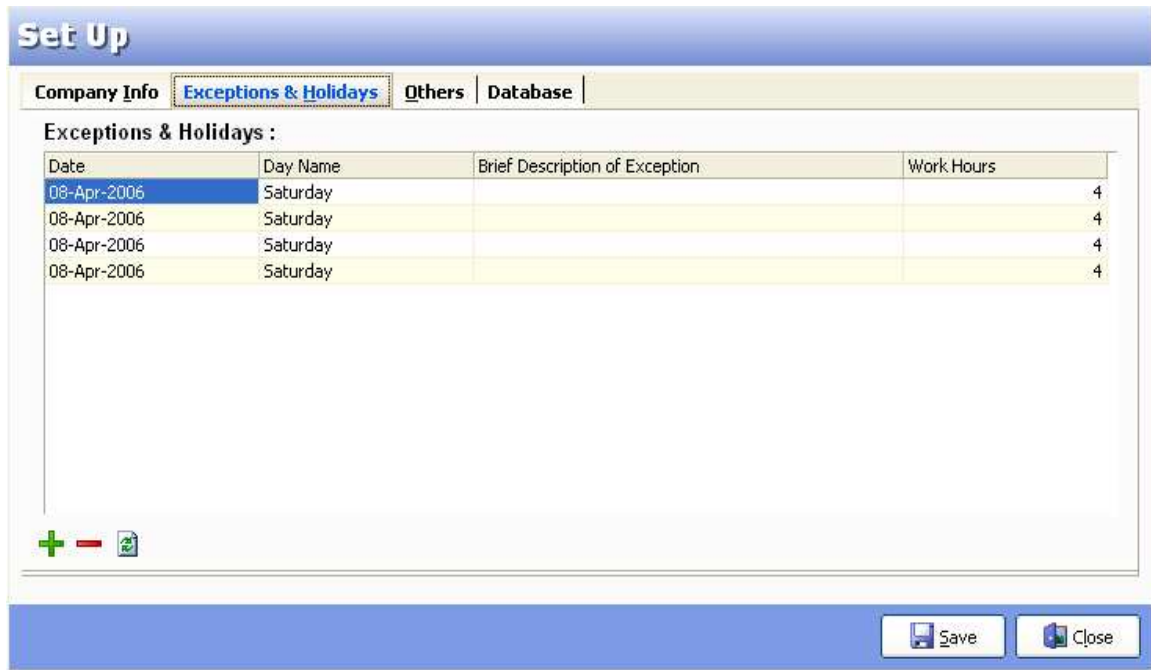
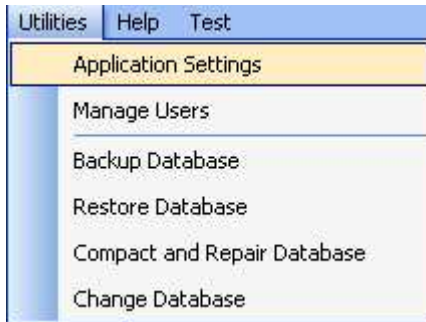
| Title | Type | Size | Date Attached |
|------------|------------------------|----------|---------------|
| Test Doc_1 | Microsoft Word Docu... | 19.50 KB | 22-Aug-2006 |
| Test Doc_2 | Microsoft Word Docu... | 19.50 KB | 22-Aug-2006 |
| Test Doc_3 | Microsoft Word Docu... | 19.50 KB | 22-Aug-2006 |
| Test Doc_4 | Microsoft Word Docu... | 19.50 KB | 22-Aug-2006 |

Setting the "Actions":- You can assign the action of any work to be done by an individual by selecting from a pre existing contacts added as team list members. You can also set the Start Date and Priority of the action. This section also contains the option to put the % Complete and Date Completed once the action undertaken.

| Description | Assigned To | Priority | Finish By | Complete... | Finish Date |
|---------------------------|-------------|-------------|-------------|-------------|-------------|
| Testing the Action Module | User_1 | Medium High | 22-Aug-2006 | 90.00 | |
| Testing | User_2 | Low | 16-Aug-2006 | 100.00 | 15-Aug-2006 |
| Data Creation | User_3 | High | 22-Aug-2006 | 100.00 | 23-Aug-2006 |
| <New Action> | User_4 | Medium Low | 15-Aug-2006 | 0.00 | |

Setting the "Application Settings":-

Before you start the day wise / hourly planning there is one important thing left to be done i.e. setting the Weekly Working Hours and Exceptions & Holidays. To set the working hours and holidays go to main menu select "Utilities" in its sub-menu select "Application Settings". Under this head you can set the Weekly Working Hours, Exceptions & Holidays, your Company Information and the Path of Your Database.



