



# **ix** PROJECT MANAGEMENT

UNITED PLANET INTREXX XTREME  
RELEASE 4.5

**Table of Contents**

<b>1. Licensing</b> .....	<b>5</b>
<b>2. Configuring Portlets in the Application Portal</b> .....	<b>5</b>
<b>3. Configuring the Time Recording Portlet on the Portal Start Page</b> .....	<b>6</b>
<b>4. Administration</b> .....	<b>7</b>
4.1. Administration Tab .....	7
4.2. General Settings Tab .....	10
4.2.1. Automatic Settings .....	11
4.2.2. Reports .....	11
4.2.3. Miscellaneous .....	11
4.3. Resources Overview Tab .....	12
<b>5. Rights</b> .....	<b>12</b>
5.1. Pages .....	13
5.2. Data Groups .....	14
<b>6. Creating a Project</b> .....	<b>14</b>
<b>7. Project Details</b> .....	<b>17</b>
<b>8. Portlets</b> .....	<b>21</b>
8.1. Portlet MNG .....	21
8.2. Portlet PM .....	22
8.3. Portlet ST .....	22
<b>9. Tasks</b> .....	<b>23</b>
9.1. Entering a Task .....	23
9.2. Changing the Status of a Task .....	24
9.3. Delegating Tasks .....	26
<b>10. Time Recording</b> .....	<b>26</b>
10.1. Time Recording Portlet .....	26
10.2. Manually Recording a Time Expenditure .....	27
<b>11. Entering a Receipt</b> .....	<b>27</b>
<b>12. Reports</b> .....	<b>28</b>
12.1. Comprehensive Project Reports .....	28
12.1.1. Plan Status .....	29
12.1.2. Plan Status with Tasks .....	30
12.1.3. Status – Actual .....	30
12.1.4. Status – Actual with Tasks .....	30
12.1.5. Plan – Actual Comparison .....	30
12.1.6. Plan – Actual Comparison with Tasks .....	31
12.1.7. Groups of Tasks - Plan .....	31
12.1.8. Groups of Tasks - Actual .....	31
12.1.9. Groups of Tasks with Tasks - Plan .....	32
12.1.10. Groups of Tasks with Tasks - Actual .....	32
12.1.11. Milestones .....	32
12.1.12. Tasks Not Yet Begun .....	33
12.1.13. Tasks in Progress .....	33
12.1.14. Closed Tasks .....	33
12.1.15. Resource Costs .....	33
12.1.16. Resource Costs with Tasks .....	34
12.1.17. Resource Costs with Tasks and Expenditures .....	34
12.1.18. Cost Overruns .....	34

12.1.19. Cost Overruns with Tasks..... 34

12.1.20. Who-does-what ..... 35

12.1.21. Overused Resources ..... 35

12.2. Project-related Reports ..... 35


    12.2.1. Milestones ..... 36



    12.2.2. Resource Costs ..... 36

    12.2.3. Resource Costs with Expenses ..... 36







**13. Who-does-what ..... 37**

### Writing Conventions



In this handbook, text passages will be displayed in *italics* when they refer to settings in the displayed dialogs. Menu items that are available in context menus can, in addition, always be selected from the main menu. Main menu items will not be described if they are not available in the context menu. A description of the general main menu items can be found in the  *Center* handbook. Programming code in the text will be displayed in the Courier font.

In the following, *<xtreme>* refers to your Intrex installation path; under Windows, for example, this is usually  *C:\xtreme\*. On Linux, the normal install path is  */opt/xtreme/*. Context menus can be opened by clicking with the right mouse button on the described element.

The following symbols will be used for designation of special kinds of information:

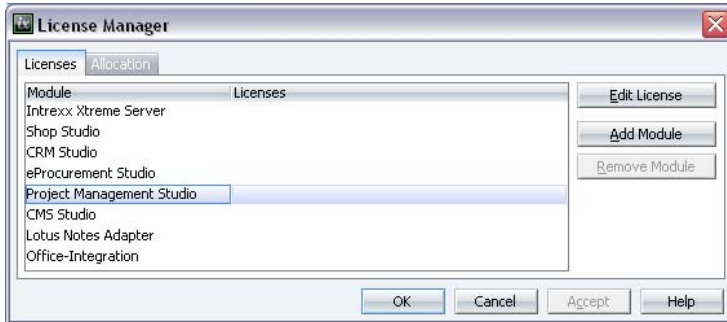
-  Important information
-  Tips and background information
-  References to additional information in an Intrex Xtreme handbook
-  Directories
-  URLs
-  Buttons in dialogs or assistants

### Previous Knowledge

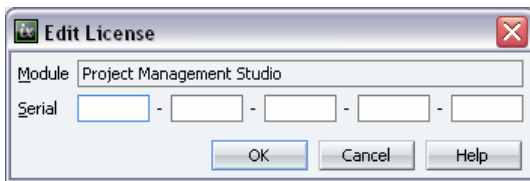
In order to understand this documentation, no special previous training is necessary. You can find helpful information in the Intrex Xtreme handbooks  *Center* and  *Application Designer*.

**1. Licensing**

The Project Management Studio, like all Intrex Xtre applications, created from a template. You will find the *Project Management Studio* template in the Template Manager, which you can reach from the Application Designer. In order to use the application, you must purchase a license. Please request a license from your software partner or from United Planet via the eMail address [info@unitedplanet.de](mailto:info@unitedplanet.de). The license key will be sent to you via eMail. In order to unlock the template, please run the Intrex Xtre Portal Manager. Open the license manager from the menu *Extras / License Manager*.

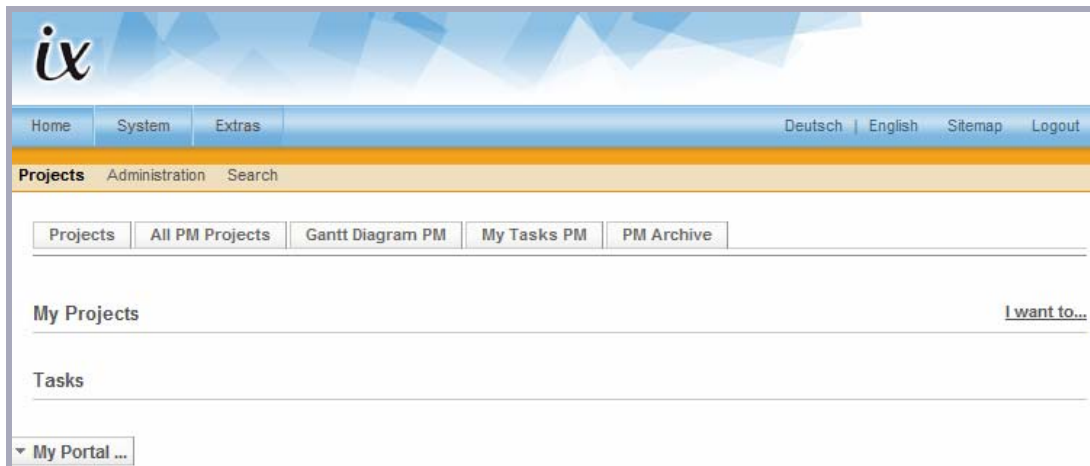


Select the *Project Management* entry and then click *Edit license*.



Enter your serial number here and then click *OK*. Project Management has now been released for use.

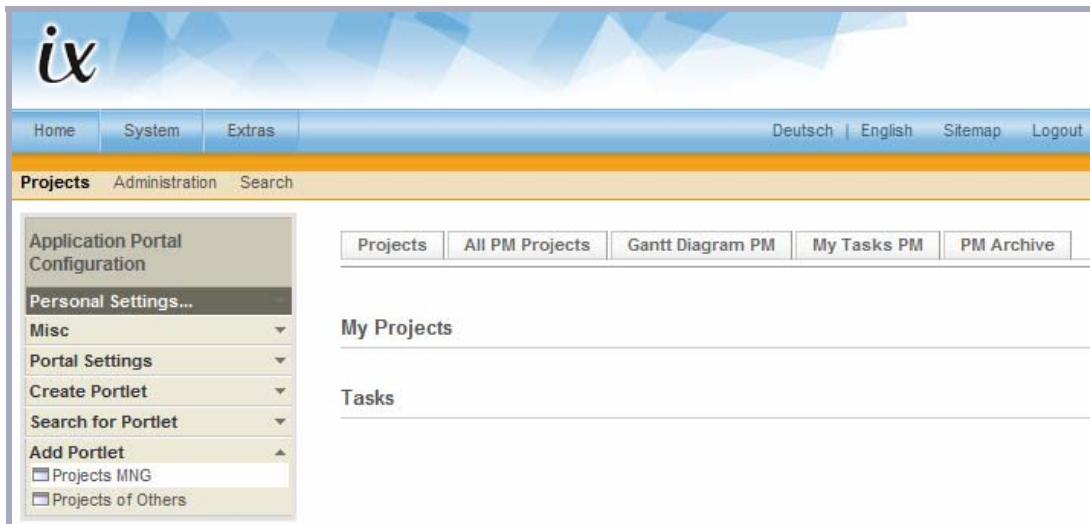
**2. Configuring Portlets in the Application Portal**



