


T1 - Project Planning with MobilePM



The following tutorial describes only the basic functions of MobilePM in order to give you an initial idea of the possibilities offered by the tool. In our very simple example there is a client for whom we provide a service and to whom we subsequently wish to invoice the hours worked (see T2).

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Setting up the current user

1. Check your own contact details in the address book and complete them where necessary (name, first name, telephone number and e-mail will be taken from here later on).
2. Now launch MobilePM and call menu item "Administration" from the main menu.
3. Select item "Import". Your address book will open automatically and you can now select the desired entry from the list of contacts.
4. Now define a personal password in order to protect your data; this will be requested later on at the relevant point when saving your data.
5. MobilePM then automatically reverts to the administration view, where a 1 is now displayed under the Contributors entry (members or participants).
6. Click on the  icon to call up the list of contributors and open the details about your entry in the same way.
7. This is where you can check the data copied from the address book and the automated input in additional fields and, where necessary, modify them.

8. In order to save your changes, please select the  icon, then the "Update contributor ..." item and finally "Save". You will be requested to enter the password you defined under point 4 for security reasons.
9. If you wish to create invoices with MobilePM it is also now advisable to enter your bank account details:
 - a. For this purpose, re-open the detailed display of your own data under "Contributors" and call the "Financial Information" entry.
 - b. The subsequent dialogue now allows you to enter the relevant data for printing invoices such as the name of your company, tax number, bank account details and invoice address.
 - c. Save the data with "Save".
10. MobilePM supports work in a team. In order for MobilePM to recognise you as the current user, please activate the item "Authorized to Reporting" in the details and confirm this by re-entering your password.
11. Your data will now be flagged as "MobilePM Current User" in the administration area.
12. Finally, select a certificate to be used under "Identity". To do this, call up the  menu and select the "Activate default certificate" entry.




Note: Alternatively you can install your own certificate here. You can find more details on how to do this in the "MobilePM HOWTO".

You have now successfully concluded all the preparations required to use MobilePM. The full functionality of MobilePM is now available to you.

Creating a client






In the project business, work is often performed as a service for a client. Your client must first be entered as a contributor in MobilePM if you subsequently wish to present the hours worked as timesheets for signing off and automated invoicing. To do this, please proceed as follows:






1. First create the client as a contact in your address book.
2. Then call the entry "Import Address Book" from "Administration" in the main menu of MobilePM, select the appropriate contact and accept it.

3. A 2 is now displayed as the number of contributors. Press the  button to call the list of contributors and select the entry for the client from it. Then switch to the detailed view of the entry using .
4. Enter "Client" under item "Job role" and save the data with  "Update contributor ..." and "Save".
5. Then please enter the client's data for subsequent invoicing under "Financial Information" (e.g. company name and invoice address) and then save them with "Done".

Creating a contract








The basis for a subsequent invoice is always provided by the underlying contract. You create a contract in MobilePM as follows:


1. Select item "Contracts" from the main menu. Then choose  "Create new contract" and specify a name for the contract. The detailed view of the newly created contract will now be displayed.
2. This is where you can modify data to reflect the actual circumstances (e.g. start and end) and where you must enter the individual services ("Positions") offered that are later to be listed on the invoice together with the invoice number and client. To do this, please proceed as follows:
3. Enter the individual services by clicking on the  icon after the "Positions" entry. Use  "Create new position" to display the input dialogue. You can now enter a description for the service offered (e.g. "Consulting for project management") and save it with OK.
4. Then call this up using the  icon after the entry ""Consulting for project management" in order to add details to the service entered. Here you can, for example, capture the agreed budget for this service (this is generally a number of days) together with the role that you perform under the terms of the contact (e.g. consultant). Since the additional entries are made in a sub-dialogue, please save the data first with  "Save".


5. You input the agreed hourly rate under the "Hourly Rate" entry. Please call this using  and enter the appropriate € value. Again, use  to save.
6. The assignment of the person who is to provide the service (for example yourself) is made with the "Staffing" entry. Use  to access the list of available contributors (in the example these are only you and the client). Please select yourself and save the assignment with  "Save".
7. Now enter any contract number in field "Client's Contr.No" and the contractual partner (client).
8. Finally save the contract data in the usual manner with  "Save". This concludes creating a contract.

Creating a project including project planning


In the next step we wish to assign a project to the contract we have created. Since we have not yet created a project, we must first do so:


1. To this end, select the  entry "Create new project ..." in the main menu and then "New empty project". Please specify a name for your first project.
2. The project detailed view will then open automatically. A project can have a large number of characteristics. In the current example we will restrict ourselves to what we consider to be the most important aspects.
3. Since the project duration often differs from the term specified in the contract, please first enter the project duration in the "Begin" and "End" fields.
4. The next step is to assign the previously created contract. For this purpose, please select  "Contract" and then "Navigate to contract list", where you should select the previously created contract and call up the detailed view of the contract with . You can then select the project under item "Projects", add it using  and then save the input with  "Save".
5. Now please return to the project, as you must now assign resources to the project (i.e. the persons active in the project). To do this, call the "Staffing" item with  and then select the person by pressing the  button before the > sign (this comes

from the underlying contract). Save the data once more using  "Save".