Planning a Project:-

Once the Resource and Application Settings have been done, depending upon the Calculation Method you need to fix the Work or Duration. Now you can select the "Earliest Start Date" from the calendar control. Depending on the Earliest Start Date, Work and Duration provided by you the software will calculate the "Start Date" and "Finish Date".



Actual Project:-

| | |
|--|--------------------------------|
| Actual | |
| Start Date: | - - |
| Finish Date: | - - |
| Duration Elapsed or Taken: | 64. Hrs. (64.0%) |
| Remaining Duration: (if not finished) | 40. Hrs. |
| Actual Work Done: | 40. Hrs. |
| Remaining Work: | 100. Hrs. |
| Completed (%): | <input type="checkbox"/> 28.57 |
| Overrun/Underrun: | 0. Hrs. |

Start Date:- You can set the Start Date from the calendar control to the Subtask on which the work has actually started.

Finish Date:- You can set the Finish Date from the calendar control to the Subtask on which the work was actually completed.

Duration Elapsed or Taken:- This field has dual function. If you have not provided the Actual Start Date, then Duration Elapsed will be calculated as the difference between the Planned Start Date and Present System Date based on the Weekly Working Hours and Exceptions & Holidays set by you in the Application Settings.

In case you have provided the Actual Start Date but not provided the Actual Finish Date, then Duration Elapsed will be calculated as the difference between the Actual Start Date and Present System Date i.e. time taken since the project has been undertaken based on the Weekly Working Hours and Exceptions & Holidays set by you in the Application Settings.

In case you have provided the Actual Start Date and Actual Finish Date, then Duration Elapsed will be calculated as the difference between the Actual Start Date and Actual Finish Date i.e. it will give you the Duration Taken for the completion of the Subtask based on the Weekly Working Hours and Exceptions & Holidays set by you in the Application Settings.

Note:- All the above calculation does not take the current date into account.

Remaining Duration:-

a) If you have not provided the Actual Start Date.

Present System Date is less than or equal to the Planned Start Date, then Remaining Duration will be calculated as the difference between the Planned Finish Date and

Planned Start Date based on the Weekly Working Hours and Exceptions & Holidays set by you in the Application Settings.

Actual Start Date and Present System Date is less than or equal to the Planned Finish Date, then Remaining Duration will be calculated as the difference between the Planned Finish Date and Present System Date based on the Weekly Working Hours and Exceptions & Holidays set by you in the Application Settings.

Present System Date is greater than the Planned Finish Date, then Remaining Duration will be shown as '0' (zero).

Note:- All the above calculation takes the current date into account.

b) If you have provided the Actual Start Date but not provided the Actual Finish Date.

Present System Date is less than or equal to the Actual Start Date and Planned Start Date is greater than the Present System Date, then Remaining Duration will be calculated as the difference between the Planned Finish Date and Planned Start Date based on the Weekly Working Hours and Exceptions & Holidays set by you in the Application Settings.

Present System Date is less than or equal to the Planned Finish Date, then Remaining Duration will be calculated as the difference between the Planned Finish Date and Present System Date based on the Weekly Working Hours and Exceptions & Holidays set by you in the Application Settings.

Present System Date is greater than the Planned Finish Date, then Remaining Duration will be shown as '0' (zero).

c) If you have provided the Actual Start Date and Actual Finish Date.

Actual Finish Date is less than the Planned Start Date or equal to the Present System Date, then Remaining Duration will be shown as '0' (zero).

Actual Work done:- You can put the amount of Actual Work Done at the Present System Date.

Remaining Work:- Remaining Work is the difference between the Planned Work and Actual Work Done.

Completed (%):- This field is shown in percentage terms and calculated based Actual Work Done / Planned Work. Whenever you want to mark a Subtask as completed you need to click on the Completed check box provided. On checking this box the Actual Finish Date will take the Present System Date by default in case not provided by you. On the other hand if you provided the Actual Finish Date the box will be checked by default and set to '100'.

In case Actual Work Done is greater than or equal to the Planned Work then the percentage will be set to '99' by default. If you want to mark a Subtask as completed you need to click on the check box provided.

In case Actual Work Done is less than the Planned Work then the percentage will be calculated based Actual Work Done / Planned Work. If you want to mark a Subtask as completed you need to click on the Completed check box provided.

Overrun / Underrun:- In case Actual Work Done is greater than the Planned Work, then Overrun will be calculated as the difference between the Actual Work Done and Planned Work.

In case Actual Work Done is less than the Planned Work, then Underrun will be calculated as the difference between the Planned Work and Actual Work Done.