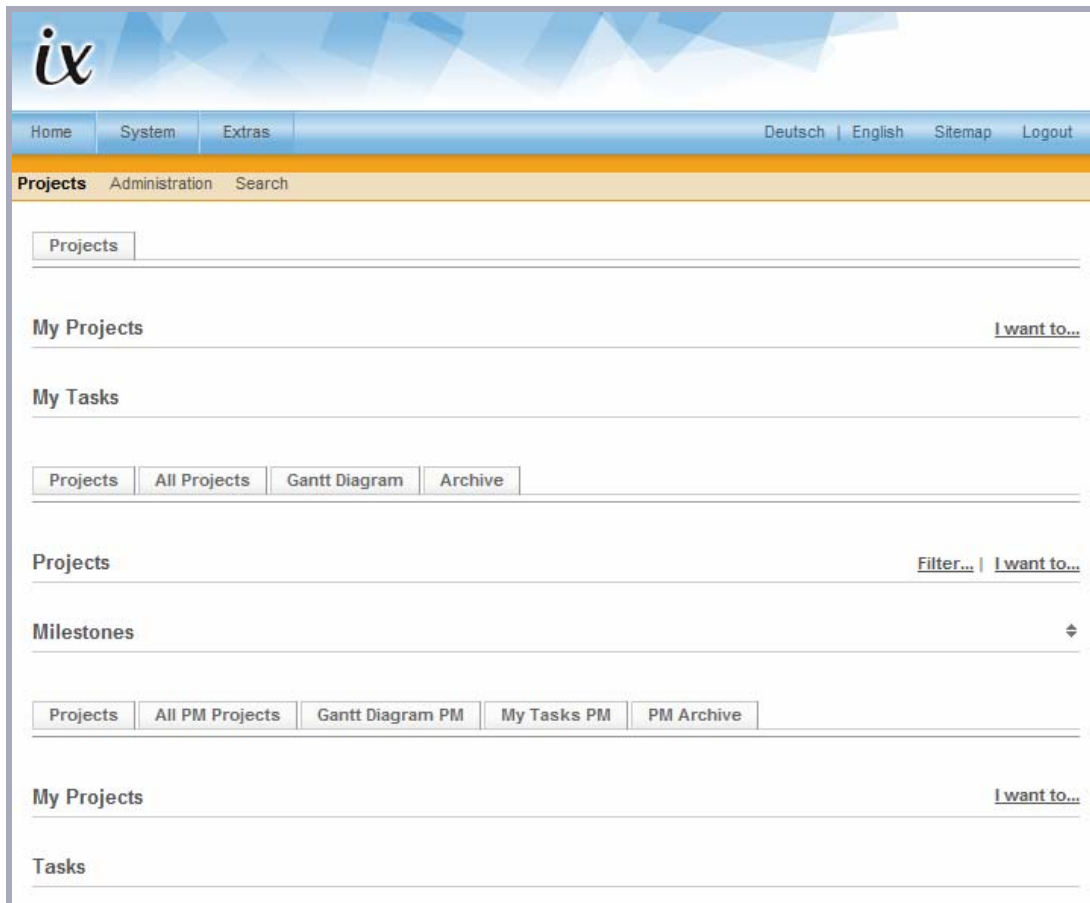
The homepage of Project Management is a portal page. If you call up Project Management in the browser and are logged on as an administrator, you will see the portlet *PM Projects* here. Project Management contains three predefined portlets, with which the view of project information can be controlled in relation to the user:

- Projects MNG (view of all current projects)
- Projects PM (view of all projects of project managers)
- Projects of Others (view of tasks for projects to which the employee has been assigned)

Show the additional portlets by clicking the link *My portal* at the foot of the page. There, select the *Add Portlet* menu item.



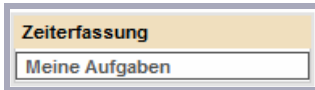
Insert the portlets *Projects MNG* and *Projects of Others*.



All portlets will now be shown in order on the start page. Now switch to the main portal page.

**3. Configuring the Time Recording Portlet on the Portal Start Page**

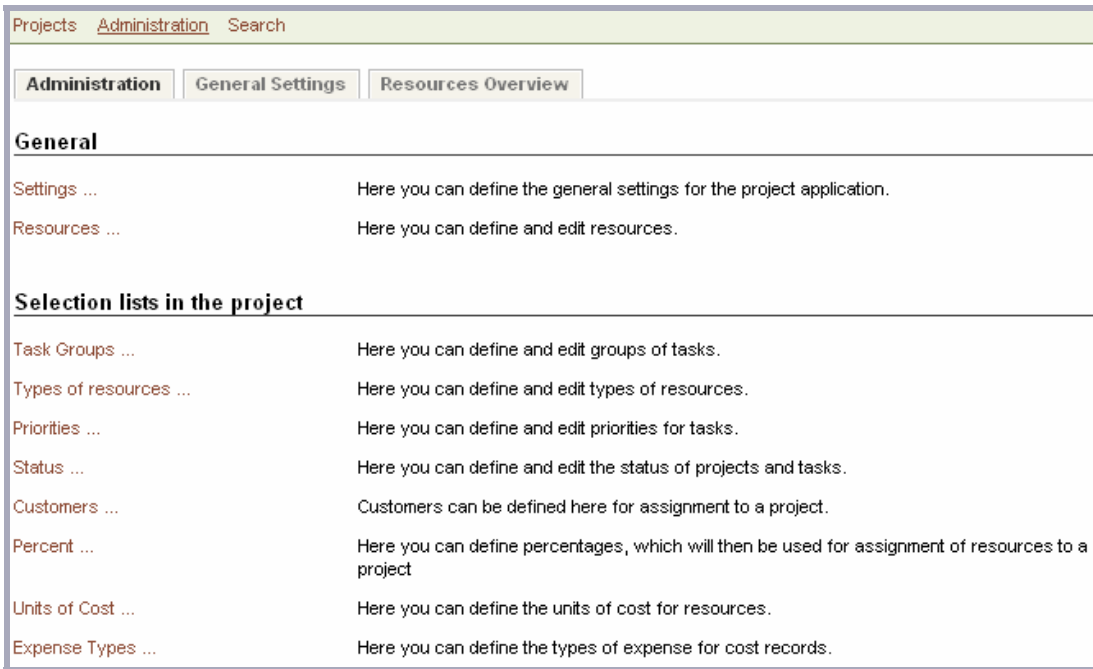
The time recording portlet allows the time expended on a task to be entered in a comfortable manner. Click on the link to *My Portal* at the foot of the main portal page, then add the time recording portlet to it.



In this, proceed exactly as before when you integrated additional portlets to the homepage of the Project Management application.

You can find helpful information on portlet configuration in the [Portal and Portlets handbook](#). The portlet should now be displayed on your main portal page as shown above. Switch back to the Project Management application and then go to the *Administration* menu.

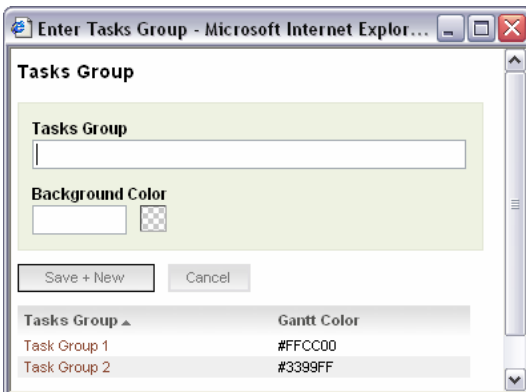
#### 4. Administration



##### 4.1. Administration Tab

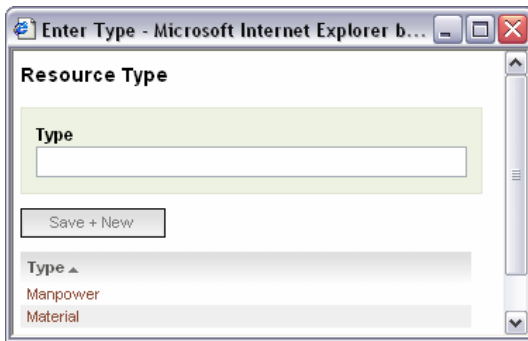
The links *Settings* and *Resources* serve as quick links to the tabs *General Settings* and *Resources Overview*. In the area *Selection Lists in the Project*, entries in selection lists to various edit pages in Project Management will be managed.

##### Tasks Group



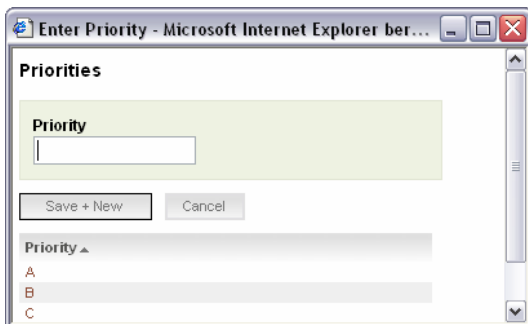
Tasks can be put into categories with tasks groups. Each tasks group can be assigned an individual color for its display in the Gantt diagram. If you wish to change an existing tasks group, please click the corresponding link in the *Tasks Group* table column. Save any changes by clicking [OK + New](#).

### Resource Types



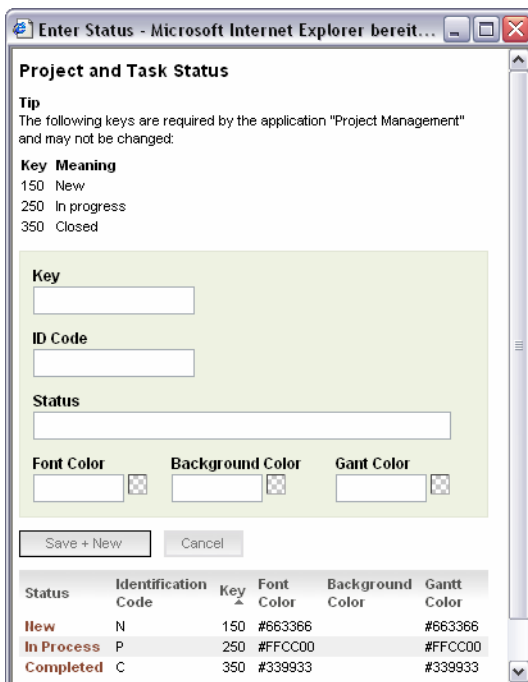
You will manage types of resources here by assigning categories to resources.

### Priorities



Define priorities for tasks here.

