



MobilePM

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MobilePM for your iPhone is a comprehensive project management tool designed to support a wide range of project managerial work. To meet different needs, the MobilePM features several parameters for individual operations, which must be configured properly prior to use. See the following for a quick start:

- [Getting Started](#)
- [MobilePM Weblog](#)
- [MobilePM Samples](#)
- [MobilePM HOWTOs](#)

Getting Started

To be able to use MobilePM, take the following steps to configure your MobilePM for basic operation:

1. Select **Administration** in the main menu ☰ at the top left corner and open **Identity** by pressing the button ⓘ. In the **Certificate Center**, call the function **Activate default certificate** in the menu ⏏ at the top right corner.
2. Back to Administration. Press the row **Import Address Book** to import somebody from your contacts, who represents the MobilePM user. Or open **Contributors** and create a contributor from scratch. For security reasons, you will be prompted to give an access code that will protect your data from accidental change. Please keep this access code safe for later use.
3. Press the button ⓘ behind **Contributors**. Open the contributor you just created and activate it as the MobilePM current user, i.e. push the button ⓪ behind **Authorized to reporting**. You will be asked to input your access code again. After it is turned on, then back to the main page **Mobile Project Manager**.

Now, your MobilePM is ready for you to define, run and manage your project.

Currently, MobilePM is able to generate major reports in three different languages: English, German and Chinese. If you are working with MobilePM for the first time, please spend a few minutes reading the following subject areas and then make necessary steps to set up your project and the project team further, if required.

- [How to plan your holidays](#)
- [How to manage your contract](#)
- [How to create your project](#)
- [How to create your timesheet](#)
- [How to track progress and status](#)
- [How to invoice your client](#)
- [How to create satisfaction survey](#)
- [How to synchronize data](#)
- [Tutorial list](#)



Plan your holidays

A holiday plan documents those days that you plan not to work. This reduces your availability to the project work and must be taken into consideration prior to releasing your project plan.

You are allowed to create as many holiday plans as you want. However, in most cases you will have one for each year, in which public holidays and your private vacations are documented. If required, you can print out your vacation plan as CSV-file for management approval.

For details on how to create your holiday plan, refer to the relevant part in Tutorial T5.



Manage your contract

In terms of MobilePM, a contract defines the service positions with billing conditions such as contingency in man-day, hourly or daily rate and valid time period. You can associate your contract with one or several projects, which should deliver the services agreed in the contract. All the resources, so-called contributors assigned to the service positions will be used for you to staff your project later on.

MobilePM provides the function **Timeline and budget** that shows you the total budget and its allocation to each contributor. Low budget values or mismatching begin or end times will be marked in red. If you have already associated your project, MobilePM allows you to compare the contract budget and the time efforts estimated by your project team. If any conflict arises, you should resolve it before going forward. This can avoid potential pitfalls in the later phases.

In the course of running your project, you can use the contract view to check the fulfillment of your contract in terms of

- Bills already settled
- Bills that are still open
- Labor time reported by each single contributor

For details on how to create a contract, refer to the relevant part in Tutorial 2.



Plan your project

Time spent planning is time well spent. Your project must have a plan with enough detail so that everyone involved knows where and how the project is going. A good plan should:

- Clearly document milestones and deliverables;
- Allow accurate cost estimates;
- Detail resource requirements;
- Have a realistic schedule of tasks to be done;
- Act as an early warning system, providing visibility of task slippage;
- Keep the project team focused and aware of progress.

MobilePM provides a set of tools that support you in creating such a plan, tracking the

overall progress and reporting detailed status. All these are prerequisites for you to deliver a project successfully.

