T2 - Project execution with MobilePM

After you have drafted your project and completed the planning, you now move to the implementation of the planned activities. In the following tutorial, in order to provide an initial insight into the possibilities of MobilePM, we shall merely describe the essential functions of the tools, which support or accelerate the performance of your project management activities. In connection with this, we will primarily address the topics of project progress, timesheets and invoicing.

Contents:

Determination of project progress and creation of timesheets

Next, we wish to record progress on the duration of the project and the associated working times in order to subsequently be able to issue an invoice for the client.

1. In the main menu under "Task Inbox", you will find an overview of the current tasks in our current project and their status.

2. In order to record the progress of a task, select here the task concerned and change to the detailed view using . There you can select a % value under "Completion Stage" . The new value is accepted using OK and immediately saved.

    TIP: Detailed information regarding the current degree of completion can be undertaken under Progress or, for example, attachments from the document management or also photos from a whiteboard can be added. For this purpose, select the menu item "Create new status". You must now provide this status with a name. A new status report is created using OK. Subsequently, the "Short Report" dialogue will open up automatically. Then select the item "Create new note ..." in the menu. In the dialogue selection, which then follows, you have the possibility, for

example, to insert a photo from your albums using "Pick image from iPhoto", to attach an imported document or to record an individual note (Item: "New empty Note"). With the last item, you can record an individual text or, with a click on the camera symbol (bottom right), you can take and add a photo. However, do not forget to subsequently save the note using "Save".

3. In order to record the working time spent on a certain day in a simple manner, call up the item "Time Reporting" in the main menu.

4. Then please select the desired day (the current day is always preselected by default).

5. By clicking on the "Add" button, you then receive a list of all the tasks that fall into this period. Please select the desired task here.

6. Now record the beginning and the end of your working time in which you worked on this selected activity. If requested, the duration of a break can also be recorded; this is deducted accordingly from the working time.

7. This procedure can also be repeated as often as desired at any time.

In order to create a new timesheet, which lists the working hours performed on the respective activity, proceed as follows:

1. In the main menu, select the desired project from the item Projects by using . Then open the item "Staffing" using and select the employees involved from the list (i.e. yourself, in our example). Using again, branch into the details concerning this. Subsequently, call up the item "Worktimes Reported" using and after clicking on the clock icon, select the desired period (e.g. last month, current month). Confirm your selection using Done.

2. Now all the saved working hours and the corresponding activities in the selected time period are listed. If you now wish to present these to the client for signing, then you can correspondingly export and subsequently print the data. For this purpose, call up the menu via and select "Create new timesheet …". A prompt for the desired format will appear – you can select between csv and Excel.

3. Now an email to the current user (yourself in our example) is automatically prepared and the timesheet is included as an attachment. Initiate sending, and you will receive a mail with the corresponding attachment in your Mail Client.

4. You can then open this in Excel, for example, if necessary adjust the standard formatting and either print it out or forward it directly to the client via mail.

Monitoring of project progress (Monitoring Center)

Next, we wish to investigate the progress of the project according to the targets, and if necessary, analyse existing problems. Should problems in a real project actually occur, then as the responsible person for the project, you have to take measures in order to steer the further course of the project in the desired direction and to achieve the planned objectives.

Prior to commencing, we first wish to explain a couple of important terms in case you are not yet familiar with the method of Earned Value Management (EVA).

Pure cost controlling provides only information regarding time and expense, and nothing regarding the factors of results or quality. The central term for EVA is the parameter "Earned Value", which represents the sum of the planned costs for all the tasks / activities completed up until now. MobilePM takes into consideration completely processed tasks and the current work packages according to their completion stage (degree).

The earned value determined is now contrasted with the actual amount of time accrued for this work (Actual Cost). This provides information regarding how cost-consciously your project has been implemented. For clarification, a so-called cost efficiency is created (Cost Performance Index: CPI = Earned Value / ACTUAL costs in %). A value greater than 100% indicates cost savings in your project. A value less than 100% indicates that your project is currently more expensive than planned.

Besides the Actual Cost, a further benchmark should be considered; the planned time consumption (Planned Cost) up to this point in time. The comparison between the Earned Value and the Planned Cost indicates the time compliance of your project. For clarification, a so-called time efficiency is created (Schedule Performance Index: SPI = Earned Value / Planned Costs in %). An SPI greater than 100% indicates that your project is ahead of schedule, but an SPI less than 100% indicates, that your project will run longer than planned.