### Status

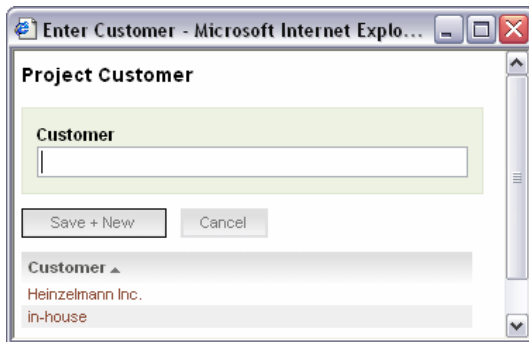


Statuses defined here will manage the progress of tasks and/or the progress made on the entire project. The keys for the three statuses *New*, *In progress*, and *Completed* cannot be changed. However, it is possible to add additional status steps to the list. When entering a new status, please take note of the following status ranges in order to assign it a rank that makes sense:

- New* -> Key 150 (validity range 125-174)
- In Progress* -> Key 250 (validity range 225-274)
- Completed* -> Key 350 (validity range 325-374)

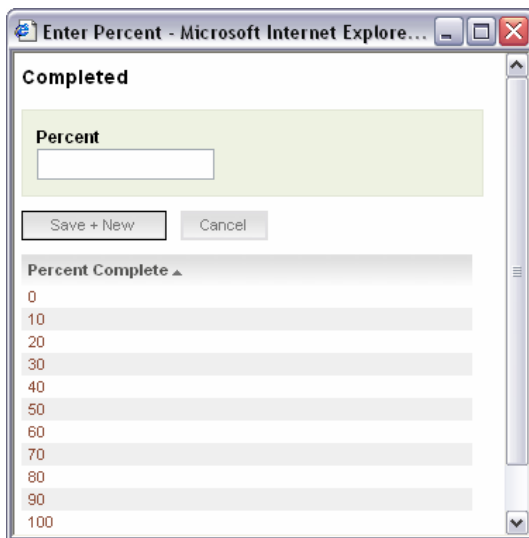
*Open* -> Status below 275  
*Completed* -> Larger than/equal to 325

**Customers**



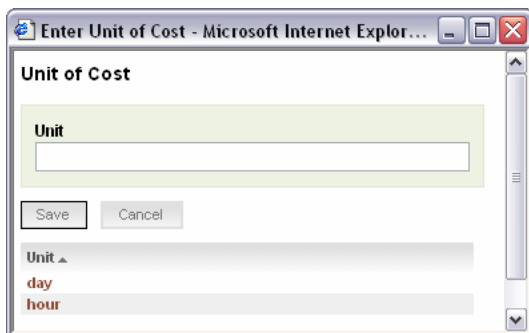
Projects can be assigned to customers entered here. For internal projects, use the customer *Internal*.

**Percents**



The assignment of a resource to a project will be set here as a percentage.

**Units of Cost**



Define the units of cost for the use of resources on tasks here.

## Expense Types

Types of receipts for recorded receipts will be managed here.

### 4.2. General Settings Tab

**Administration** | **General Settings** | Resources Overview

**Automatic Scheduling**

- Task Moves Project Begin**  
Moves forward project begin.
- Task Moves Planned Project Begin**  
Moves forward planned project begin.
- Task Moves Planned Project End**  
Moves back planned project end.
- Time Recording Moves Project Begin**  
Moves forward starting date of a project.
- Time Recording Moves Current Project Status**  
Moves back date for last change to a project.
- Time Recording Moves Task Begin**  
Moves forward starting date of a task.
- Time Recording Moves Current Task Status**  
Moves back date for last change of a task.
- Sum Costs and Times**  
Sums Entered Expenses Automatically for Project and Task.
- Expense Entry Raises Project Status**  
Upon entry of an expenditure, the project status will be raised to the defined value.  
Status Key:
- Expense Entry Raises Task Status**  
Upon entry of an expenditure, the task status will be raised to the defined value.  
Status Key:

**Reports**

- Show Archived Projects
- Show Closed Projects

**Miscellaneous**

**Currency**  
 ▼

#### 4.2.1. Automatic Settings

The *Automatic Settings* area will allow you to define whether the starting and/or ending date of newly created or changed tasks and time recordings will affect the beginning or end of a project.

##### **Task moves project start**

Tasks whose starting date lie before the beginning of the project will move the project begin date to the start date of the task with this setting.

##### **Task moves planned project start**

Tasks whose starting date lie before the starting date of the project will move the planned project begin to the start date of the task with this setting.

##### **Task moves planned project end**

Tasks whose ending date lie after the project end will move the planned project end to the ending date of the task with this setting.

##### **Time recording moves project start**

Time recordings whose starting dates lie before the starting date of the project will move the project start date to the start date of the time recording with this setting.

##### **Time recording moves current project status**

Time recordings whose ending dates lie after the date of the last change to the project will move the date for the last change to the project to the ending date of the time recording with this setting.

##### **Time recording moves task start**

Time recordings whose starting dates lie before the starting date of a task will move the start date of the task to the start date of the time recording with this setting.

##### **Time recording moves current task status**

Time recordings whose ending dates lie after the date of the last change to a task will move the date of the last change of a task to the end date of the time recording with this setting.

##### **Sum costs and time**

Adds together recorded expenditures for projects and tasks.

##### **Cost recording increases status of project**

When entering expenditures, the project status will be raised to the defined value. The standard value is *250*, which corresponds to a status of *In Progress*. When entering an expense, the status of the project will automatically be set to *In Progress*.

##### **Cost recording increases the status of a task**

When entering expenditures, the task status will be raised to the defined value. The standard value is *250*, which corresponds to the status *In Progress*. If an expense is entered for a new task, the status of the task will automatically be set to *In Progress*.

#### 4.2.2. Reports

##### **Show archived projects**

This setting will cause archived projects to be included in all reports.

##### **Show completed projects**

This setting will cause completed projects to be included in all reports.

#### 4.2.3. Miscellaneous

The currency for recording costs in projects will be defined here. Select the desired currency from the selection list. By clicking  *OK*, all settings will be saved.

### 4.3. Resources Overview Tab

All project resources will be managed on this tab. Via [Enter resource type](#), a new type of resource can be entered. Clicking the [Filter](#) link allows you to filter the table by types of resources. A new resource will be entered by clicking [Enter resource](#).

In the *User import* field, you can search for users that have been entered in the User Manager for the portal. If you leave all fields blank here and click *Search*, the complete list of all users will be shown, from which you can select a user. The fields *ResourceID*, *Resourcenname*, *ID*, and *eMail* will be automatically filled.

Define the type of resource via the selection list *Type*. Click the **+** icon to enter a new type of resource directly to the list. The field *Cost per unit* allows you to enter costs that arise from each recorded unit. Select the type of unit (*Hour*, *Day*) from the selection list *Unit*.

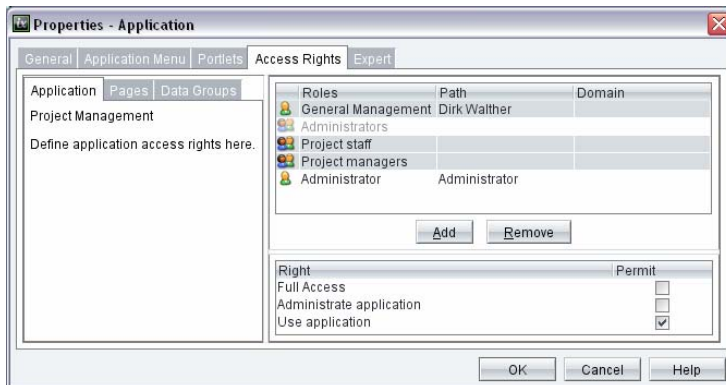
### 5. Permissions

For Project Management, users will be divided into three groups with different access permissions:

- Members of the general management

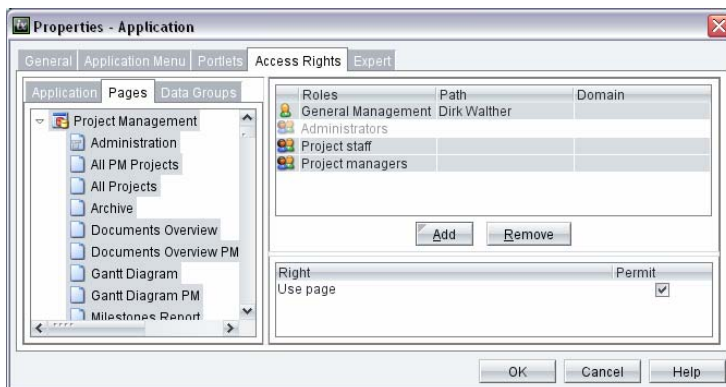
- Project managers
- Project staff

For these groups, you can set up user groups or positions in the User Manager. First, assign all groups the permission to use the application.



Access to all pages of Project Management can also be assigned to all groups now.

### 5.1. Pages

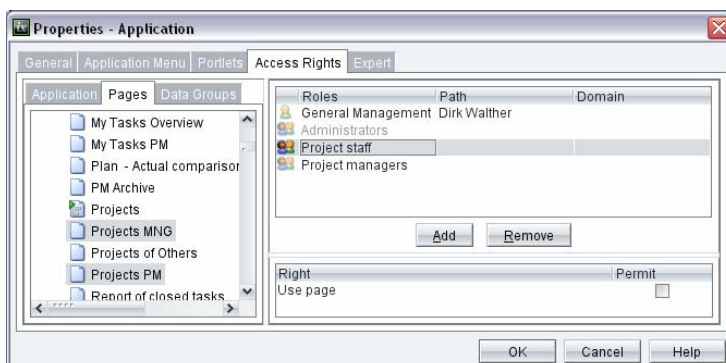


The Project Management application contains three predefined portlets, with which the viewing of project information can be controlled with respect to users:

- Projects MNG (View all running projects)
- Projects PM (View individual projects of project managers)
- Projects ST (View of tasks for projects to which the employee has been assigned)

Please remove all corresponding permissions to which you wish to deactivate:

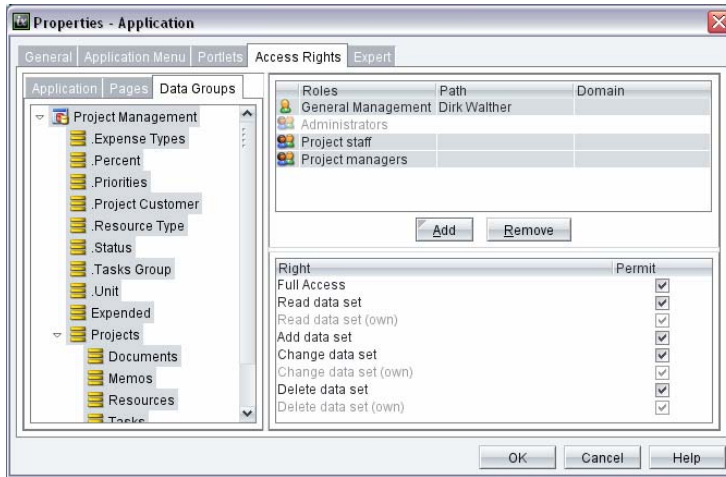
- General Management – no access to the pages *Projects PM* and *Projects of Others*
- Project manager – no access to the pages *Projects MNG* and *Projects of Others*
- Project staff – no access to the pages *Projects MNG* and *Projects PM*



Only users that are allowed to change administration data should be given access to the *Administration* page. Deactivate the page permission for all other users. Project staff should not be able to view or change project details. Deactivate the permission to *Use Page* for the *Project* page in the *Projects* data group. In order to prevent project staff from delegating tasks, deactivate the page permissions to the *Delegate* page in the data group *Projects / Tasks*. Deactivate the page permission for staff as well to the pages *Search* and *Administrate Documents* (data group *Projects / Documents*).