6. A project structure (work breakdown structure, or WBS for short) shall be created now. In our example we will first create 3 phases (Phase 1, Phase 2, Phase 3) for the project as top-level activities. (In a real project these projects could also be called, for example: Analysis, Planning and Implementation.) For this purpose, please call the "Major Activities" entry, click on  "Create new activity ..." and enter the name "Phase 1" for the activity. Repeat this accordingly for phases 2 and 3.

Note: As a general principle, the duration of the project will be entered as default for all activities, but it is possible to modify this in the detailed view for each activity.



7. You call the detailed view in order to enter the task(s) that are to be performed within the three phases by selecting items "Activity" then "Tasks" and finally  "Create new task". Now please define a name for the new task. After confirmation with OK, the detailed view of the newly created task will open.

8. You can input a detailed text description of the relevant task by clicking on the  icon after the name of the task.

9. You also have the possibility in the detailed view to edit the exact parameters of tasks. This is where e.g. the duration of the individual task and the expected effort have to be entered:

10. Under item "Estimates" please enter the estimated overall effort in person-days under "Total Estimate" and save it with  "Save".

Note: Estimation method "Based on Unit of Work" should be deactivated as otherwise the effort will be calculated using the method defined under the UOW label.

11. Now specify who is to perform the task. In our example, you wish to take on this task yourself. Please select the  "Performer" entry, choose yourself as the resource and save this definition using  "Save". This process can now be repeated accordingly for all the activities and tasks that are to be created.

Note: You can also specify here whether the person is to assume responsibility for the task or simply work on the task by accessing the item once more and clicking on the resource several times. The person responsible for the task in question will also be displayed in the detailed view of the task.

Tip: Within the WBS view, you can copy and insert existing tasks using the "Copy" and "Paste" entries in the pop-up menu in order to easily create tasks with similar content and subsequently modify them. You can also change the sequence of tasks by moving selected tasks via the pop-up menu.

Congratulations! You have now successfully created your first project in MobilePM.

Feasibility check on project planning

In order to ensure the feasibility of the project you now wish to take a look at the planned effort and the time available for it according to the project plan. MobilePM provides 3 different views for this purpose:

1. Project timeline & estimates

Here a check is made on whether the tasks assigned to the individual phases (top level in the WBS) and the planned effort for them match the sum of the relevant budgets for the contributors responsible for them. Moreover, a check is also made as to whether the period assigned to the participating contributor is within the overall period planned for the task.

a) Example:

Task 1 has a projected effort (budget) of 30 days. 2 contributors have so far been assigned 10 days each -> a budget of 10 days remains.

In this example, therefore, there is still a budget to meet the task. This could be held in reserve or, for example, could be allocated to the two contributors assigned. Such tasks are displayed in brown.

b) Example:

Task 2 also has a projected effort of 30 days but the two assigned contributors each have a budget of 20, i.e. 40 days in total. Here the budget available for this task has been exceeded. Overplanned tasks are displayed in red. In such cases it is advisable to examine what the cause for this variation is and, if necessary, to modify the planning.

2. Project timeline & efforts

This view can be used when the project is running to check the current status of the amount of effort already performed.


3. Resource timeline & budgets

This view compares the project duration with the resources involved. All the tasks including duration and budget are included for each resource. Variations are highlighted in colour in this case, too.

a) Example: a task with a duration lasting beyond the planned end of the project is displayed in red.

- b) Example: a contributor who is available to the project before the start of his/her first task – i.e. possibly not yet fully committed – is displayed in brown.

The aim of this report is to achieve optimum workload utilisation for available resources.

For all 3 reports it is possible to display only the variations for the sake of clarity. For this purpose, select entry  "View mismatch only" from the menu. Shortfalls will always be displayed in brown and overruns in red.

The "Correct mismatch" allows you to correct all shortfalls automatically, i.e. durations and budget are automatically adjusted according to the bottom-up principle.

The "Trim timeline & budget" entry adjusts the periods of the resource involved and the budget allocated to each resource to match the tasks assigned to it. In this process, existing buffers are cleared, and the assigned contributor is available from the start of the first task assigned to him/her. (This means that the buffer indicated in example 2 will be cleared and the contributor will only be assigned to the project on the day on which his/her first task begins.)

In addition to the three reports described above for checking planning within the project, it is also advisable to make a comparison concerning duration and budget of the planned project and the underlying contract with the client. This involves questions such as: Is the contractually agreed budget sufficient? and: Are appropriate resources available for the planned tasks and is the timeline adequate, i.e. can all the tasks be performed in the agreed period as planned? The corresponding report called "Timeline + Budget" in the detailed project view under the "Contract" item of the main menu is provided for this purpose.

After carefully checking all the important project data, the project planning is finally available to you. Based on experience, you will only reach this stage in practice after several iterations involving all participants, but the time used for planning is a good investment as checking beforehand is always better than trying to put things right retrospectively.

As project manager you will now enter the phase of project execution. Tutorial 2 – Project Execution with MobilePM – will demonstrate how MobilePM assists you in this task.

(The tutorial was created by Oliver Knappe in collaboration with MobileLifeDesign)