To create a project with MobilePM, you can proceed as follows and iterate necessary times until your plan meets all the project requirements:

- A good project template harvests valuable experience in running successful projects. If it can serve your project needs, it can save you a lot of time and avoid potential risks from the very beginning of your project. Firstly look for available project templates that might cover all or most of your project requirements. If you are lucky, use the project template found to create the initial work breakdown structure for your project. For example, if you run project for developing software solutions, consider the standard project template **OpenUP Basic Lifecycle**, which can be downloaded from mobilepm.info for free. Then customize the WBS carefully to meet specific needs of your project.
- Otherwise, you have to create your WBS from very beginning. MobilePM provides a full set of edit functions that allow you to create any kind of work breakdown structures defined by MobilePM. For further details refer to the relevant part in Tutorial T1.
- Perform cost estimates for each task defined. In doing so, you can use the project estimation settings to determine proper estimation method for your project needs:
 - Function Point
 - Story Point
 - Custom Metrics, so called expert estimatesEffort estimation in any complex project is a complicated topic that must be addressed carefully. Please follow best practices in your business field.
- Compare the efforts estimated with the overall budget target using the function **Project timeline & estimates ...** with your project. If there are any conflicts, make the necessary changes in terms of tasks to be done or budget target set by your client, and make sure that all the tasks planned can be done within the budget allocated and the time period planned.
- Staff your project and create one action plan for each contributor in your project. The action plan documents those days a contributor is going to work, that means they are available for your project work. MobilePM allows you to create a default action plan, which includes all the days except public holidays and your private vacations. In more complicated situations, for example, if you are working for more than one project in parallel, you need to determine each single working days by using the function **Add new workday ...**. Make sure that the available working days do cover the capacity demands of your project.
- Assign the tasks planned to each contributors involved. In doing so, please pay attention of qualification and timely availability of contributors under consideration.
- Using the function **Resource timeline & budgets**, compare the budgets allocated to tasks and assignments with the available working days and make any necessary reallocations. The bottom line is to make your project plan feasible.
- Walk through your plan with experienced project managers, if needed.
- Communicate the project plan to the stakeholder and project participants.

If you are working in a team, now it's time to distribute your project plan to your team members, who are in charge of executing the tasks assigned and delivering work products defined in your project plan. As mentioned in the introduction, you have several possibilities to distribute your project data among your team: AirDrop, email or HTTP in WLAN. Figure out what is the best way for your project situation.



Record work time and completion stage

As an universal project management tool, the effectiveness of MobilePM relies heavily on the accuracy and up-to-dateness of the work time spent in accomplishing a task as well as the completion stage of that task. Based on the data collected, MobilePM calculates the actual progress and compare it with the planned values. As a result, it measures your project performance and progress in an objective and comparable manner.

The work time you claimed will be used by MobilePM to generate timesheet for you as needed. MobilePM supports following types of labor time:

- Non-billable (including chargeable and travel time)
- Billable time

If you are going to charge your client for labor time, make sure that your claiming is correct.

It is very important to record your work time correctly and timely and update the completion stage of the task you performed. The straightforward way to record your work time is use the function **Time Reporting** in the main menu immediately after your work. This will dramatically improve your reporting accuracy and avoid unnecessary error that could happen, if you do afterwards.

As far as you recorded work time, check immediately, whether you need to update the completion stage of the task you worked on.



Track progress and report status

MobilePM uses the well-known earned-value analysis (EVA) as the underlying method to determine the project overall progress and the differences between planned and actual costs in terms of labor time and schedule. The values calculated give you the big picture on how well your project is running in terms of cost and scheduling efficiency. To avoid judgment on the basis of incorrect or inaccurate data, it is important to get the latest updates from all your team members ahead of reporting.