**5.2. Data Groups**

First, assign full access to all data groups to all groups.



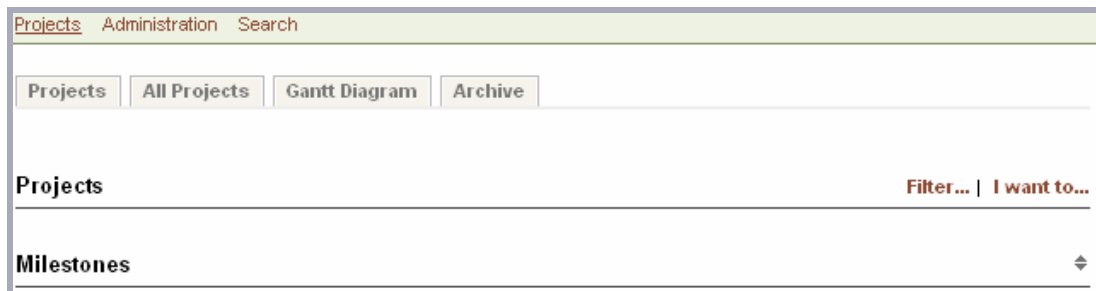
Full access must later be restricted to administration data. Activate for the following data groups only the permission to *Read data record* for all users that should not be allowed to change administration data.

- Tasks group
- Expense types
- Priorities
- Project customer
- Percent
- Resource type
- Status
- Settings - AppProps
- Resources pool

Administration data can now no longer be changed, and will now only be available for selection in selection lists. In order to restrict the editing of tasks by project staff, assign them only the permission to *Read data set* to the *Tasks* data group in the *Projects* data group.

**6. Creating a Project**

If a member of the management is logged onto the portal, a project of the management can be created. On the start page, you will see the portlet *Projects MNG*.



Here, click on the link *I want to...*

<b>Compose</b>
Create a new project
<b>Overviews</b>
See an overview of tasks
See an overview of reports
See an overview of documents
See an overview of time expended
See an overview of receipts

Select the menu item *create a new project* here.

**Project Creation Assistant**  
**Project data - Resources - Tasks - Miscellaneous**  
 Step 1: First, enter the data for the new project. When you are done, click "Next".

<b>Project Number</b>	<b>Description</b>	
1	Project of the General Management	
<b>Customer</b>		
in-house		
<b>Status</b>		
New		
<b>Plan</b>		
<b>Start</b>	<b>End</b>	<b>Costs</b>
2006-10-16	2006-11-16	10.000,00 EUR

Next      Cancel

Enter a *Project number* and the *Title* of the project here. In the *Customer* selection list, select the customer relating to the project. For internal projects, please use the entry *Internal*. The *Status* of a new project will automatically be entered as *New*. Enter the planned starting and ending date of the project and its planned *Costs*. When you are finished, click *Next*.

**Project Creation Assistant**

Project data - **Resources** - Tasks - Miscellaneous

Step 2: Define the required resources for the new project here. To continue, click "Save" to save an additional resource, or "Next" to move on.

**Distribute Resource**

Roman Herder

**eMail**  
Roman.Herder@coffeexpress.com

**ID Code**  
Roman.Herder

**Distribution (in %)**  
100

**Description**

Back Save Next Cancel

Resource	Costs Per Unit	Percent
Sabine Betz	150,00	100

Select a resource that will be used for the project. The fields *eMail*, *ID*, and *Description* will be automatically filled with data from the administration. Select the *Assignment (in %)* to define the percent of the resource that will be assigned to the project. Next, click *Save*. The resource will now be shown in the table below the edit fields. As long as you do not click *Next*, you can assign additional resources.

**Project Creation Assistant**

Project data - Resources - **Tasks** - Miscellaneous

Step 3: Define tasks for the new project here. To continue, click "Save" to save the task, or "Next" to move on.

**Task**  
Task Sabine Betz  Milestone

**Tasks Group**  
Task Group 2

**Priority**  
B

**Resource**  
Sabine Betz

**Status**  
New

**Plan**


**Start**  
2006-10-16 12:00 PM

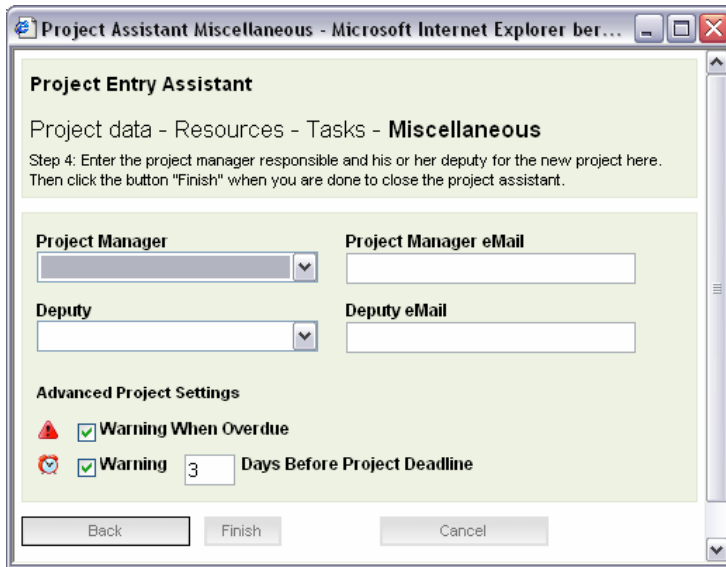
**End**  
2006-11-15 12:00 PM



Back Save Next Cancel

Milestone	Task	Start	End
<input checked="" type="checkbox"/>	Task Roman Herder	2006-10-19	2006-10-19

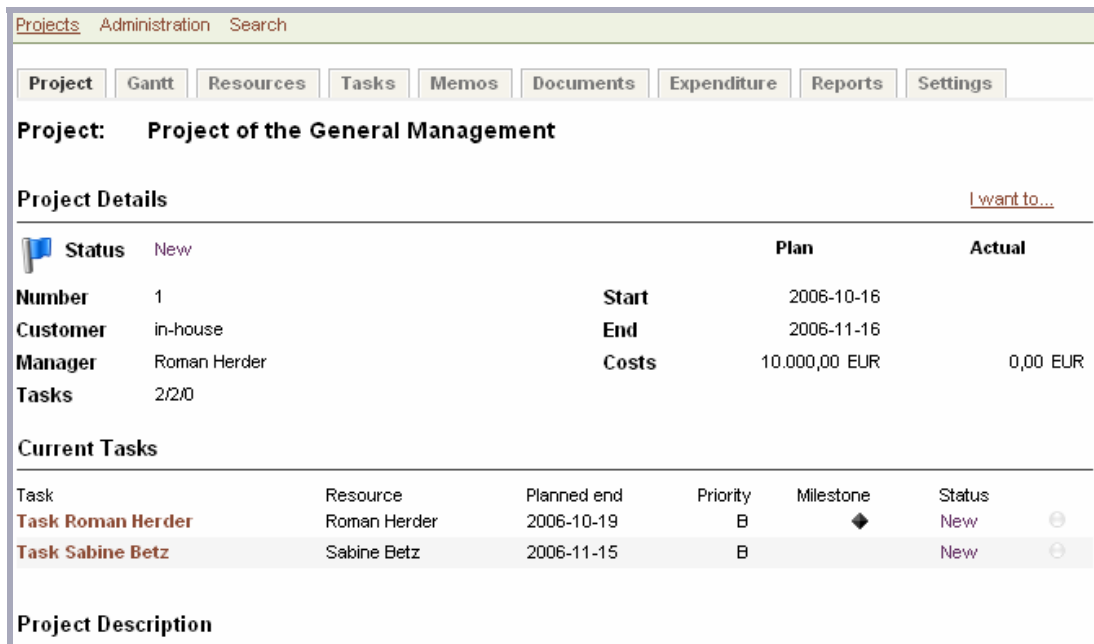
Here you can enter multiple tasks as long as you do not click *Next*. Enter a short description of the task in the *Task* field. With tasks that are marked as *Milestones*, no starting date will be entered. Next, select the *Tasks group* from the selection list. In the *Priority* selection list, you can select the priority of the task. Assign a *Resource* to it. When

entering a new task, the status will automatically be entered as *New*. Enter a *Start* and *End date* for the task. Then click  *Next*.



Assign a project manager and a substitute. With the setting *Warning on delay*, the project will be shown on the start page and the view page of project details with a  icon if the end date passes without being completed. Click  *Finish* to complete creating the new project, which will then be shown in the management portlet.

