




T5 – Action Planning including Vacation and Public Holidays


In the next step we will take a look at the subject of action planning. The aim here is to ensure that the contributors assigned in the specified period of the project will also be able to complete the scheduled tasks.


As a first step it is recommended to define the public holidays in the system on which no work is performed. This must still be performed individually since MobilePM is used in various countries. It is planned to provide appropriate collections of public holidays for downloading in the future.

1. Select the "Holidays" entry in the main menu, followed by  and then "Create new holiday plan". Define a name for the plan – e.g. Holidays 2014 – and save it with OK.
2. The "Holidays 2014" plan just created will open automatically. Select the "Public holidays" entry by pressing the  button. Then choose  "Plan holidays ..." followed by "Add new holiday". Enter the name of the public holiday (e.g. German Unity Day) and the corresponding date. Add saves the public holiday appropriately.
3. You can now specify and save all the public holidays that are relevant for you in order to complete this step.




Note: Alternatively, each public holiday can be entered manually as vacation for each contributor. However, in that case no difference will be made between a public holiday and vacation.

Individual vacation planning is now performed on the basis of public holiday planning. We will first copy the "Holidays 2104" plan we have just created as the basis for the vacation plan in order to ensure that it contains the free public holidays. Please proceed as follows:



1. Select entry "Holidays" from the main menu again and highlight the "Holidays 2014" plan via pop-up menu (hold pressed for 1-2 s). Please select "Copy" from the pop-up menu and enter a new name for the vacation plan (e.g. contributor's name with the relevant year).
2. The next step involves specifying for which contributor this vacation plan is to apply. To do this, select the "Contributor" entry by pressing the  button and assign the contributor concerned. (If you followed our advice concerning the name of the vacation plan, you can simply select the corresponding contributor).
3. You can now repeat this step for all contributors. In practice each contributor will generally create his/her own vacation plan with his/her own version of MobilePM and send this to the person responsible. (See next section for more details).


4. Open the newly created vacation plan. Note: the "Begin" and "End" fields here do not indicate the beginning and end of the vacation but represent the period of validity of the plan (e.g. 01/01/2014 – 31/12/2014). You enter the actual vacation period under entry "Private vacations", followed by  "Plan holidays ..." and "Add new holiday ...". This is where you can input a name (e.g. "Summer holiday") together with the beginning and end of the vacation, with the field "Location" being used to indicate the place (for information purposes only).
5. The detailed view of the vacation plan under entry "Private vacations" will now display the number of days of vacation and public holidays that have been entered.

We now come to actual action planning, i.e. determining which contributors are available for the project and when.

1. We first create a new action plan. To do this, please open the project via "Projects" in the main menu and select the "Action plans" entry by pressing the  button. Now select  "Create new action plan", enter a name for the action plan and then confirm with OK.
2. The newly created action plan will open and will be assigned to the current user. However, you can assign it to a different contributor via the "Contributor" entry.
3. The working days for this contributor must then be specified. This is effected using the "Workdays" entry. Select  "Plan working days ..." and "Generate default plan" to automatically accept all the days that are not defined as public holidays and on which the assigned contributor has no vacation in accordance with the previously specified vacation plan as working days.
4. If you subsequently wish to take vacation on a day scheduled as a working day, you can specify this quite simply. Open the relevant action plan and select the desired day. You can use "Move" via the pop-up menu to add the day in question to the relevant vacation plan. Both plans (the open action plan and the vacation plan) will be updated immediately.




This completes the actual action planning. You now wish to check the workload of the contributors while the project is running in order to make any necessary adjustments to the plan:

1. To do this, open your project again in the main menu and select  "Show Project Status" followed by  "Planned Workloads". You will see the resources within the project where workload (resulting from assigned activities and their budget) exceeds 110%. The working days affected are displayed below the resource in question.




2. Using the  menu, you can call up various other views (e.g. workload less than 75% etc.), archive the current workload or send it as a CSV file.

