Rillsoft Project

Release 9

Rillsoft GmbH

Sep 11, 2024

CONTENTS

1	Lega	l notice		1
2	Intro	al notice voluction rking in networks rk with Project New Project Al.1 Create new project 4.1.1 Create new project 4.1.2 Open project 4.1.3 New project from template 4.1.4 Reload project Set project properties 4.2.1 Define project properties 4.2.2 Preferred teams 4.2.3 Define machine types that can be shared 4.2.4 Define machinery that can be shared 4.2.5 Define header and footer 4.2.6 Define color 4.2.7 Define color 4.2.8 Create user-defined fields 4.2.9 Enter notes & links 4.2.10 Documents(DMS) Settings for project and programme 4.3.1 Save settings for nojeet 4.4.1 Save settings for project 4.4.2	3	
3	Work	king in n	etworks	5
4	Work	s with Pi	roject	7
	4.1	New Pr	oject	7
		4.1.1	Create new project	7
		4.1.2	Open project	8
		4.1.3	New project from template	8
		4.1.4	Reload project	9
	4.2	Set proj	ect properties	11
		4.2.1	Define project properties	11
		4.2.2	Preferred teams	13
		4.2.3	Define machine types that can be shared	13
		4.2.4	Define machinery that can be shared	15
		4.2.5	Define header and footer	17
		4.2.6	Define format	18
		4.2.7	Define color	18
		4.2.8	Create user-defined fields	19
		4.2.9	Enter notes & links	20
		4.2.10	Documents(DMS)	21
	4.3	Settings	for project and programme	23
		4.3.1	Save settings in the workplace	23
		4.3.2	Copy settings from the workplace	24
	4.4	Settings	s for project with Rillsoft Integration Server	24
		4.4.1	Save settings for project	24
		4.4.2	Save settings for header and footer	26
		443	Save settings for user view	27
		444	Project documents	28
	45	Project	information	29
	1.0	4 5 1	Project information	29
		452	Late activities	$\frac{2}{29}$
		453	Overallocated resources	30
		4.5.4	Failed resource	31
		455	Unassigned resources	33
		т. <i>3.3</i> 456	Dartially assigned resources	31
		4.5.0	I al ually assigned resources	25
		4.3.1	Pluject uver view	20
		4.J.ð		30

	4.5.9	Cross-project links
	4.5.10	External documents
4.6	Create a	activities
	4.6.1	Create activities
	4.6.2	Edit activities
	4.6.3	Delete activities
4.7	Workin	g with activity and subproject tables
4.8	Link ac	tivities
	4.8.1	Link activities
	4.8.2	Edit link
	4.8.3	Delete link
4.9	Activiti	es properties
	4.9.1	Enter activity properties
	4.9.2	Define general activity properties
	4.9.3	Assign roles
	4.9.4	Assign employees
	4.9.5	Timesheet
	4.9.6	Allocate material 55 Allocate material 57
	4.9.7	Allocate machine types
	4.9.8	Allocate machinery
	4.9.9	Check links
	4.9.10	Denne format
	4.9.11	Fill in user-defined fields $\dots \dots \dots$
	4.9.12	Enter notes & links
4 10	4.9.15	Assign documents in the DMS
4.10	Split ac	tivities into places / subproject
4.11	Subproi	Traces 7 subproject
4.12	A 12 1	Create subproject 72
	4.12.1	Insert subprojects from file 73
	4.12.2	Insert subprojects from Rillsoft Integration Server template 75
	4 12.5	Fdit subprojects
	4 12 5	Delete subprojects 78
	4 12 6	Enter subprojects 70
	4 12 7	Assign activities to subprojects 79
4.13	Summa	rv project
	4.13.1	Summary project
	4.13.2	New Summary project in Rillsoft with interface to Rillsoft Integration Server
	4.13.3	Open a summary project in Rillsoft with interface to Rillsoft Integration Server
	4.13.4	Reload summary project
	4.13.5	Form a summary project from a split project
	4.13.6	Summary project archiving in Rillsoft with interface to the Rillsoft Integration Server 88
	4.13.7	Cross-project links in summary project
4.14	Take ov	er start and finish dates of a project from activities
4.15	Improve	e presentation of the project 91
4.16	Optimiz	ze a project
4.17	Save pr	oject
4.18	Save pr	oject as template
4.19	Import	of projects
	4.19.1	Import
	4.19.2	Import from MS Project XML
	4.19.3	Import text file CSV format
4.20	Export	of projects
	4.20.1	Export

		4.20.2	MS Project XML
		4.20.3	Export to MS Excel
		4.20.4	Export to MS Outlook
		4.20.5	Export XML for Web
5	Reso	urce mai	nagement 115
	5.1	Create r	esources
		5.1.1	Identify resources
		5.1.2	Create new resource pool file
		5.1.3	Create new resource pool in Rillsoft with interface to Rillsoft Integration Server
		5.1.4	Import of the resource pool from resource pool file in Rillsoft Integration Server
		5.1.5	Select other resource pool
		5.1.6	Set and adjust calendars
		517	Set and adjust roles 125
		518	Set and adjust teams
		519	Set and adjust employees 120
		5 1 10	Set and adjust materials
		5 1 11	Set and adjust machine types
		J.1.11 5 1 12	Set and adjust machine types
		5.1.12	
		5.1.13	Set and adjust project categories
		5.1.14	Set and adjust project status
		5.1.15	Set and adjust project customers
	5.2	Update	resource pool
	5.3	Assign	resources
		5.3.1	Resource allocation
		5.3.2	Assign activities to a role in the view Role
		5.3.3	Role View Resource Properties
		5.3.4	Assign activities to a team in the view Team
		5.3.5	Team View Resource Properties
		5.3.6	Assign activities to an employee in the Human resource capacity planning
		5.3.7	Assign activities to an employee in the view Employee
		5.3.8	Employee View Resource Properties
		5.3.9	Assign activities to a material in the view Material requirements
		5 3 10	Material requirement Properties 166
		5 3 11	Assign activities to a machine type in Machine types 167
		5 3 12	Machine types Pasource properties 170
		5 2 12	Assign activities to mechines in the view Machine vege
		5.2.14	Assign activities to machines in the view Machine usage
		5.5.14	
	~ .	5.3.15	
	5.4	Automa	
		5.4.1	Assign employees to activities
		5.4.2	Remove employees from activities 181
		5.4.3	Assign machinery to activities
		5.4.4	Remove machinery from activities
		5.4.5	Identify roles from the employyes assignation
		5.4.6	Identify machine types from machine allocation
	5.5	Synchro	nize resources
		5.5.1	Shift to resource pool
		5.5.2	Manual selection of calendar
		5.5.3	Manual selection of roles
		5.5.4	Manual selection of teams
		5.5.5	Manual selection of employees
		5.5.6	Manual selection of materials
		557	Manual selection of machine types 107
		5.5.1	