7. **Project Details**  
**Project Tab**



Project Details				Plan	Actual
<b>Status</b>	New				
<b>Number</b>	1	<b>Start</b>		2006-10-16	
<b>Customer</b>	in-house	<b>End</b>		2006-11-16	
<b>Manager</b>	Roman Herder	<b>Costs</b>		10.000,00 EUR	0,00 EUR
<b>Tasks</b>	2/2/0				

Task	Resource	Planned end	Priority	Milestone	Status
Task Roman Herder	Roman Herder	2006-10-19	B	◆	New
Task Sabine Betz	Sabine Betz	2006-11-15	B		New

On this tab, you will see all details for the project. The planned starting and ending date and all costs are entered on the *Plan* column. All costs accrued in the progress of the project that have been entered via receipts or time recordings will be summed on the *Actual* column. The *Tasks* lines (in the example, *2/2/0*) will inform you of the

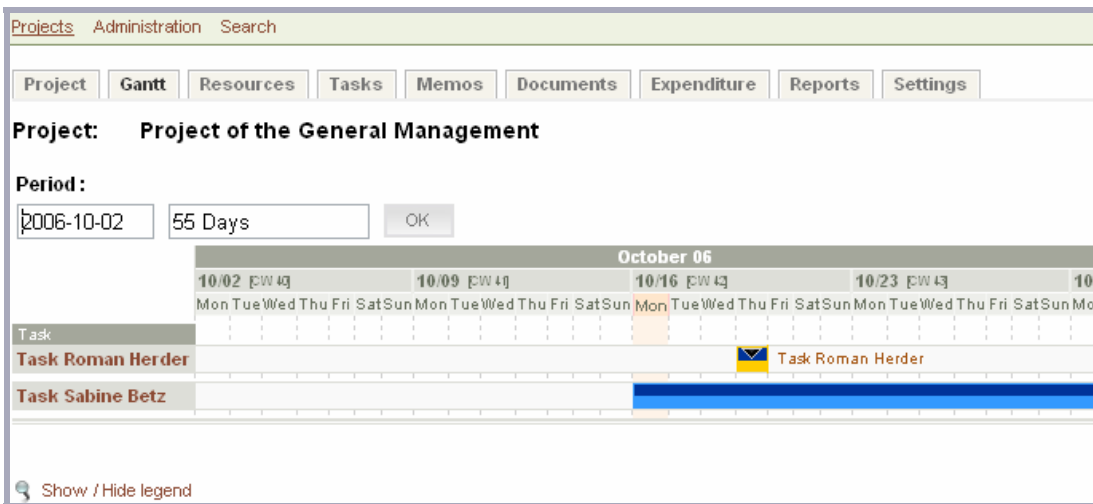
- Sums of all tasks
- Number of open tasks
- Number of overdue tasks.

In the *Actual* column, the actual costs and start and end date will be shown. The table *Open Tasks* will show all incomplete tasks. Clicking on a link to a task will open the task for editing. You will be notified of overdue tasks in the last column. The link *I want to...* will allow you to *Change* and *Delete project data*.

<b>Change</b>
Change the project details...
Change the project description...
Archive project...
<b>Compose</b>
Enter a task...
Enter a memo...
Enter a time record...
Enter an expense...
<b>Overviews</b>
See an overview of reports...

The menu item *Archive the project* allows completed projects to be sent to the archives by clicking *Archive*. Archived projects are available on the start page via the *Archive* tab. They can be reactivated at any time.

**Gantt Tab**



On this tab, all project tasks will be displayed graphically. The current day will be accentuated in color. If the mouse cursor is placed over a task, its details will be shown as a quicktip. If you enter a date in the *Timeframe* field, the chart will show the number of days from this date that you enter in the second field. The blue bar in the upper area of a task will display the planned length of the task. The bar underneath it will show the tasks group to which the task belongs. For tasks that are in progress, the bar for the actual status of the task will be shown. Clicking the link to *Show / Hide legend* will show the legend.

<b>Tasks Group</b>	<b>Bars: Plan</b>	<b>Bars: Actual</b>
(Default)	(Default)	(Default)
Task Group 2		New
Task Group 1		

### Resources Tab

The screenshot shows the 'Resources' tab for 'Project of the General Management'. It includes a navigation bar with 'Project', 'Gantt', 'Resources', 'Tasks', 'Memos', 'Documents', 'Expenditure', 'Reports', and 'Settings'. Below the navigation bar, there is a link to 'Assign a new resource ...' and a table listing resources.

Name	Distribution	Costs	Unit	Type
Sabine Betz	100	150,00	hour	Manpower
Roman Herder	100	150,00	hour	Manpower

On this page, all resources will be shown.

### Tasks Tab

The screenshot shows the 'Tasks' tab for 'Project of the General Management'. It includes a navigation bar with 'Project', 'Gantt', 'Resources', 'Tasks', 'Memos', 'Documents', 'Expenditure', 'Reports', and 'Settings'. Below the navigation bar, there is a link to 'Enter New Task ...' and a table listing tasks.

Task	Planned Start	Planned End	End	Resource	Priority	Milestone	Status
Task Roman Herder	2006-10-19	2006-10-19		Roman Herder	B	◆	New
Task Sabine Betz	2006-10-16	2006-11-15		Sabine Betz	B		New

On this page, all project tasks will be shown.

### Memos Tab

The screenshot shows the 'Memos' tab for 'Project of the General Management'. It includes a navigation bar with 'Project', 'Gantt', 'Resources', 'Tasks', 'Memos', 'Documents', 'Expenditure', 'Reports', and 'Settings'. Below the navigation bar, there is a link to 'Enter new memo ...'. The main area contains a form with a 'Subject' field, a 'Description' field, and an 'eMail - Recipients' section with 'OK' and 'OK + eMail' buttons. A 'Filter...' link is at the bottom.

On this page, project memos can be entered. Clicking the link to *Enter a new memo* will show the entry fields. If you click the *eMail Recipients* link, you can send the note to the eMail addresses that you move to the *Selected* list with the help of the arrow buttons.

### Documents Tab

[Projects](#) | [Administration](#) | [Search](#)

---

Project | Gantt | Resources | Tasks | Memos | **Documents** | Expenditure | Reports | Settings

**Project:** Project of the General Management

[Add a new document ...](#)

**Name** **Document**

[0-9](#) | [A-D](#) | [E-H](#) | [I-L](#) | [M-P](#) | [Q-T](#) | [U-X](#) | [Y-Z](#)

Name ▲	Document	Status	In Use	In Use By
No data set exists				

On this page, documents can be saved. To do this, click the link to *Add a new document*. This will show the edit fields *Name* and *Document*. A document inserted in this way will be shown in the table below.

### Expenditure Tab

[Projects](#) | [Administration](#) | [Search](#)

---

Project | Gantt | Resources | Tasks | Memos | Documents | **Expenditure** | Reports | Settings

**Project:** Project of the General Management

**Entered Time Records**  [Enter time record...](#)

Date ▼	Task	Resource	Remarks	Units	Amount
No data set exists					

**Recorded Expenses**  [Enter Expense...](#)

Date ▼	Task	Receipt Number	Expense Type	Remarks	Amount
No data set exists					

On this page, each recorded time expenditure and all entered receipts will be shown.

## Reports Tab

Projects Administration Search

Project Gantt Resources Tasks Memos Documents Expenditure **Reports** Settings

**Project: Project of the General Management**

**Overviews**

Milestones

**Costs**

Resources Costs

Resource Costs with Expenses

**Resource**

Who-does-what

This page will show information about the entire project status and existing costs.

## Settings Tab

Projects Administration Search

Project Gantt Resources Tasks Memos Documents Expenditure Reports **Settings**

**Project: Project of the General Management**

**Warnings**

Warning When Overdue

Warning  Days Before Project Deadline

On this page, the general settings for the project will be set.

## 8. Portlets

### 8.1. Portlet MNG

If a member of the management is logged onto the portal, the new project will now be shown on the start page.

Projects Administration Search

Projects All Projects Gantt Diagram Archive

**Projects** Filter... | I want to...

Project	Project Manager	Start	End	Date	Costs	Tasks	Status
<b>Project of the General Management</b>	Roman Herder	2006-10-16	2006-11-16		EUR	2/2/0	New

**Milestones** ↕

In the *Projects* table, the most important project details for projects of the management will be shown. The link to *Filter* will show the projects of a specific customer or project manager.

In the *Milestones* table, all tasks will be shown that are designated as milestones. The tab *All Projects* allow the details of individual projects to be reached. The *Gantt Diagram* tab will graphically display the project progress. All archived projects are available via the *Archive* tab.

### 8.2. Portlet PM

If a project manager is logged onto the portal, the start page will present itself as shown below.

Project	Project Manager	Start	End	Date	Tasks	Status
<b>Project of the General Management</b>	Roman Herder	2006-10-16	2006-11-16		2/2/0	New

Project	Task	Start	End	Priority	Milestone	Status
Project of the General Management	Task Roman Herder	2006-10-19	2006-10-19	B	◆	New
Project of the General Management	Task Sabine Betz	2006-10-16	2006-11-15	B		New

Project managers can only view the projects for which they have been entered as project manager or assistant. All project tasks will be listed in the *Tasks* area. Clicking the 📄 icon allows a receipt to be recorded, and the 🕒 symbol allows a time expenditure to be entered.

### 8.3. Portlet ST

If a member of project staff is logged onto the portal, the start page will present itself as shown below:

Project	Project Manager	Start	End	Tasks	Status
<b>Project of the General Management</b>	Roman Herder	2006-10-16	2006-11-16	2/2/0	New

Project	Task	Start	End	Priority	Milestone	Status
Project of the General Management	Task Sabine Betz	2006-10-16	2006-11-15	B		New

The project details cannot be changed. The lower area will show the tasks for the employee. Entering new projects is not possible for staff. Additionally, overviews are restricted and return only data that the employee has entered himself. The project name will not be shown. In the default setting for Project Management, the project link will be set here as a button. Clicking this button will open the *Projects* page. As project staff have no permissions to this page, the button will be hidden.