SPIs and CPIs that are near to 100% indicates that everything is literally running to schedule.

Now take a look at how you are supported by MobilePM for the assessment of your project progress.

1. Select the item "Show project status" in the main menu of your project. MobilePM conducts an earned value analysis based on the existing data and determines all the relevant key figures, which depict the current status of the project.

2. In the Monitoring Center, the current values of all key figures are displayed, e.g. performed and open time expenditure, weighted degree of overall completion, etc. Assure yourself that all these values respectively are in an acceptable range for you. If a value deviates significantly from the nominal value, you should first ensure that all input data, e.g. reported working times, are correct and up-to-date, and subsequently undertake an appropriate detailed analysis.

3. Besides the important EVA values, further information regarding the current project status is summarised, for example:

    a. Who in the team is still actively working or who is still waiting for deployment due to the fact that their tasks are planned at a later stage

    b. Available resources capacity

    c. Status of the work packages and deliverables

4. Should the CPI or SPI deviate significantly from the ideal value of 100%, then it is definitely time to take a look at the details of the implementation. Select the menu item ⬆ "Scheduled tasks" immediately, the individual time efficiencies (SPI) of all tasks which are still in progress are displayed. Values that are either more than 110% or less than 75% are marked red for clarification. If numerous tasks are still open, then you can call up different filters in the menu in order to display those that especially interest you.

5. After having intensively viewed the expired project activities, then select ⬆ "Planned workloads" in order to display those which are planned from tomorrow onwards. The average workloads (overall, weekly and daily) are displayed for every employee who still has tasks that are open until conclusion of the project.
Here the workload (overall, weekly or daily) is shown for every individual employee who still has open tasks.

6. Now check whether anyone is significantly under or over-loaded, whereby the overall or weekly workloads are decisive. The values of the daily workloads are merely for calculation purposes and serve as a reference. For this consideration, filter functions are available with which you can view underload or overload in a targeted manner.

7. As a final step, you can now save the current status of the project progress in the MobilePM local database by selecting the function ⬆ "Save status" in the menu. All the saved data can then be exported at a suitable time in CSV format and is therefore available for further trend analysis in the progression of your project.

Creation of an invoice

Next, you wish to create an invoice for your delivered services. For this purpose, proceed as follows:

1. Please select the contract concerned under Contracts in the main menu and open it.
Now call up the item "Open Invoices" using ⓘ and then the menu ⬆ "Create new invoice".

2. Now provide the invoice being created with a name (e.g. month and name of the project or contract). This is saved using OK.

3. Always one (or several) previously created timesheets serve as a basis for this invoice; therefore these must be allocated in accordance with the invoice: Call up the invoice details using ⓘ , then Timesheets ⓘ and ⬆ "Select timesheets". Now a list of existing timesheets is displayed. Please select the desired timesheet(s) here and accept these by using ⬆ "Save".

4. In order to trigger the calculation of the costs to be charged in the invoice and subsequently to send an invoice via mail, open the detailed view of the desired invoice in the list of the open invoices and then the menu item ⬆ "Generate invoice …". Subsequently, select the desired format (csv, Excel) and initiate sending via email.

   In order to print out the invoice, which is formatted and enriched with all the relevant data for printing, subsequently open the attachment from the email in Excel. If necessary, adjustments can of course be undertaken here.

   Note: In order to define an invoice as having been settled, this must be set from "Running" to "Closed" in the details and subsequently be saved.
   You will receive an overview of the paid invoices under "Settled Invoices". There you can also subsequently reactivate and process invoices via the ⬆ menu.

You have now successfully completed the second tutorial for the introduction to MobilePM, and have gained an initial insight into the basic functions. Since MobilePM still provides numerous further possibilities, we recommend also completing the next tutorial. Here we show you how to add and manage team members, maintain holiday lists, create operational / action plans, directly synchronise or exchange data with one another in WLAN and much more.

Set up of a satisfaction survey

You have completed your project or reached an important milestone. How did it go – was it satisfactory, or it could have been better? MobilePM provides you with the possibility to collect and evaluate feedback from your customers or the persons responsible for the project regarding delivery reliability or the quality of the services provided. You can use this newly gained knowledge to improve or optimise your service provision for the next phases and of course also for further future projects.

