# **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.

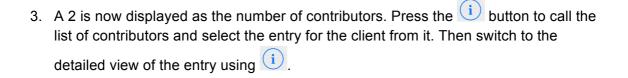
<u>Note:</u> Alternatively you can install your own certificate here. You can find more details on how to do this in the "MobilePM HOWTO".

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.



- 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".

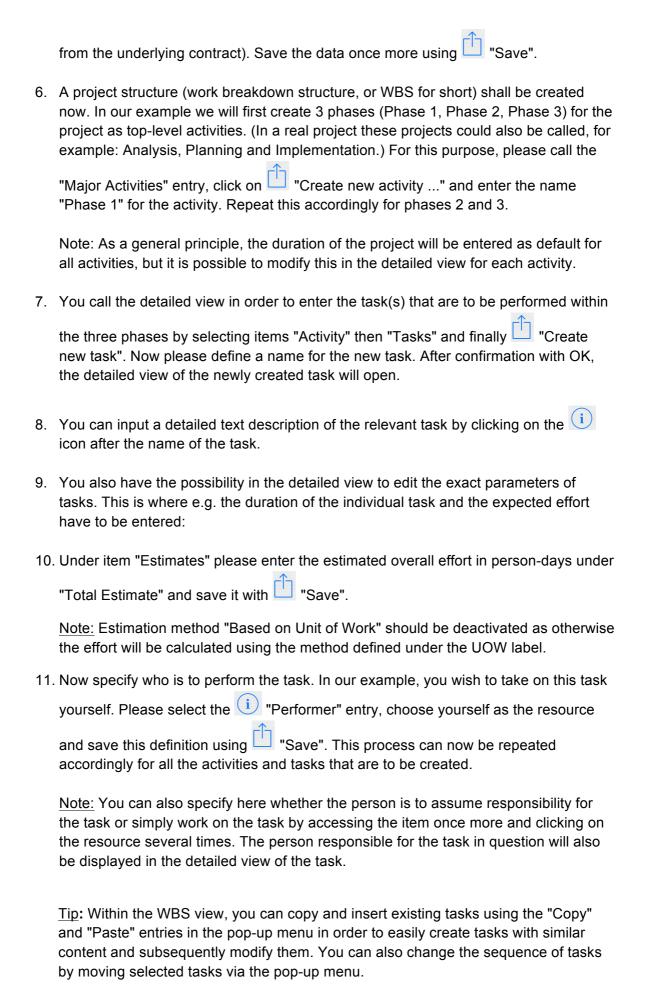
# **Creating a contract**

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 i 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 Tsave". This concludes creating a contract.
Crea	ting a project including project planning
	next step we wish to assign a project to the contract we have created. Since we have t 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 is "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 it.  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 i and then select the person by pressing the button before the sign (this comes
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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 availably 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)