You can show the project name by replacing the button in the Application Designer on the page *stProjectsCenter ST* in the *Projects* data group with a view field that is connected to the *Title* data field. The button to the page *stProjectsCenter* in the data group *Tasks* must also be replaced with a view field if you wish for the project name to be shown in the

table below. In this case, the project title will also no longer be shown in link format for the *Project Manager* user group.

**9. Tasks**

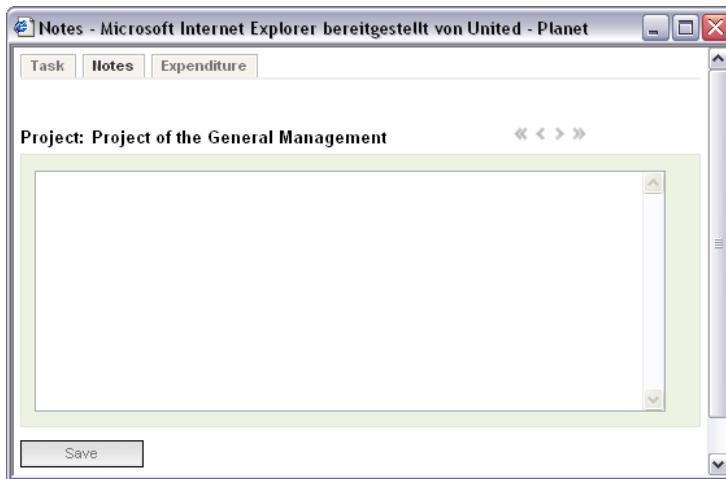
Project tasks can be entered in the project details via the link *I want to...*

<b>Change</b>
Change the project details...
Change the project description...
Archive project...
<b>Compose</b>
Enter a task...
Enter a memo...
Enter a time record...
Enter an expense...
<b>Overviews</b>
See an overview of reports...

Select the menu item *Enter a task here*.

**9.1. Entering a Task**

The *Milestone* setting identifies a task as a milestone. Enter the name of the task in the *Task* edit field. Select the *Resource* from the selection list. The task can be assigned to a *Tasks group*. Select the priority of the task from the selection list. In the *Gantt Position* field, the position of the task in the Gantt diagram can be defined. The lower the value of the integer entered, the higher the position of the task in the Gantt diagram will take. Enter the planned *Start* and *End date* of the task in the *Plan Status* area. The *Actual Status* of a task will automatically be entered as soon as the task is activated.



On the *Description* tab, a description for the task can be recorded.



On the *Expense* tab, every recorded time expenditure and recorded receipts will be shown in the corresponding tables.

## 9.2. Changing the Status of a Task

Project managers have the access permissions necessary to change the status of tasks.

Projects Administration Search

Project Gantt Resources Tasks Memos Documents Expenditure Reports Settings

**Project: Project of the General Management**

**Project Details** [I want to...](#)

		Plan	Actual
<b>Status</b>	New		
<b>Number</b>	1	<b>Start</b> 2006-10-16	
<b>Customer</b>	in-house	<b>End</b> 2006-11-16	
<b>Manager</b>	Roman Herder	<b>Costs</b> 10.000,00 EUR	0,00 EUR
<b>Tasks</b>	2/20		

**Current Tasks**

Task	Resource	Planned end	Priority	Milestone	Status
<b>Task Roman Herder</b>	Roman Herder	2006-10-19	B	◆	New
<b>Task Sabine Betz</b>	Sabine Betz	2006-11-15	B		New

**Project Description**

Newly entered tasks will be shown in the lower area of the project details. Clicking on the link to the task will open the task in a pop-up window.

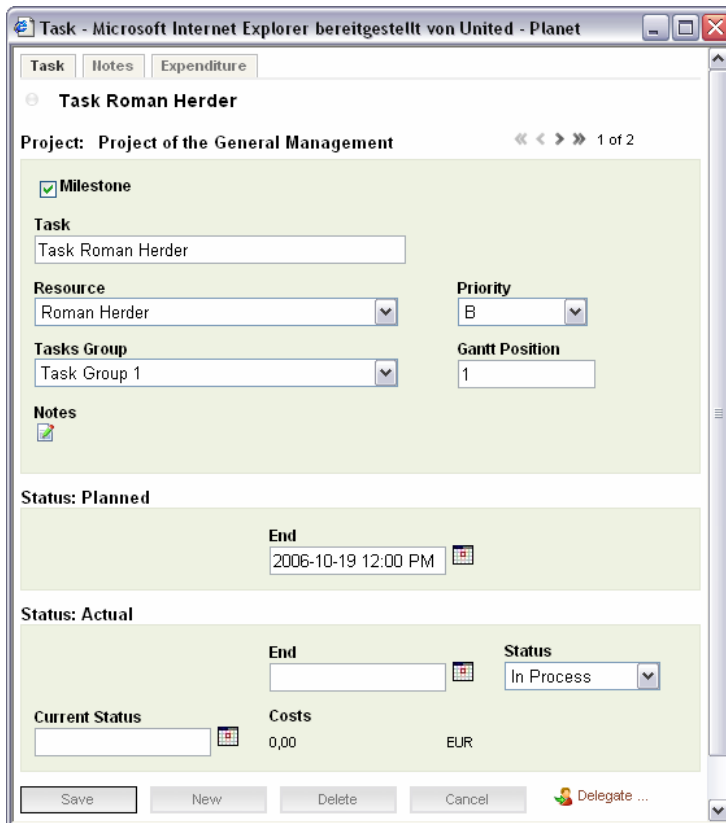
The status of the task can be set to *In Progress* here.

Current Tasks					
Task	Resource	Planned end	Priority	Milestone	Status
<b>Task Roman Herder</b>	Roman Herder	2006-10-19	B	◆	In Progress
<b>Task Sabine Betz</b>	Sabine Betz	2006-11-15	B		New

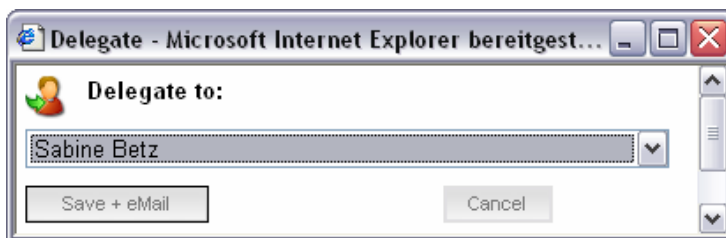
The changed status will be shown in the project details. If the status of a task is set to *Completed*, the task will no longer be shown on the *Project* page. Completed tasks are available from the *Tasks* tab.

Task	Planned Start	Planned End	End	Resource	Priority	Milestone	Status
<b>Task Roman Herder</b>	2006-10-19	2006-10-19	2006-10-16	Roman Herder	B	◆	Completed
<b>Task Sabine Betz</b>	2006-10-16	2006-11-15		Sabine Betz	B		New

9.3. Delegating Tasks



A task can be transferred to a different employee by clicking the link to *Delegate task*.




By clicking *OK + eMail*, a notification will be sent via eMail to the employee to whom the task has been delegated. A prerequisite for this is that you have entered the eMail address in resources administration and that the *SMTP Service* tool has been set up (see handbook *Tools*).

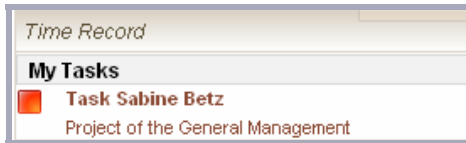
10. Time Recording


10.1. Time Recording Portlet

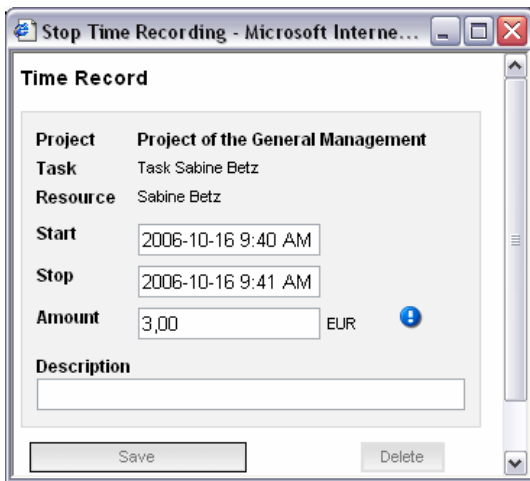
In the time recording portlet on the main portal page, the time expenditure for a task can be quickly and easily entered.




Click on the  icon here, if you wish to begin a time recording.




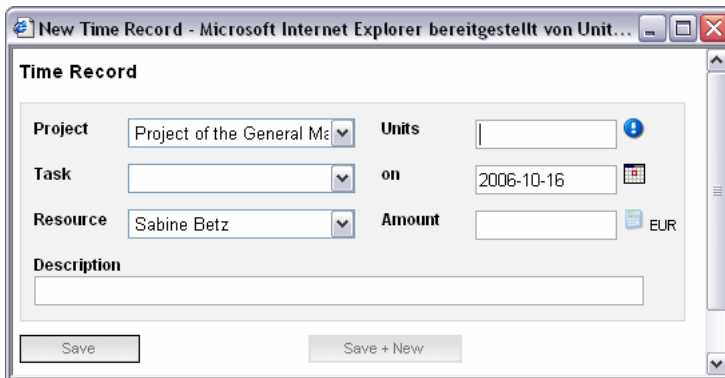
The  icon shows that the time recording for a task is currently active. If you wish to stop the recording, please click the icon again.




The start and end of the recording will be shown in a pop-up window. Additionally, based on the data that you have entered in the resources administration, it will calculate the costs of the recorded time. In the *Booking Text* field, a description of the time recording can be entered. Save the recorded time expenditure by clicking .



### 10.2. Manually Recording a Time Expenditure

By clicking the  icon, which you will find in the project details and on the *Expense* tab, a time expenditure can be manually recorded. You can also enter a time expenditure via the link *I want to...* on the start page of Project Management.