		5.5.8	Manual selection of machinery	199
		5.5.10	Manual selection of project category	200
		5.5.10	Manual selection of project status	201
		5.5.11		202
6	Proie	ect views		205
Č	6.1	Project	views	205
	6.2	Gantt cl	part	207
	6.3	Varianc	e analysis	210
	6.4	Varianc	e analysis time	211
	6.5	Varianc	e analysis effort.	212
	6.6	Varianc	e analysis cost	213
	6.7	Varianc	e analysis activity properties	214
	6.8	Varianc	e analysis of subproject properties	217
	6.9	Networl	k diagram	220
	6.10	Gantt-n	etwork chart	223
	6.11	Role		225
	6.12	Role us	age with effort	228
	6.13	Role us	age and FTE	228
	6.14	Project-	specific role	231
	6.15	Team		231
	6.16	Project-	specific team	234
	6.17	Employ	ee workload	234
	6.18	Employ	ee workload with an additional Gantt chart	233
	6 1 9	Project-	specific employee workload	238
	6.20	Timesh	specific employee workload	230
	6.21	Human	Resource Capacity Leveling	237
	6.22	Relative	capacity requirements percent each role	241 242
	6.22	Human	Resource Capacity Leveling with an additional Gantt chart	242
	6.23	Project-	specific Human Resource Capacity Leveling	243
	6.25	Human	Resource Capacity Leveling with additional resource chart	244
	6.26	Materia	l requirement	240
	6.27	Machin		247
	6.28	Machin	erv usage	240
	6.20	Machin	e canacity planning	277
	6.30	Machin	e capacity planning	251
	6.31	Custom		252
	6.32	User vi		255
	6.32	Additio	nal resource chart	255
	6.34	Additio		200
	6.35	Additio	nal cost chart	261
	6.36	Filter		203
	6.37	Search		264
	0.57	Scaren		200
7	Proie	ect portfo	olio	269
	7.1	Project	portfolio	269
	7.2	New pro	piect portfolio	270
	7.3	New Pro	oject Portfolio in Rillsoft with Interface to the Rillsoft Integration Server	272
	7.4	Open a	project portfolio	274
	7.5	Open a	project portfolio in Rillsoft with interface to Rillsoft Integration Server	276
	7.6	Reload	portfolio	279
	7.7	Cross-p	roject links	281
		I	•	
8	Proje	ect contro	olling	285

iv

	8.1 Project controlling	285
	8.2 Add baseline	289
	8.3 Select baseline	289
	8.4 Dynamic baseline	290
	8.5 Delete baselines	291
	8.6 Variance analysis	291
	8.7 Control of project financing	293
9	Project management	295
10	Print	297
	10.1 Printing	297
	10.2 Print preview	298
	10.3 Print view	299
	10.4 Print holiday report	300
11	Customize program environment	303
	11.1 Adjustments of the program environment	303
	11.2 General	304
	11.3 Display	306
	11.4 Extended	309
	11.5 Customize Ribbon	310
	11.6 Quick Access Toolbar	311
12	Indices	313

CHAPTER

ONE

LEGAL NOTICE

Rillsoft GmbH Mollenbachstrasse 14 71229 Leonberg

Email: info@rillsoft.com

Copyright © 2024 Rillsoft GmbH

All rights reserved. No part of this manual may be reproduced in any form or stored, processed, multiplied or distributed using electronic systems without a written permission of the authors.

Disclaimer

The content of this manual is not an exact description in the legal sense and is not a subject to product liability. The authors reserve the right to make changes to the software without notification. We cannot assume any liability for the content correctness and completeness of this manual. In order to be able to offer you the best possible product and service, we are always open to criticism, information and suggestions regarding this product.

Trademark notice

Rillsoft is a registered trademark of Rillsoft GmbH. All product names mentioned in this manual may be trademarks or registered trademarks of their owners.

CHAPTER

INTRODUCTION

Rillsoft Project is a high-performance software tool for project management, assisting you in project scheduling, capacity planning and management resource planning.

Rillsoft Project provides the following functions for all project stages

Project scheduling and management resource planning

- scheduling personnel resources in the form of:
 - * roles,
 - * teams,
 - * employees.
- flexibly recording of roles by different levels of qualification with graded cost rates.
- defining teams by:
 - * capacity and costs per hour,
 - * assigned employees.
- recording employees by
 - * assignation to several teams,
 - * simultaneous assignation to several roles with different qualifications, costs and stages of productivity,
 - * independent determination of non-working days (holidays, sickness).
- evaluation of available capacity and usage of roles and employees at any time.
- assigning employees on the basis of their roles and qualifications by means of an assistant program.
- entering the work result of activities (pit 180 m3).
- displaying the activity effort by entering employee days (such as 5 ED).
- describing and administering the required materials and machines.
- applying several calendar for the individual resources and a flexible scheduling.
- multiproject planning and project portfolio.
- evaluating excess and shortfall of personnel resources (supply minus demand = contingency).
- using subprojects and WBS codes to structure the project.
- viewing the project details from different perspectives.
- Project controlling and project execution analysis
 - updating the project by recording the completion percentage of the activities.

- providing a variance analysis which matches the parameters, such as time, costs and resource utilization, of the target to those of actual.
- quickly detecting deviances from actual by means of a progress line and a baseline.
- controlling the project financing.

• Project management

conciliating the actual with the target

- assigning or reassigning employees to and from activities in the ongoing project.
- assigning personnel to critical activities, in order to speed up execution.

conciliating the target with the actual

- separating of completed activities from waiting activities.
- shifting of delayed activities to the cutoff date.
- optimising of resource utilization of not yet completed project activities.

• Reports

- Gantt chart, resource and capacity views can be exported to MS Excel.
- All views can be printed out as PDF files.

CHAPTER

THREE

WORKING IN NETWORKS

In order to avoid conflicts between resources, all users of the network should share the same resource pool file. After the start Rillsoft Project accesses the resource pool.

You can check below in the left corner of the status bar, where to find your resource pool.



There is a difference between file-based solution and data-based solution (Rillsoft Project with interface to Rillsoft Integration Server).

File-based solution

Resource pool is a xml-file, it is located in the application folder.

For a networking or **floating license** would be right if this file indicates a network path such as \\Server_Name\Rillsoft Project or a mapped folder e.g. R:\Rillsoft Project. A local path such as C:\Rillsoft Project would be wrong for a floating license.

Change local folder to network folder (it is relevant only for floating license)

If your resource pool file indicates an incorrect (local) path, proceed as follows:

- · Using Windows Explorer copy local Rillsoft folder, where is your resource pool file, to the Clipboard
- Then paste it into a network folder on the server
- Click File > Resource pool > File > Select
- In the dialog open select the inserted Rillsoft folder with resource pool file on the server
- Set a resource pool file from the Rillsoft folder on the server
- In the left corner of the status bar, check if your resource pool file uses the correct path.

Rillsoft Project offers a separate file repository, that is, program files are saved in the program folder and user files - in the user folder. During installation all users will be granted full access to the user folder (data folder).

Users do not require a write access for the program folder.

Data-based solution (Rillsoft Project with interface to Rillsoft Integration Server)

Resource pool is saved in a central database.