You have now set up the initial project and now wish to send it to the contributors involved. (Each contributor must of course have MobilePM and, in our example, be located in the same WiFi network in order to share data. However, it is also possible to distribute data by other means – e.g. via e-mail)




Each contributor first receives the data relating to the resources involved in the project:

1. To do this, select the project entry "Staffing",  "Send list ..." and "Publish via Bonjour". You can assign a password in order to protect the data. The data are now published in the local WiFi network.
2. The contributors can now launch MobilePM on their iPhones and select the "Sharing Service" entry in the main menu. A file with the name "SID: BOL.XXXX" will now be displayed. The  button can be used to display what the content of the file is. In our example this is "Contributors". Clicking on  again will import the data.

In the next step the project plan is distributed:

1. For this purpose, open the  "Options" in the project view followed by "Send ..." and "Publish via Bonjour". The rest of the process is identical to distributing the resources.
2. The contributors again select the "Sharing Service" entry from the main menu. An additional file called "SID: PRJ.XXXXX" will be displayed. Clicking on  shows that this time it is a project. Another click on  displays the prompt asking whether synchronization ("Synchronize") or copy should be performed. In our example the contributors should select "Synchronize". The project will now also be imported.

The action plans are now transferred:

1. Select the entry "Action plans" in the main menu. All the action plans available in the project will be displayed. Select the individual plans that are then to be distributed. Select  "Send list ..." and "Publish via Bonjour". The rest of the process is identical to distributing the previous objects.
2. The contributors again call up the sharing service, where they now see an additional entry "SID: BOL.XXXX". Clicking on  shows that this time the action plans are involved. Another click on  imports these data, as well.
3. Finally, the vacation plans can be transferred so that the contributors can maintain them for themselves from now on – the process is the same as for publishing the action plans.


Each contributor must work through steps 5-10 of Tutorial 1 in order to register with the project as active user. All contributors then have the possibility to make their contribution to the project and can, for example, update the progress of the tasks assigned to them on a regular basis.

In order to maintain an overview of the current progress of the project, data should be synchronized regularly (it is advisable to have an internal understanding agreed by the team – e.g. Friday). This means that each contributor makes his/her data available and imports the current status of colleagues to his/her iPhone. In this case it is important to accept the value with the latest change date where values vary (e.g. the degree of completion of an activity)

Since not all contributors can be present in the same WiFi network for data synchronization, distribution can of course be effected by e-mail, too. For this purpose please select the "Send via email" at the relevant point.

TIP: It is best if all team members send their data to the project manager/team leader, who then updates the current status before distributing this to the members.

A major application for data exchange is, for example, the transmission of hours worked to the person responsible (e.g. project manager). For this reason we wish to explain this briefly, too

1. The contributor has already entered his/her hours worked and generated a timesheet as described in Tutorial 2.
2. This is now to be communicated to the person responsible. To do this, the contributor selects the "People" entry in the main menu, followed by "Contributors" and then himself/herself. Select the desired timesheet (i.e. job ticket) under "Timesheets", select the despatch route (e.g. e-mail) in menu , the desired format (e.g. Archive.mpm, since this format is intended for import and then send it by e-mail to the person responsible.
3. The person responsible accesses the relevant e-mail, selects the attachment and selects "Import". The file is then imported into MobilePM and the values are updated accordingly.
4. An overview of the worktimes booked in the project can be called from the project via the "Worktimes reported" entry.

As you can see, MobilePM is a very comprehensive application that can be of great assistance to you in all aspects of your day-to-day project work. Through the use of an iPhone, MobilePM is available to you in all places and at all times regardless of whether you are currently in the office or on a plane. You have permanent access to your projects and their status and can update them when required at any time.

Would you like even more mobility for your day-to-day projects? Then send us your ideas on how we might extend the functionality to: suggest@mobilelifedesign.com or use the MobilePM function that allows you to conveniently capture your ideas:

1. Select the "Bug Report" entry in the main menu. Then tap on the "Report a bug" row and select "Suggest new function".
2. You can now describe your idea in as much detail as possible. You can generate a corresponding e-mail with "Send" that you can then check and, if necessary, attach additional documents to.
3. On receipt of your idea, the relevant department at MobileLifeDesign GmbH will examine the benefit this requirement would offer to all users in general and whether it is technically feasible with a reasonable amount of effort. If a positive decision is made, you will receive feedback informing you about which release we are planning to implement it in or make it available

We would be delighted to receive any suggestions from you.

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