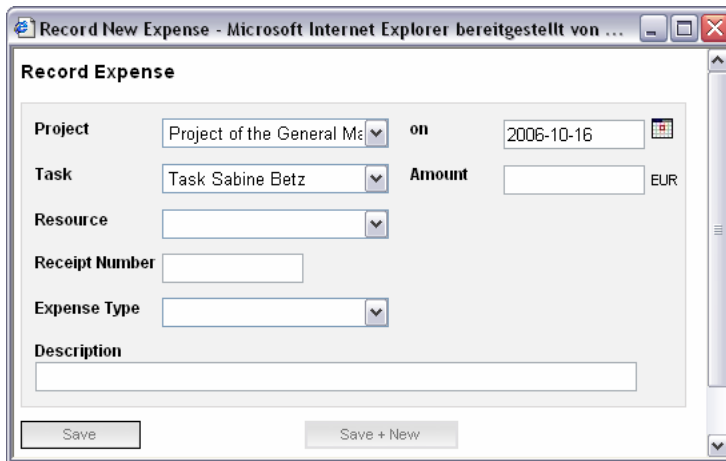
In the *Task* selection list, the task can be selected for which the time expenditure will be recorded. Enter the number of consumed units in the *Units* edit field. With the  icon, additional information on the unit will be shown.



The calculator icon  allows the costs, using the data from the *Units* edit field, to be automatically calculated and entered. Next, enter the *Booking Text* for the time recording. Complete the record by clicking .

### 11. Entering a Receipt


By clicking the  icon, which you will find in the project details and on the *Expense* tab in the task data, a receipt can be entered. Receipts can also be entered on the start page of Project Management by clicking the link *I want to...*



The screenshot shows a web browser window titled "Record New Expense - Microsoft Internet Explorer bereitgestellt von ...". The main content area is a form titled "Record Expense". The form has the following fields:

- Project:** A dropdown menu with "Project of the General Me" selected.
- on:** A date field with "2006-10-16" and a calendar icon.
- Task:** A dropdown menu with "Task Sabine Betz" selected.
- Amount:** A text input field.
- Resource:** A dropdown menu.
- Receipt Number:** A text input field.
- Expense Type:** A dropdown menu.
- Description:** A text area.

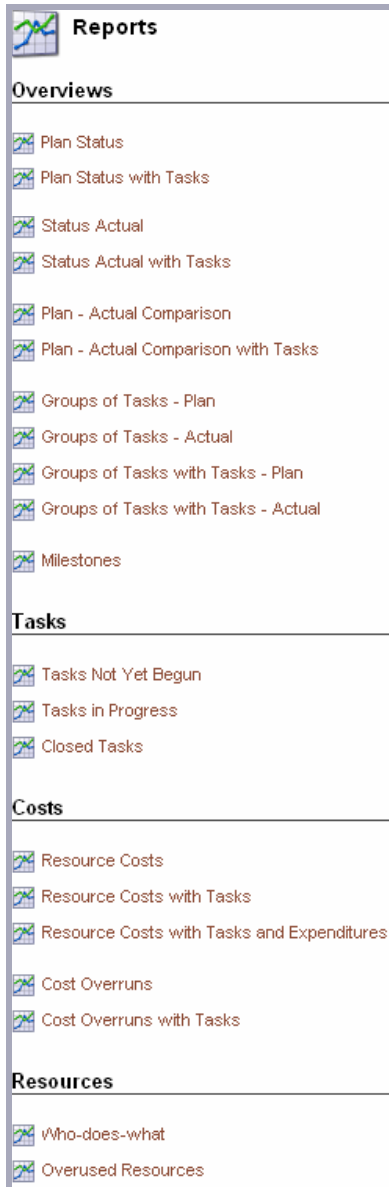
At the bottom of the form, there are two buttons: "Save" and "Save + New".

After saving, this recorded receipt will be shown in the table below. Enter the *Resource*, *Receipt Number*, *Type of Receipt*, *Amount*, and the *Description* here. Save the receipt by clicking  *OK*.

## 12. Reports

### 12.1. Comprehensive Project Reports

On the start page of Project Management, members of the management and project managers can reach comprehensive analyses of projects from the menu item *I want to... / see an overview of reports*.



### 12.1.1. Plan Status

Report of plan status (P0) - Microsoft Internet Explorer bereitgestellt von United - Planet

Plan status for all projects 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost
Project of the General Management	Roman Herder	P	2006-10-16	2006-11-16	10.000,00 EUR

Print

This report shows the planned status of all projects.

### 12.1.2. Plan Status with Tasks

Report of plan status (P2) - Microsoft Internet Explorer bereitgestellt von United - Planet

Plan status of all projects and tasks 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost
Project of the General Management	Roman Herder	P	2006-10-16	2006-11-16	10.000,00 EUR
<i>Task</i>					
	<i>Resource</i>	<i>Status</i>	<i>Start</i>	<i>End</i>	
Task Sabine Betz	Sabine Betz	P	2006-10-16	2006-11-15	
Task Roman Herder	Roman Herder	P	2006-10-19	2006-10-19	

Print

In addition to the planned status of the project, a listing of all tasks will be given here.

### 12.1.3. Status – Actual

Report of status - actual (P0) - Microsoft Internet Explorer bereitgestellt von United - Planet

Actual status for all projects 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost	Balance Sheet
Project of the General Management	Roman Herder	P	2006-10-16	-	0,00 EUR	10.000,00 EUR

Print

Here the status, start, end, current costs, and the balance of the actual status will be reported.

### 12.1.4. Status – Actual with Tasks

Report of plan status (P2) - Microsoft Internet Explorer bereitgestellt von United - Planet

Plan status of all projects and tasks 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost
Project of the General Management	Roman Herder	P	2006-10-16	2006-11-16	10.000,00 EUR
<i>Task</i>					
	<i>Resource</i>	<i>Status</i>	<i>Start</i>	<i>End</i>	
Task Sabine Betz	Sabine Betz	P	2006-10-16	2006-11-15	
Task Roman Herder	Roman Herder	P	2006-10-19	2006-10-19	

Print

Additional to an overview of the actual status, all tasks will be listed here.

### 12.1.5. Plan – Actual Comparison

Report of comparison between plan and actual (P0) - Microsoft Internet Explorer bereitgestel...

Plan - Actual comparison for all projects 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost	Balance Sheet
Project of the General Management	Roman Herder	P Plan	2006-10-16	2006-10-16	10.000,00 EUR	
		Actual	2006-10-16	2006-10-16	0,00 EUR	10.000,00 EUR

Print

In this report, the planned status of all projects will be compared to the actual status and given as the balance.

12.1.6. Plan – Actual Comparison with Tasks

Plan - actual comparison for all projects and tasks 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost	Balance Sheet
Project of the General Management	Roman Herder	P	Plan	2006-10-16	2006-10-16	10,000,00 EUR
			Actual	2006-10-16	2006-10-16	0,00 EUR
Task	Resource	Status	Start	End	Cost	
Task Sabine Betz	Sabine Betz	P	Plan	2006-10-16	2006-11-15	
			Actual	2006-10-16	-	0,00 EUR
Task Roman Herder	Roman Herder	P	Plan	2006-10-19	2006-10-19	
			Actual	-	-	0,00 EUR

Print

All tasks will be listed here in addition to the plan – actual comparison.

12.1.7. Groups of Tasks - Plan

Report of groups overview - planned (P0) - Microsoft Internet Explorer bereitgestellt von Unit... 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End
Project of the General Management	Roman Herder	P	2006-10-16	2006-11-16
Group			Start	End
Task Group 1			2006-10-19	2006-10-19
Task Group 2			2006-10-16	2006-11-15

Print

In this report, the planned start and end dates of task group tasks will be given.

12.1.8. Groups of Tasks - Actual

Report of groups overview - actual (P0) - Microsoft Internet Explorer bereitgestellt von Unite... 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost
Project of the General Management	Roman Herder	P	2006-10-16	-	
Group			Start	End	Cost
Task Group 1			-	-	0,00 EUR
Task Group 2			2006-10-16	-	0,00 EUR

Print

In this report, the actual start and end dates of task group tasks will be given.

### 12.1.9. Groups of Tasks with Tasks - Plan

Report of groups overview - planned - Microsoft Internet Explorer bereitgestellt von United - ...

Overview of groups of tasks for all projects - planned 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End
Project of the General Management	Roman Herder	P	2006-10-16	2006-11-16
Group			Start	End
Task Group 1			2006-10-19	2006-10-19
Task		Resource	Status	
Task Roman Herder	Roman Herder	P	2006-10-19	2006-10-19
Group			Start	End
Task Group 2			2006-10-16	2006-11-15
Task		Resource	Status	
Task Sabine Betz	Sabine Betz	P	2006-10-16	2006-11-15

Print

In addition to an overview of grouped tasks, all relevant tasks will be listed (Plan status).

### 12.1.10. Groups of Tasks with Tasks - Actual

Report of groups overview - actual (P0) - Microsoft Internet Explorer bereitgestellt von Unite...

Overview of groups of tasks for all projects - actual 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost
Project of the General Management	Roman Herder	P	2006-10-16	-	
Group			Start	End	Cost
Task Group 1			-	-	0,00 EUR
Task Group 2			2006-10-16	-	0,00 EUR

Print

In addition to an overview of grouped tasks, all relevant tasks will be listed (Actual status).