RESOURCE POOL FILE: C:\ProgramData\Rillsoft Project 6.1\RillPrj.xml

CHAPTER

FOUR

WORK WITH PROJECT

4.1 New Project

4.1.1 Create new project

In order to create a new project, do as follows:

1. Select the menu item **File > New > New Project**.



2. Select the menu item Start > Property > Project. The new project and the window Project properties appears.

Properties	s				
Name:	2016_2_soft			Code:	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color	User fields Notes	
Due date	Date Time	Project calendar: 1 Standard 40-hour work we	Project settings Time step: 1 hour	Planning type © Capacity oriented	OK Cancel
Finish:	05.06.16 + 00:00	- Not selected - Status: - Not selected -	Duration: in workdays(dependent on project c	Color: Automatic color •	
Cutoff date	18.04.16 * 00:00	Baseline: BP 2 ×	Enter deliverable for activity(Example: 150 M ²) Enter effort for activity(Example: 5 man-hours)	Use for subordinated subprojects and activities	

- 3. Enter the project name in the field Name.
- 4. Enter the Start date and Finish date of the project in the tab General in the field Due date.
- 5. In the drop down list Project calendar, select the calendar you want to use for the project.
- 6. Click on the button **OK**.

4.1.2 Open project

In order to open a project (also projects in XML format), do as follows:

- Select the menu item File > Open > File > Project. The dialogue Open appears.
- Select the preferred project file.
- Click on the button **Open**.

Note:

Projects of other formats, such as in XML format you can open by clicking File > Import.

Data-based solution (Rillsoft Project & Interface to Rillsoft Integration Server)

1. Select the menu item File > Open > Rillsoft Integration Server > Project. The dialogue Open appears.

RIS Project open												— X
Client: EN_2016 ~ New Folder Delete Folder Client: E000000000000000000000000000000000000	Locking Pessimistic Optimistic										Delete	Project
Template 	Name 👻	Rea	Locked	Last mo	Code	Category	Priority	Status	Start	Finish	Path	Commit
	2016_2_soft		08.09	24.11.16			100		28.03.16 00:00	05.06.16 00:00	Root Fol	
	new_software dev			24.11.16			100		27.01.16 00:00	29.03.16 14:00	Root Fol	
test	process ABC			07.09.17			100		07.11.16 08:00	11.01.17 14:00	Root Fol	
	Project 1			25.11.16			100		26.01.16 00:00	16.02.16 00:00	Root Fol	
	Project2			25.11.16			100		09.03.16 14:00	29.03.16 14:00	Root Fol	
	software developm			24.11.16			100		23.11.15 08:00	25.01.16 12:00	Root Fol	
History			ОК	C	ancel							

- 2. Select the preferred project.
- 3. Click on the button **OK**.

4.1.3 New project from template

In order to work with templates, at first, you have to save a project by selecting the menu item File > Save as template.

In order to create a new project from a template, do as follows:

- Select the menu item File > New > New project from template or New project from Rillsoft Integration Server template.
- Select the preferred project file in the appearing window.
- Click on the button **Open** or **Ok**.
- The dialogue Select activities from templates opens.

Select of Activity	from Template				
Start: 07.09.1	7 - 00:00				
Finish: 08, 11, 1	7 - 14:00				
For all activities ch	ange: Duration - Sca	le factor:	1		
				[
r.	Name	Start	Finish	Notes	
1	software development process	25.11.10 00:00	26.01.11 14:00		
☑ 1	project planning and oversight	25.11.10 08:00	14.12.10 11:00		
☑ 1.1	software development planning	25.11.10 08:00	29.11.10 10:00		
☑ 1.2	system test planning	25.11.10 08:00	01.12.10 15:00		
⊻ 1.3	software installation planning	01.12.10 15:00	02.12.10 16:00		
☑ 1.4	software installation planning	06.12.10 08:00	10.12.10 12:00		
✓ 1.5	software transition planning	06.12.10 08:00	08.12.10 17:00		
☑ 1.7	following and updating plans	10.12.10 13:00	14.12.10 11:00		
∠ 2	establishing a software development enviro	14.12.10 11:00	27.12.10 11:00		
2.1	software engineering environment	14.12.10 11:00	21.12.10 11:00		
✓ 2.2	software test environment	14.12.10 11:00	15.12.10 14:00		
✓ 2.3	software development library	14.12.10 11:00	16.12.10 17:00		
✓ 2.4	software development files	17.12.10 08:00	23.12.10 12:00		
✓ 2.5	non-deliverable software	23.12.10 13:00	27.12.10 11:00		
3	system requirements analysis	27.12.10 11:00	04.01.11 09:00		
3.1	analysis of user input	27.12.10 11:00	29.12.10 15:00		
32	operational concept	29.12.10.15:00	04.01.11.09:00		
3.3	system requirements	29.12.10 15:00	31.12.10 14:00		
4	system design	29 12 10 15:00	05 01 11 17:00		
25	software requirements analysis	29 12 10 15:00	04 01 11 12:00		
26	software implementation and unit testing	07.01.11.08:00	13 01 11 17:00		
261	software implementation	07.01.11.08:00	13.01.11.17:00		
262	unit testing	07.01.11.08:00	12 01 11 16:00		
263	test case/procedure implementation	07.01.11.08:00	12.01.11.17:00		
20.3	unit integration and testing	07.01.11.08.00	12.01.11.10.00		
	auxilification testing	12 01 11 10:00	14 01 11 16:00		
	quanication testing	14.01.11.10.00	20.01.11.11.00		÷,
IV: J	system (00400C4000) (ES000		20101111100		
		ОК	Cancel		

- You can use the field **Start** to define the time the new project should start.
- You can use the field **Finish** to define the time the new project should finish.
- In the marked field **Change in all activities**, you can change either the **Duration** or **Effort** or **Output** of the marked activities by the **Proportionality factor**.
- It lists all activities and subprojects from the template.
- Mark the activities and subprojects that you want to include in the project.
- Click on the button **OK**.

4.1.4 Reload project

If you are working in a multi-user environment, it may often be necessary to reload a project where several people are working on different projects at the same time in order to view their changes.

With the help of the menu item File > Reload Project > Portfolio you can reload the current portfolio.



Alternatively, you can use a quick access.

Click the Reload icon on the Quick Access Toolbar.



Notes: If the Reload icon is not present, you can select Reload from the Customise Quick Access Toolbar menu item.



4.2 Set project properties

4.2.1 Define project properties

In order to define the project properties, do as follows:

Select the menu item **Start >Properties >Project**.



The window Object properties for the project opens below:

roperties					
Name:	2016_2_soft			Code:	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color	User fields Notes	
- Due date Start: Finish:	Date Time 28.03.16 * 00:00 05.06.16 * 00:00	Project calendar: 1 Standard 40-hour work we v Category: Priority: - Not selected - v 100 Status:	Project settings Time step: 1 hour Duration: in workdays(dependent on project c Effort: in hours	Planning type (e) Capacity oriented (c) Due date oriented Color: Automatic color •	OK Cancel
Cutoff date:	18.04.16 - 00:00	Baseline: BP 2	Enter deliverable for activity(Example: 150 M ^a) Enter effort for activity(Example: 5 man-hours)	Use for subordinated subprojects and activities	

Enter the project name in the field **Name**.

Enter the project code in the field **Code**.

Enter the fields **Start date** and **Finish date** of the project in the tab **General** in the area **Due date**.

In the field Cut off date, enter the date on which the project progress was last updated.