MobilePM provides useful functions for you to get insight on the developing progress and lets you analyze potential weak points exposed through EVA:

- **Monitoring Center** shows the earned values so far and overall schedule performance index at the time of reporting. The following information will be reported for your assessment and decision-making:
 - Total budget (man-day)
 - Total estimates
 - Total effort performed
 - Remaining effort
 - Work completion (budget-weighted completion stage)
 - Results of EVA
 - Planned cost
 - Actual cost
 - Earned value

- Cost performance index
 - Schedule performance index
- Available resources: total number, overdue, working as well as waiting for start
- Available capacity: totally available, totally planned and still available workdays
- Tasks: total number, overdue, open and waiting for start
- Workproducts: total number, overdue, open and waiting for start
- Deliverables: total number, overdue, open and waiting for start
- **Critical tasks** will be shown after calling **Scheduled tasks**, which calculates the current schedule performance index of each task that is open, e.g. running or overdue. Use the filter criteria to show the troubled tasks, which are either behind the schedule or running too fast, that means they consumed too much labor hours ahead of your plan.
- **Critical resources** will be shown after calling **Planned workloads**, which calculates the planned utilizations for each week and working days as of tomorrow. Use the filter criteria to show over or underutilized working days. The utilization number input for each single day is not that important; much more important is the average weekly utilization, which should stay in the feasible range for contributors involved.
- To get developing story as your project progresses, you should regularly, say at least weekly, save the status with MobilePM. Timely status saved can be exported in CVS format. These historical data allow you to identify negative development tendencies at an early stage in your project. Therefore you will have the possibility to adopt any necessary mitigating measures.

One of the key factors to ensuring project success is team motivation. A motivated team will go the extra mile to deliver your project on time and to budget. One effective means of keeping your team motivated is to involve them throughout your project, encourage them to frequently update status of tasks they have done, report their work time spent and help them feel they are making progress.



Bill for your labor time

To invoice your client, MobilePM provides a simple way for you to create bill for your work time. You can create invoice for each single timesheet or put several timesheets together in one invoice, for example if you are project manager with billing responsibility for a team.

For details on how to create an invoice, refer to the relevant part in Tutorial 2.



Performance surveys

Customer satisfaction surveys gather feedback from your clients or project responsables on delivery performance or quality of deliverables delivered. They allow you to acknowledge good performance or identify problems occurring in your current delivery process. MobilePM supports the following survey types:

- **Project Health Check** gathers feedback on the general health status about your running project. It is attached to the project under **Health checks**.
- **Customer satisfaction survey** gives feedback on the overall performance of delivering a project. It is attached to the project under **Customer satisfaction surveys**.
- **Delivery performance** gathers feedback on the working performance of a project team member. It is attached to the project assignment of the team member under **Delivery surveys**
- **Deliverable survey** collects feedback on the quality of deliverables that was delivered as a result of project delivery.

By default, MobilePM provides no questionnaires of any type. You are encouraged to create your own questionnaires that meet your project-specific needs. Of course, you can share them among the MobilePM users you like, if it makes sense.

For details on how to create a survey, refer to the relevant part in Tutorial 2.



Data exchange

For data exchange between project team members, such as sending timesheets, updating project plan or status, MobilePM provides several comfortable ways for you to synchronize data:

- **Send by AirDrop** (at least iPhone5 or better). It is secure and fast for dedicated push in close distance.
- **Post by Email**. It is suitable for distribution in any user group. However, the maximum transferable size each time is limited, depending on your mailbox configuration.
- **Publish via Bonjour** (HTTP in WLAN). The data publisher is actually a dedicated HTTP server, which serves data request fast and in parallel. It is especially suitable for data synchronization among a large group within a LAN.

On the receiving side, if synchronization is performed, MobilePM will compare the timestamp of the last change of the local item, for example an existing task of your WBS, with that of the coming one. The most recent change will be used. If there is no corresponding local item, the coming item will finally be added to the MobilePM database on your device.



For more information, please check out the tutorials you need on the following site:

- [T1 - Project Planning](#)
- [T2 - Project Execution](#)
- [T3 - Team Support](#)
- [T4 - Document Center](#)
- [T5 - Holiday Plan](#)

Be patient, be productive and have fun with your MobilePM.

Empower your project management through mobility!

Your MobilePM Team

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