### 12.1.11. Milestones

Milestones Report - Microsoft Internet Explorer bereitgestellt von United - Planet

Milestones for all projects 2006-10-16

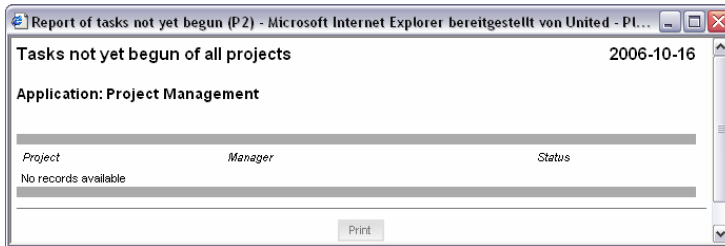
Application: Project Management

Project	Manager	Status	Date	Cost
Project of the General Management	Roman Herder	P		
Task		Resource	Status	
Task Roman Herder	Roman Herder	P	2006-10-19	
			Plan	
			Actual	0,00 EUR

Print

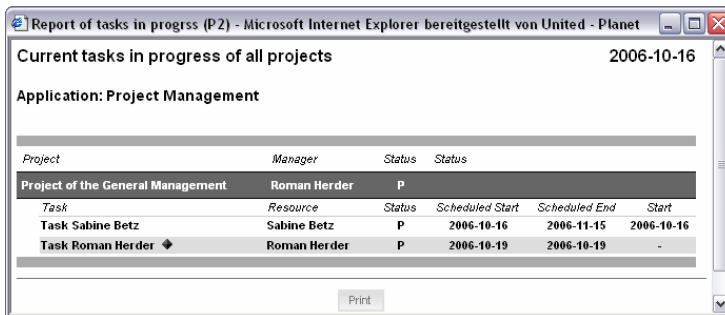
This report lists the milestones for all projects.

### 12.1.12. Tasks Not Yet Begun



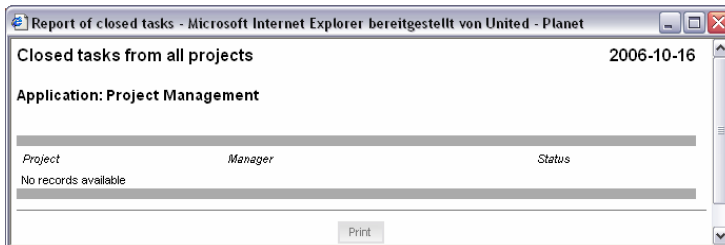
Here you will have an overview of all tasks that have not yet been started.

### 12.1.13. Tasks in Progress



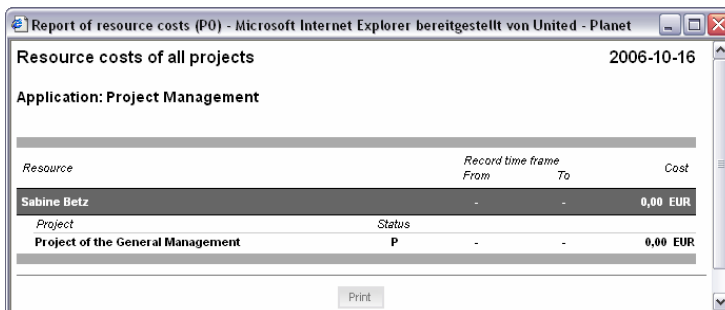
Here you will have an overview of all tasks with the status *In progress*.

### 12.1.14. Closed Tasks



Here you will have an overview of all closed tasks.

### 12.1.15. Resource Costs



This report gives the costs of all recorded time expenditures and expenses.

12.1.16. Resource Costs with Tasks

Report of resource costs (P2) - Microsoft Internet Explorer bereitgestellt von United - Planet

Resource costs of all projects and tasks 2006-10-16

Application: Project Management

Resource					
Sabine Betz					0,00 EUR
Project	Status	Record time frame		Cost	
		From	To		
Project of the General Management					0,00 EUR
Task					
Task Sabine Betz					0,00 EUR

Print

Additionally to the costs, all tasks will be listed here as well.

12.1.17. Resource Costs with Tasks and Expenditures

Report of resource costs (P2) - Microsoft Internet Explorer bereitgestellt von United - Planet

Resource costs of all projects and tasks 2006-10-16

Application: Project Management

Resource					
Sabine Betz					0,00 EUR
Project	Status	Record time frame		Cost	
		From	To		
Project of the General Management					0,00 EUR
Task					
Task Sabine Betz					0,00 EUR
Expense					
					0,00 EUR

Print

With this report, you will see an overview of all costs, tasks, and expenditures of individual projects.

12.1.18. Cost Overruns

Report on cost overruns (P0) - Microsoft Internet Explorer bereitgestellt von United - Planet

Cost overruns of all projects 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost	Balance Sheet
No records available						

Print

This report will inform the user of the balance when costs exceed the planned budget.

12.1.19. Cost Overruns with Tasks

Report of cost overruns (P2) - Microsoft Internet Explorer bereitgestellt von United - Planet

Cost overruns on all projects with tasks 2006-10-16

Application: Project Management

Project	Manager	Status	Start	End	Cost	Balance Sheet
No records available						

Print

In addition to a report of cost overruns, all tasks will be listed here.

### 12.1.20. Who-does-what

Report of who-does-what (P2) - Microsoft Internet Explorer bereitgestellt von United - Planet 2006-10-16

Overview of "who-does-what" of all projects

Application: Project Management

Resource

**Roman Herder**

Project

Project of the General Management

Task	Status	Plan:	Start	End
Task Roman Herder	P	2006-10-19	2006-10-19	2006-10-19
		<b>Actual:</b>	-	-

**Sabine Betz**

Project

Project of the General Management

Task	Status	Plan:	Start	End
Task Sabine Betz	P	2006-10-16	2006-10-16	2006-11-15
		<b>Actual:</b>	2006-10-16	-

Print

This report informs the user of task delegation in regard to individual users.

### 12.1.21. Overused Resources

Report on overused resources - Microsoft Internet Explorer bereitgestellt von United - Planet 2006-10-16

Report on overused resources

Application: Project Management

Resource




No overused resource available


Print

With this report, you can be made aware of overused resources. In it, the distribution of the resource to the individual projects, in connection with the tasks, will be considered. An overuse will occur when a resource has more than one task in the same time frame to process, and has a workload of over 100% between the tasks.

## 12.2. Project-related Reports

Members of the management and project managers will find on the start page, next to each project, symbols for

-  Viewing the documents related to the project
-  View of project-related reports
-  View of the Gantt diagram

Clicking the  symbol will show reports related to the individual projects. This page is also available via the *Reports* tab on the project details page.

### 12.2.1. Milestones

**Report of Milestones - Microsoft Internet Explorer bereitgestellt von United - Planet**

**Milestones** 2006-10-16

**Application:** Project Management  
**Project:** Project of the General Management

**Status:** In Process  
**Project Leader:** Roman Herder **eMail:** Roman.Herder@coffeexpress.com  
**Deputy:** Sabine Betz **eMail:** Sabine.Betz@coffeexpress.com

	Start	End	Costs
<b>Plan</b>	2006-10-16	2006-11-16	10.000,00 EUR
<b>Actual</b>	2006-10-16		0,00 EUR

Task	Resource	Status	Date	Cost
<b>Task Roman Herder</b>	<b>Roman Herder</b>	<b>P</b>	Plan 2006-10-19	
			<b>Actual</b>	<b>0,00 EUR</b>

Print

In this report, in addition to status and plan- and actual status, all milestones of the project will be analyzed.

### 12.2.2. Resource Costs

**Resource Costs Report - Microsoft Internet Explorer bereitgestellt von United - Planet**

**Resource Costs** 2006-10-16

**Application:** Project Management  
**Project:** Project of the General Management

**Status:** In Process  
**Project Leader:** Roman Herder **eMail:** Roman.Herder@coffeexpress.com  
**Deputy:** Sabine Betz **eMail:** Sabine.Betz@coffeexpress.com

	Start	End	Costs
<b>Plan</b>	2006-10-16	2006-11-16	10.000,00 EUR
<b>Actual</b>	2006-10-16		0,00 EUR

Resource	Cost
<b>Sabine Betz</b>	<b>0,00 EUR</b>

Task	Status	Record time frame	Cost
		From To	
<b>Task Sabine Betz</b>	<b>P</b>	- -	<b>0,00 EUR</b>

Print

This report will inform you of the existing project costs. It will refer to recorded time expenditures and all receipts per task.

### 12.2.3. Resource Costs with Expenses

**Resource Costs Report - Microsoft Internet Explorer bereitgestellt von United - Planet**

**Resource Costs** 2006-10-16

**Application:** Project Management  
**Project:** Project of the General Management

**Status:** In Process  
**Project Leader:** Roman Herder **eMail:** Roman.Herder@coffeexpress.com  
**Deputy:** Sabine Betz **eMail:** Sabine.Betz@coffeexpress.com

	Start	End	Costs
<b>Plan</b>	2006-10-16	2006-11-16	10.000,00 EUR
<b>Actual</b>	2006-10-16		0,00 EUR

Resource	Cost
<b>Sabine Betz</b>	<b>0,00 EUR</b>

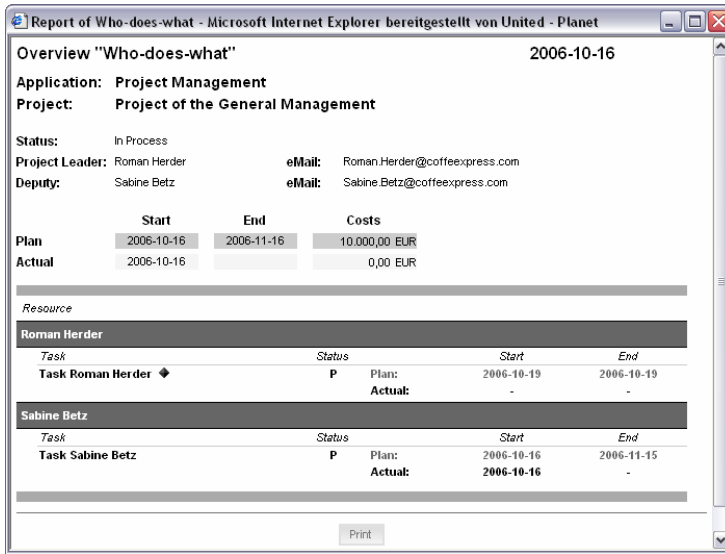
Task	Status	Record time frame	Cost
		From To	
<b>Task Sabine Betz</b>	<b>P</b>	- -	<b>0,00 EUR</b>

Expense	Cost
	<b>0,00 EUR</b>

Print

Additionally, information about the details of the expenditures will be given here.

**13. Who-does-what**



This report will inform you of the task distribution to the individual resources of the project.