Note: The cut off date is meant to be entered for the controlling and management of ongoing projects. The cut off date should be identical with the start date of the project to ensure correct scheduling.

In the drop down list **Project calendar** select the calendar you want to use for the project.

The button _____ allows the quick access to the actual calendar.

In the drop down list Category select the category you want to use for the project.

Note: You can create a drop down menu for the category in the menu item **Start > Properties > Resource > Project categories**.

In the field **Priority** enter a value between 1 and 1000. The higher the priority of a project is, the more resources can be assigned to it during capacity alignment in relation to other projects in the project portfolio.

Note: Priority must not be **0**.

In the drop down list Status select the status you want to use for the project.

Note: You can create a drop down menu for the status in the menu item **Start > Properties > Resource > Project status**.

In the drop down list **Baseline** select the baseline you want to use for the variance analysis.

Note: This selection requires you, at first, to save a baseline via the menu item Project > Baseline > Add.

In the drop down list **Time step** select the interval for the automatic rounding of start and finish dates as well as duration.

In the drop down list **Duration** select the measurement unit you want to use for the duration measuring.

In the drop down list **Effort** select the measurement unit you want to use for the effort measuring. On workdays (depend on calendar project) - workdays duration depends on the project calendar On workdays (8-hour workday) – a workday is 8 hours. Choose from the drop down list effort measuring units to use in order to measure the effort. On workdays (depend on calendar project) – a man day depends on the project calendar On workdays (8-hour workday) – a man day is 8 hours.

Activate the check box **Enter activity work results** if you want to display the activity work results using the entering of measurement units and quantities (such as 150 m3).

Activate the check box **Enter activity effort** if you want to display the activity effort using the entering of man-days (such as 5 ED).

In the area **Planning type** you can define whether your project plan will be calculated capacity or due date oriented.

Activate the check box **Capacity oriented**, if the available resources are sufficient and should not be overloaded. It can extend the activity duration and move tasks if assigned employees have nonworking days during the activity time.

Activate the check box **Due date oriented**, if you want to keep the activity and project due date in any case. If assigned employees have nonworking days during the activity time, negative effort is calculated for an activity that has a difference between an effort that is assigned to roles and the effort that is covered by the employee with the requested role.

In the drop down list **Color** select the color you want to use for the project/subproject bars.

Activate the check box **Use the subordinated subprojects and activities** if you want all the project / subproject related activities to be displayed in the same color.

Click on the button OK.

4.2.2 Preferred teams

You can use the tab **Preferred teams** to assign particular teams to the project. In calculating the project the capacity planning for the personnel includes only employees that are members of the **Preferred teams**. You can also edit the list **Preferred teams** later.

ropertie	es											
Name	Project2										Code:	
General	Preferred team	n	Shared machi	ne types Share	d machiner	y Headers and footers	Format	Color	User fields	Notes		
Filter:	Assigned teams: Resource pool											OK
Nr.	Working group	C	Team	Calendar	Nr.	Working group	Code	Team		Calendar		Cancel
11.001	North											
12.001	South											
13.001	East											
14.001	West											

In order to define **Preferred teams, do as follows:**

- Activate the tab Preferred teams in the window Project properties.
- Doubleclick on a team in the left table to define a preferred team.
- Click on the button **OK**.

4.2.3 Define machine types that can be shared

Machine types that can be shared can be used by predefined activities simultaneously without increasing the number of machines.

The costs are not allocated to the individual activities; they are calculated as a whole and for each of the activity separately.

Example 1 (shared machine types) Scaffolding is defined as a shared resource and will be used for several activities, such as window installation or facade plaster. In case of time conflicts of the activities using this resource, the number of the required scaffold is not added up, but remains constant on defined number level.

Example 2 (separately used machine types allocated to activities) A special drilling machine is allocated in the activity properties as machine used for several activities. In case of a time conflict of the activities using this resource, the number of the required machines will be added up.

In order to define shared machine types, do as follows:

• Activate the tab Machine types that can be shared in the window Project properties.

opertie	: Project1											Code:	
General	Preferred team	Shared machine types	Shared mach	inery	Headers and footer	s Format	Color	User field	ls	Notes			
Filter:			- 2	Assigned	machine types:					Reso	ource pool		ОК
Nr.	Machine groups	Machine type		Nr.	Machine groups	Machine type		Q	Ut	Activities	Notes		Cance
12.001	Rotate machine			12.001	Rotate machine			1	100				
13.001	Milling machine												

• Doubleclick on a machine type in the left table to define it as a shared machine type.

- Enter the Number of the required machine types and their Load in the table to the right.
- Click on the button in the column Activities. The dialogue Activities using the same resources opens:

ared resource:	12.01 machine 1					
r. I	lame		C	D	Start	Finish
2 t	isk 4		() 32	28.01.16 08:00	02.02.16 17:00
1.1 t	isk 1		(32	26.01.16 08:00	29.01.16 17:00
1.2 t	ask 2		() 40	01.02.16 08:00	05.02.16 17:00
1.3 t	ask 3		() 32	03.02.16 08:00	08.02.16 17:00

- Select from the activities list the ones that should share the machine type.
- Click on the button OK. The selected activities are entered in the column Activities.
- Click on the button **OK**.

Note:

• You can reduce the drop down list of machine types by entering a string value of the group name, the name or code in the field **Filter**.

The view **Machine types** (tab Project properties) shows each of the shared machine types separately. The table of the selected, commonly usable machine types shows each of the shared machine types separately.

4.2.4 Define machinery that can be shared

Machinerythat can be shared can be used by predefined activities simultaneously without increasing the number of machines.

The costs are not allocated to the individual activities; they are calculated as a whole and for each of the activity separately.

Example 1 (shared machinery) Scaffolding is defined as a shared resource and will be used for several activities, such as window installation or facade plaster. In case of time conflicts of the activities using this resource, the number of the required scaffold is not added up, but remains constant on defined number level.

Example 2 (separately used machinery allocated to activities) A special drilling machine is allocated in the activity properties as machine used for several activities. In case of a time conflict of the activities using this resource, the number of the required machines will be added up.

In order to define a shared machine, do as follows:

• Activate the tab Machinery that can be shared in the window Project properties.

Properties	5														
Name:	Project1													Code:	
General	Preferred to	eam	Share	d machine type	s	Shared machinery	Headers and	foote	ers Format	Color	User fields No	otes			
Assigned mad	hine types:			Filter:			•	1	Assigned machine:			Reso	ource pool		ок
Machine gro	up - Machi	Bal		Machine n	A	Machine group - Machin	Costs		Machine name	Availa	Machine group - M	. Util	Activities	No	Cancel
☑ Rotate ma	chine	0		machine 1	100	Rotate machine	0.00		machine 1		Rotate machine	100			
															-
Preferred to	eams			Check avail	ability	in current portfolio									

- Doubleclick on a machine in the left table to define it as a shared machine.
- Enter the **Load** of the required machines in the table to the right.
- Click on the button in the column Activities. The dialogue Activities using the same resources opens:

ared resource:	12.01 machine 1				
۱r.	Name	C	D	Start	Finish
2	task 4	0	32	28.01.16 08:00	02.02.16 17:00
1.1	task 1	0	32	26.01.16 08:00	29.01.16 17:00
1.2	task 2	0	40	01.02.16 08:00	05.02.16 17:00
1.3	task 3	0	32	03.02.16 08:00	08.02.16 17:00

- Select from the activities list the ones that should share the machines.
- The selected activities are entered in the column Activities.
- Click on the button **OK**.