MobilePM supports 4 different types of surveys:

- Project Health Check
- Customer Satisfaction Survey

- Delivery Performance
- Deliverable Survey

They enable you to evaluate and assess the results of the project implementation in a targeted manner through third parties. In this tutorial, we take the conventional "Customer Satisfaction Survey" as an example and show you how to create and use such surveys using MobilePM.

1. In the main menu, select the item "Administration" and open the view of existing questionnaires by clicking the ⓘ button behind "Performance Questionnaires".

2. Subsequently, select the item ⬆ "Create new questionnaire" and enter a name for the questionnaire being created. Then close the procedure using OK. The detailed view of the newly created questionnaire opens automatically.

3. Now click the item "Type" ⓘ and then select "Customer Satisfaction" in order to define the type of the newly created questionnaire as "Customer Satisfaction Survey".

4. Now open the list of questions by clicking on ⓘ behind "KPIs", in order to record individual questions.

5. Select the item ⬆ "Create new perf.indicator" and issue a short name or key word as a reference. Subsequently, the detailed view opens automatically for the recording of the question formulation, determination of the respective evaluation scale and the weighting of the question in the overall questionnaire.

6. Comprehensibly and accurately formulate the question in the field "Question" so that it can be clearly answered by the reviewer later. Subsequently, define the evaluation criteria and complete the procedure using ⬆ "Save".

7. Now repeat the same procedure for the remaining questions until the questionnaire is completed. Consequently, you have successfully created your first survey catalogue for recording customer satisfaction and can now use it for gathering feedback on the project.

8. Open the project that is to be evaluated. Select the item "Customer Satisfaction Surveys" ⓘ on the display and subsequently the item ⬆ "Create new survey". In case there is more than one questionnaire of this type, you must select the one that is required. Now you just have to enter a short name for this specific survey and subsequently the detailed view of the survey is opened.

9. Define general information regarding this survey, e.g. evaluation period, reviewer etc. Do not forget to save the changes using ⬆ "Save".

10. In case the reviewer does not have MobilePM in operation, you can print out the empty questionnaire using ⬆ "Print questionnaire" and hand this to the reviewer for evaluation. If the reviewer is also equipped with MobilePM, then you can make this questionnaire available in paperless form as usual by using ⬆ "Send ...".

11. Now open the questionnaire by clicking the button ⓘ behind "Weighted Score". There you can conveniently enter their evaluation regarding the individual questions. Subsequently, save the result using ⬆ "Save".

12. Now a complete questionnaire is available, which can be printed out using ⬆ "Print evaluation" in the detailed view "Performance Evaluation" or passed on to the person responsible for the project for further use.

Use of project templates

1. <u>Creating additional projects</u>

If you wish to create further projects in MobilePM, you can of course always do this as described in Tutorial 1. However, it is easier to use an already existing project as a template and subsequently adapt this according to the situation. This is especially valuable if you have had good experience with a certain project structure in the past and you do not wish to manually recreate this again completely.

1. First, you have to create a template. For this purpose, call up the desired project which should serve as a template from the list of existing project. Now select the item "Options" and subsequently "New project template". In the following dialogue, you can now issue the template with a name.

2. Now return to the overview of the projects and call up the item "Create new project …" in the menu there. In the following prompt, you select "New project

from template" and therefore reach a dialogue selection which offers you a choice of the existing templates.

3. Select the desired template here and confirm this using OK.

4. You now automatically reach the detailed view of the new project. It is recommended to issue this with a new name now, and if required, to undertake the necessary adaptations, e.g. project duration – beginning and end date, responsibility and further options.

TIP: Under the item "Administration" in the main menu, you will find an overview of all existing templates under the item "Project templates". You can edit the template in the respective detailed view (e.g. the WBS definition, i.e. adapt the individual phases and activities) or define the currently open template as a default - standard selection - via the menu.

In cooperation with business partners, MobilePM will also publish standard templates in the future for different project types based on established projects in order to support you as well as possible with the set-up of your projects.

Naturally, you can also commission us with the creation of an individual - tailored to your requirements - template. For this purpose, please contact us in writing – we will happily provide you with an appropriate offer.

(The Tutorial was created by Oliver Knappe in cooperation with MobileLifeDesign)