Note:

• You can reduce the drop down list of machines by entering a string value of the group name, the name or code in the field Filter.

The view Machinery (tab Project properties) shows each of the shared machines separately.

The table of the selected, commonly usable machinery shows each of the shared machines separately.

4.2.5 Define header and footer

You can use the header and footer to define the print format of a project schedule. In this case, you do not have to set the headers and footers for each of the pages separately, but all at once.

You can adjust titles (left-top, ... right-bottom, see below) to your requirements.

Properties						
Name: Project1	1				Code:	
General Preferred team	n Shared matchine types	Shared machinery Heade	rs and footers Format Col	or Userfields Notes		
Fields: View name	· >		Vannoisst nor	no0/		ОК
Times New Roman	· 12 ·	-	⁷⁰ project_nan			Cancel
Bold			_			
🗌 Italic				ß	illsoft °	

In order to define the headers and footers of a project, do as follows:

- Activate the tab Headers and footers in the window Project properties.
- Click on one of the fields and enter your text or select a predefined field in the drop down list Fields.
- If necessary, repeat Step 2 for all the other fields.
- Click on the button **OK**.

Table fields:

View name	Name of the view
Project name	name of the project
Project start time	Time of the project's beginning
Project start date	Date of the project's beginning
Project ending time	Time of the project's ending
Project end date	Date of the project's ending
Project costs	Total costs
Project effort	Total effort
Project user defined fields	Free defined fields for project information
Subproject name	Name of the subproject
Subproject start time	Time of subproject's beginning
Subproject start date	Date of subproject's beginning
Subproject ending time	Time of the subproject's ending
Subroject end date	Date of the subproject's ending
Subproject costs	Total costs
Subproject effort	Total effort
Subproject user defined fields	Free defined fields for subproject information
Cut-off date time	Time of the project's cut-off date
Cut-off date	Date of the project's cut-off
Last saving time	Time of the last project's saving
Last saving date	Date of the last project's saving
Printing time	Time of the project's printing
Printing date	Date of the project's printing

Note:

• You can print all the project views.

• You can format the texts in the individual fields by means of the corresponding functions.

4.2.6 Define format

You can define the bar labelling and colour for activities and subprojects at your convenience.

In order to define the format, do as follows:

• Activate the tab Format in the window Project properties.

operties										
Name: Project1									Code:	
General Preferred	team Shared machine types	Shared mach	inery	Headers and footers	Format	Color	User fields	Notes		
Fields:			Bar labellin	g:						ОК
Name	Description		Туре	Position	Content					Cancel
%name%	Name		Activity	Top left						
%long_name%	Name mit Nr.		Activity	Bottom left						
%parent_name%	Name des oberen Teilprojekts		Activity	Top right	%name%					
%top_parent_name%	Name des obersten Teilprojekts		Activity	Bottom right						
%all parent name%	Namen der oberen Teilprojekte	-	Activity	Bottom					•	

You can use the area Bar labelling to define the bar labelling of activities and subprojects.

- The Type column shows which object an activity or a subproject is labelled.
- The **Position** column indicates the labelling position.
- The **Content** column indicates the selected labelling.
- Set the cursor on the area **Bar labelling** according to the required position in the corresponding row.
- Then switch to area Fields and choose a variable that should be integrated into the labelling.
- By double-clicking it will be copied in the field Bar labelling.
- Finally, click on the button **OK**.

4.2.7 Define color

You can define the bar color for the activities and subprojects at your convenience.

To define the color depending on resources:

1. Activate the Color in the project properties window.

Name: software General Preferred Bar color depending on re	e development process d team Shared machine ty resources	/pes Sha	ared machinery	Headers and footers Restore	Format Color Place Automatically	Userfields	Notes Up	Code:	ОК
General Preferred Bar color depending on re	d team Shared machine ty resources	/pes Sha	ared machinery	Headers and footers Restore	Format Color Place Automatically	User fields	Notes Up	Down	ОК
Bar color depending on re	resources			Restore	Place Automatically		Up	Down	ОК
Terr									
Type Name		Costs	Color						Cancel
Role analyst		70.00							
Role designer	r	60.00							
Role manager	r	60.00							
Role programm	mer - C++	50.00							
Role programm	mer - PHP	45.00						•	

2. If you click the right mouse button on the table area, you can define which columns appear in the table.

Propertie	S									
Name:	software developme	ent proces	s					Code	e:	
General	Preferred team	Shared	machine types	Shared machinery	Headers and footers	Format Color	User fields	Notes		
Bar color dep	ending on resources				Restore	Place Automatically	Up	Dow	ı I	ОК
Туре	Name		Nr.	Color						Cancel
Role	analyst	\checkmark	Туре							
Role	designer		Name							
Role	manager	Ľ	Code							
Role	programmer - C++		code							
Role	programmer - PHP	\checkmark	Costs						-	
		\checkmark	Color							

- 3. The column **Type** indicates whether there is a role, team, employee, or machine.
- 4. The column Name includes resources that are planned in the project/portfolio.
- 5. After clicking the left mouse button on the preferred row of column **Color** and pressing the button with three dots, you can set color for activities, where the resource, such as Project management, is planned.

ing 5	14.12.10 11:00 21.12.10 11:00	U		Farbe	
est 1.25	14.12.10 11:00 15.12.10 14:00	0			
lev 2.63	14.12.10 11:00 16.12.10 17:00	0		Grundfarben:	software development library
Inv 1 E	17 10 10 00 00 00 10 10 10 00	0			
Propertie	es				
1.1					
Name	software development process				Code:
General	Preferred team Shared machine	types Sł	hared machinery		User fields Notes
Bar color de	pending on resources				Up Down OK
Туре	Name	Costs	Color	Benutzerdefinierte Farben:	Cancel
Role	designer	60.00			
Role	manager	60.00			
Role	programmer - C++	50.00			
				Earben detinieren >>	
Role	programmer - PHP	45.00			

- 6. If, for example, two different colours of an activity are associated with defined resources, the activity is represented by the resource color, which is on a higher position in the list.
- 7. Restore delete all of the dependency rules.
- 8. Set automatically -distribute resources colors automatically.
- 9. Up increase the resource priority in the color allocation.
- 10. Down reduce the resource priority of in the color allocation.
- 11. Click on the button **OK**.

4.2.8 Create user-defined fields

You can view user-defined fields in the tables or print them.

In order to create an user-defined field, do as follows:

• Activate the tab User-defined fields in the window Project properties.

Prop	ertie	5										
	Name:	software developm	ent proc	ess							Code:	
Ge	eneral	Preferred team	Share	d machine types	Shared machinery	Headers and footers	Format	Color Us	ser fields	Notes		
Nr	Name	1		Text								ОК
1	Persor	n of charge										Cancel
2												
4												
5												
•											T	

- Enter the field name in the Name column.
- Enter your information in the Text column.
- Click on the button **OK**.

Use formula

You can enter the project variable in user field and use formula.

Name: Project1								Code:	
General Preferred	team Shared machine types	Shared	machinery	Headers and foote	rs Format Color	User fields	Notes		
ields:			Bar labelling:						OK
Name	Description		Туре	Position	Content				Cancel
%name%	Name		Activity	Top left					
%long_name%	Name with Nr.		Activity	Bottom left					
%parent_name%	Name of the upper subproject		Activity	Top right	%name%				
%top_parent_name%	Name of the top subproject		Activity	Bottom right					
%all_parent_name%	Name of the upper subprojects		Activity	Bottom					
%project_category%	Project category		Subproject	Top left					
%project_status%	Project status		Subproject	Bottom left					
%project_priority%	Project priority		Subproject	Top right	%name%				
%code%	Code		Subproject	Bottom right					
%start_time%	Start time		Subproject	Bottom					
%start_date%	Start date								
%finish_time%	Finish time								
%finish date%	Finish date	-							

Enter a formula in the project properties window in the tab User fields in the column Text.

In the formula you can use almost all the fields from the register Format.

Following basic operations +, -, x, / are available.

4.2.9 Enter notes & links

You can use this tab to enter your own notes and assign external links to the project / subproject or link the project / subproject to document or graphic files. You can use the following key words for links:

- http:// for hyperlinks
- https://
- mailto:
- ftp://
- news:
- telnet:

• file: for document and graphic files

You may proceed as follows:

· Activate the tab Notes in the window Project/subproject properties

Properties	
Name: software development process	Code:
General Preferred team Shared machine types Shared machinery Headers and footers Format Color User fields Notes	
Insert hyperlink to external document	ок
file://D:\01 RP\schema.pdf	Cancel
1 2	

- Enter the text of your notes.
- If you click the Add hyperlink to external document button, you can create a reference to an internal file.
- If you click the Add hyperlink to external folder button, you can create a reference to an internal folder.
- To add a reference to external website, enter the required Internet address such as: http://www.rillsoft.de/
- Click on the button **OK**.

Alternatively: If you rightclick on the tab field in **Notes**, you can select one of the following commands in the context menu.

>	Undo	Alt+Backspace
Ж	Cut	Shift+Delete
Ē	Сору	Ctrl+C
Ĉ	Paste	CtrI+V
	Clear	
	All select	Ctrl+A

4.2.10 Documents(DMS)

DMS (Document Management System) is only available in the database-based solution Rillsoft Project with Rillsoft Integration Server.

Click on	Start >	Properties	>	Project.
----------	---------	------------	---	----------

R 🖥 📁	<u>ि २ ५</u> वि	r 🖡	GANTT CH	IART							
FILE	FILE START PROJEC		T FORMA	FORMAT							
Gantt chart	📲 Network di	agram vork chart	© Time ♣♣ Effort ➡■ Cost	Employ	Role Team ee Mother •	Employee	Resource chart • Cost chart • Gantt chart	* Save I ■ Manage Show *	Project Resource		
	Activity views		Variance analysis	Reso	ource views	Capacity views	Additional view	User views	Properties		

At the bottom of the Properties window, select the tab Documents.

On this tab you will see information divided into two sections.

Properties				1	Code	
General Preferred team Shared machine types Shared machinery Add Delete Download	Headers and footers Format	Color Userfield	s Notes 🗸 Doc	uments		ОК
Hauptordner (2)	File name 👻	Description	Size	Last modified	Author	Cancel
	appendix_e.pdf		2 456.20 KB	27.05.19 19:17	Demo Demo	
□ □ Dokumentation	critere_propel.pdf		70.18 KB	27.05.19 19:17	Demo Demo	
- 🖨 Email	3					
E Foto						

The left pane shows a document-directory structure. Next to a directory name is the number of added documents.

When you click on a directory name, you will get a directory content with brief information in the right area.

You can edit documents by corresponding button:

- Add
- Delete
- Download
- Update

Drog & Drap You can use this function here by dragging selected documents into the right area with the left mouse button pressed down. For example, email messages directly from Outlook to Rillsoft Project DMS.

Documnets manage in project or portfolio

All documents assigned to a project or portfolio can be managed in the dialog Rillsoft Integration Server Document.

Click on Project > Rillsoft Integration Server > Project documents.

F	3 🛁	<u>ا ج م ال</u>	- ₹	GANT	CHART			softw	are development process	
	FILE	START	PRO		MAT			and the second		
	1	📕 Earliest star	rt date	Employee *	늘 Add		🖅 Resource pool	Save on workplace	Save settings	Cross-project links
	•	🕨 Latest start	date	Machine *	🖕 Select		📰 Project resources	Copy from workplace	A Save headers and footer	Project documents
	Take over	Other function	s *	Split activity	🍋 Delete	Resource	S		Save user views	Save report data
		Schedule		Assistant	Baseline	P	roject resources	Project settings	Rillsoft integr	ation server

Here you can also filter out any documents.

Rillsoft integration server document									×
Add Delete	Download	Update	Filter.						
Root Folder (1)	Nr.	Project	Subproject/Activity	Code	File name 🔹 👻	Description	Size	Last modified	Author
□-□ 2020	1.1	software developm	Activity: software development pl		softwaredevelopme		17.62 KB	24.02.21 15:56	Admin
Contracts									
2021									
All documents	•								Þ
		OK	Canaal						
		OK	Cancel						

Folder structure

You can define a folder structure in Rillsoft Integration Server.

Rillsoft Inte	gration Server 8.30.0								
	ADMINISTRATIO	N	PROJ	ECTS	RES	OURCE POOL	◆ADD-ONS		
	Lients	😓 Client release		Projects		Employee role	Calendar	Retention period •	Import System *
Users	🔓 Organisation chart	🧞 User roles	Locks	Portfolio	Employees	s 🔒 Teams	8 E-mail Notification ▼	🔓 LDAP	🔝 Timeline
	illia Folders	🗾 Folder roles		🗟 Links			🔄 Vacation 💌	편 Timesheet 💌	DMS -
									Documents
Documents									Folder structure
Client: EN	2016 👻	Login							
Folder struct	ture			Action	Numb	er of documents			
🔻 🚄 Root F	Folder			2×4	1				
🔻 🚄 20	20			2 X 📫	P 0				
	Offer			🛛 🗙 📫	0	Click on the Direc	tory with plus w subdirectory		
<u></u>	Contracts			🔁 🗙 📫	0				
<u></u>	Technical documents			2 × 📫	1				
<u></u>	🚔 E-Mails				1				
<i>i</i> 20	21			🕑 🗙 🚅	0				

4.3 Settings for project and programme

4.3.1 Save settings in the workplace

The following settings can be saved in the workplace and used thereafter as default settings for other projects.

- Project properties as units of duration and effort etc.
- Arrangement of columns in tables
- Time scale representation

First you can adjust them according to your needs and then save by clicking on **Project > Project settings > Save in the workplace**.

R <mark>e</mark> 🧀	⊟ 5 ở ⊡*∓	GANTT CHAI	रा		Unbenani	nt - [Project1]		- [□ ×
FILE	START PROJECT	FORMAT							^
./	📕 Earliest start date	Employee 🝷	늘 Add	Resource pool	🖏 Save on workplace	#볼 Save settings	🗔 Cross-project links		
	Latest start date	Machine 💌	🖕 Select	Project resources	₩ Copy from workplace	A _■ Save headers and footers			
over	Other functions 🔹	E Split activity	峯 Delete	Resources		Save user views			
	Schedule	Assistant	Baseline	Project resources	Project settings	Integration	server		

4.3.2 Copy settings from the workplace

If you have previously set the settings and saved them in the workplace, you can take them for an open project by clicking on **Project > Project settings > Copy from the workplace**.

Re 🛁	ء 🕤 🖒 🗗 🗄	GANTT CHAP	RT			Unbenanr	nt - [Project1]		- [- ×
FILE	START PROJECT	FORMAT								^
1	Earliest start date	Employee -	늘 Add		🖅 Resource pool	Save on workplace	Save settings	Cross-project links		
	🕨 Latest start date	Machine 🝷	🖕 Select		🗐 Project resources	Copy from workplace	A _■ Save headers and footers			
over	Other functions 🔹	Split activity	🍋 Delete	Resources			Save user views			
	Schedule	Assistant	Baseline	Pro	ject resources	Project settings	Integration	server		

The following settings can be saved in the workplace and used thereafter as default settings for other projects.

- Project properties as units of duration and effort etc.
- Arrangement of columns in tables
- Time scale representation

You can set project properties in the object properties window.

Properties	;				
Name:	2016_2_soft			Code:	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color	User fields Notes	
- Due date	Date Time 28.03.16 * 00:00 05.06.16 * 00:00	Project calendar: 1 Standard 40-hour work we * Category: • Not selected • * 100 Status: • Not selected •	Project settings	Planning type © Capacity oriented Due date oriented Color: Automatic color	OK Cancel
Cutoff date:	18.04.16 - 00:00	Baseline: BP 2 *	Enter effort for activity(Example: 5 man-hours)	Use for subordinated subprojects and activities	

4.4 Settings for project with Rillsoft Integration Server

4.4.1 Save settings for project

This function is offered only in the Rillsoft with interface to Rillsoft Integration Server Solution.

The option is active, if settings are set either **per client** or **per user of client** in the client properties.

Client						⊗
K Main Pro	oject settings	iCalendar	Retention period	Import System	Timeline	Vaca 🔪
Settings for project: Settings for header and footer: Settings for user view:	per client per project/poo per user of clien per client per client	rtfolio ent				•
					Submit	Cancel

In order to save the settings for a project, please click on **Project > Rillsoft Integration Server > Save settings**.

R 🖥 🦵	🗄 ५ ५ 💷 म	GANTT CHART			Unbena	nnt		-	×
FILE	START PROJECT	FORMAT							^
1	Earliest start date	Employee 🝷	늘 Add	Resource pool	Save on workplace	#봅 Save settings	Cross-project links		
	🕨 Latest start date	Machine 🔹	崔 Select	Project resources	🏶 Copy from workplace	A _■ Save headers and footers			
over	Other functions 🔹	Split activity	峯 Delete	Resources		Save user views			
	Schedule	Assistant	Baseline	Project resources	Project settings	Integration	server		

The following settings can be used as default settings for other projects.

- Project properties as units of duration and effort etc.
- Arrangement of columns in tables
- Time scale representation

You can set project properties in the object properties window.

Properties	5				
Name:	2016_2_soft			Code:	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color	User fields Notes	
Due date	.	Project calendar:	Project settings	Planning type	ОК
	Date Time	1 Standard 40-hour work we 👻	Time step: 1 hour +	Capacity oriented	Const
Start:	28.03.16 ~ 00:00	Category: Priority:	Duration: in workdraw/dependent on project or a	O Due date oriented	Cancel
Finish:	05.06.16 - 00:00	- Not selected - VIIII	In workdays(dependent on project c		
		Status:	Effort: in hours *	Color: Automatic color 🔻	
		- Not selected -	innous		
		Baseline:	Enter deliverable for activity(Example: 150 M ²)	 Use for subordinated subprojects and activities 	
Cutoff date:	18.04.16 - 00:00	BP 2 *	Enter effort for activity(Example: 5 man-hours)	and activities	

4.4.2 Save settings for header and footer

This function is offered only in the Rillsoft with interface to Rillsoft Integration Server Solution.

The option is active, if settings for header and footer are set either **per client** or **per user of client** in the client properties.

Client						⊗
K Main Pro	oject settings	iCalendar	Retention period	Import System	Timeline	Vaca 🔪
Settings for project:	per client					•
Settings for header and footer:	per user of clie	ent				•
Settings for user view:	per client					~
		•				
					Submit	Cancel

In order to save the settings for header and footer, please click **Project > Rillsoft Integration Server > Save headers** and footers.

🛐 🚔 🔒 🏷 🔊 📑 🗧 GANTT CHART					- 🗆 ×			
FILE	FILE START PROJECT FORMAT				^			
Earliest start date		Employee 🝷	늘 Add	Resource pool	🖏 Save on workplace	* Save settings	Cross-project links	
Latest	🕨 Latest start date	Machine 🔻	🖕 Select	Project resources	🏶 Copy from workplace	A _■ Save headers and footers		
over	Other functions 🔹	Split activity	🍋 Delete	Resources		Save user views		
Schedule		Assistant	Baseline	Project resources	Project settings	Integration	server	

You can set headers and footers rows in the object properties window in the folder Headers and footers.

4.4.3 Save settings for user view

This function is offered only in the Rillsoft with interface to Rillsoft Integration Server Solution.

The option is active, if settings for user view are set either **per client** or **per user of client** in the client properties.

Client						8
K Main Pro	oject settings	iCalendar	Retention period	Import System	Timeline	Vaca 🔪
Settings for project:	per client					-
Settings for header and footer:	per user of clie	ent				•
Settings for user	per client					
view.	per project/por per user of clie per client	tfolio ent				
					Submit	Cancel

In order to save the settings for user view and to use them therefore as default views for other projects, please click on **Project > Rillsoft Integration Server > Save user view**.

🛐 🛁 🖯 🔿 🔿 📷 🔻 🛛 GANTT CHAI			RT		-	×						
	FILE	START	PROJECT	FORMAT								^
	1	K Earliest	tart date	Employee 🝷	늘 Add		🔠 Resource pool	🖏 Save on workplace	#∰ Save settings	Cross-project links		
		🕨 Latest st	art date	Machine 🔹	🖕 Select		🖅 Project resources	🏶 Copy from workplace	A Bave headers and footers			
	over	Other functi	ons 🔹	Split activity	峯 Delete	Resources	i		📲 Save user views			
Schedule			Assistant	Baseline	Pr	oject resources	Project settings	Integration	server			

You can save user view by using the command **Start > user views > Save**.

R C C C C C C C C C C C C C C C C C C C	GANTT CHART				Unbenannt					- □ ×
Gantt Chart Gantt-network chart	Employee Cother Cother Resource views	Employee Machine	Acost chart •	Save Save Manage Show ~ User views	Project Resource Properties	0× 25× 50× 75× 100×	t⊐ Activity ◄ t⊐ Subproject ◄ دی Link ◄ Insert	Structure Outline	▼ ▲ ▼ ▼ ▼ ₩ ◆ Edit	 Cutoff date Current date Project start Scrolling

4.4.4 Project documents

This feature is only offered in the Rillsoft solution with interface to Rillsoft Integration Server.

To open the project documents of a project, please click **Project > Rillsoft integration server > Project documents**.

🕫 📁 🖯 🔿 🔿 🗔 🕫				CHART	software development process				
	FILE	START PRO		4AT			and the second		
	1	K Earliest start date	Employee 🔹	늘 Add		🖅 Resource pool	Save on workplace	Save settings	Cross-project links
	•	🔰 Latest start date	Machine *	🖕 Select	.t	🚮 Project resources	Copy from workplace	A Save headers and footer	Project documents
	Take over	Other functions 🔹	Split activity	峯 Delete	Resource	S		Save user views	Save report data
		Schedule	Assistant	Baseline	P	roject resources	Project settings	Rillsoft integr	ation server

The dialog box Rillsoft integration server document opens.

Rillsoft integration server document								×
Add Delete	Download	Update	Filter.					
Content Folder (1)	Nr.	Project	Subproject/Activity	Code	File name 🔹 👻	Description Siz	e Last modified	Author
□	1.1 \$	software developm	Activity: software development pl		softwaredevelopme	17.62 k	B 24.02.21 15:56	Admin
Contracts								
E-Mails (1)								
2021								
	4							
All documents	4							
		ОК	Cancel					

The following activities are available:

- Add add a document directly to the project
- Delete delete a selected document from the project
- Download save a selected document as a separate file
- Update update a selected document

You can set project properties in the properties window.
4.5 Project information

4.5.1 Project information

Click on **Start > Properties > Info** to display project information.



Alternatively you can

1. click with the left mouse button on a free space in the Gantt chart or one of the other views. The window with information appears at the bottom of the program window.

Nr.	Name	Dur	Start	Finish	Co	45	46	47	48	49	50
⊟ 1	project planning and oversight	14.38	07.11.16 08:00	28.11.16 11:00	0				project plan	ning and over	sight
1.1	software development planning	2.25	07.11.16 08:00	09.11.16 10:00	0	soft	ware development	planning			
1.2	system test planning	4.75	07.11.16 08:00	11.11.16 15:00	0		system test plann	ing			
1.3	software installation planning	5.63	14.11.16 08:00	24.11.16 12:00	0			softwa	are installatior	l planning	
1.5	software transition planning	3	18.11.16 08:00	22.11.16 17:00	0		4	software t	ransition plan	ning	
1.7	following and updating plans	1.88	24.11.16 13:00	28.11.16 11:00	0			}	H following an	d updating pla	ins
2	establishing a software devel	9	28.11.16 11:00	09.12.16 11:00	0	1			•	es	tablishing a softv
2.1	software engineering environm	5	28.11.16 11:00	05.12.16 11:00	0			-		ы software e	ngineering enviro
2.2	software test environment	1.25	28.11.16 11:00	29.11.16 14:00	0		<u> </u>		software	test environm	ent
2.3	software development library	2.63	28.11.16 11:00	30.11.16 17:00	0			4	softwa	re developme	nt library
2.4	software development files	4.5	01.12.16 08:00	07.12.16 12:00	0				Ge e	softwa	are development i
2.	Select one of the tabs.					μ					
4	2	_									
0	Selected portfolio:										
Late a	ctivities Overallocated resources	Fa	ailed resources	Unassigned resour	rces	Project over	erview Portfolio	dashboard E	External documen	ts	

4.5.2 Late activities

Click on **Start > Properties > Info** to display late activities.



Select the tab Late activities.

operties									
)		•							
Late activities	Overallocate	d resources Failed resources ! I	Jnassigned res	ources Partial	ly assigned resourc	ces Portfolio da	ashboard Cross-project lir	ks	
					_		1		
Conflict	Nr.	Name	Effort	Negativ effort	Duration	Start		Bilanz employee	Bilanz machine
93.88 work-day	1.1.1.2	Project procedure	120	0	15	09.09.16 08:00	29.09.16 17:00	-120	0
92.88 work-day	1.1.3.1	Create the order plan	96	0	6	09.09.16 08:00	16.09.16 17:00	-96	0
93.88 work-day	1.1.1.3	Completing the construction schedule	96	0	6	09.09.16 08:00	16.09.16 17:00	-96	0
07.00	1.1.1.4	Create task lists	128	0	16	19.09.16 08:00	11.10.16 17:00	-128	0
o7.oo work-day						00.00.10.00.00	20.00.10.17.00	10	0 V

Late activities indicate that a project plan has not been updated by a completed percentage, but a deadline has been postponed.

You can find the following information about late activities in the window:

Conflict shows a difference between the timepoint of an activity, where the activity is not yet completed, and the deadline in working days.

Nr. - activity number

Name - activity name

Effort - general activity effort for all assigned resources

Negative Effort - shows the difference between an effort assigned to roles and the effort covered by employees. As an example. If a role with 24 Ph (3 AT) is first assigned to an activity and then to an employee who can fulfil this role. However, the employee has a nonworking day over the activity time and can fulfil only 16 Ph (2 AT). The negative effort is 24 - 16 = 8 Ph.

Duration - activity duration

Start - start of activity

Finish - end of activity

Balance employee - contains the dynamically calculated difference between the requested effort for a role and the summarized effort of the already assigned employees with the same role and qualification. This serves as support during the controlling of the required assignations of employees. A negative value, for instance, indicates that more employees with this role and qualification are required.

Balance machine - contains as a dynamic calculation the difference between the requested effort for the machine type and the summed effort of the already assigned machines of the same machine type. This serves as a support for checking the necessary machine assignments. A negative value shows you, for example, that more machines of this machine type are needed.

4.5.3 Overallocated resources

Click on Start > Properties > Info to get a quick overview of activities with overallocated resources



Select the tab Overallocated resources.

Iteate activities Iteate activities Iteate activities Iteate activities Iteate activities Project overview Potfolio dashboard External documents Conflict Nr. Name Effort N Dur Start	Remove	Reload								operties Selected portfolio:
Conflict Nr. Name Effort N Dur Stat Finish 3 AT 200 % - 20.02 Think 1.4 software installation planning 72 0 4.5 18.11.16 08:00 24.11.16 12:00 3 AT 200 % - 20.02 Think 1.5 software installation planning 24 0 3 18.11.16 08:00 22.11.16 17:00 1 AT 200 % - 14.01 Diligent 2.2 software test environment 10 0 1.25 28.11.16 11:00 29.11.16 14:00 1 AT 200 % - 14.01 Diligent 2.1 software engineering environment 80 0 5 28.11.16 11:00 05.12.16 11:00		mal documents	ard Exte	ishboard	rtfolio da	Po	rview	Unassigned resources Project o	d resources	Late activities Overallocated resources Fai
3 AT 200 % - 20.02 Think 1.4 software installation planning 72 0 4.5 18.11.16 08:00 24.11.16 12:00 3 AT 200 % - 20.02 Think 1.5 software transition planning 24 0 3 18.11.16 08:00 22.11.16 17:00 1 AT 200 % - 14.01 Diligent 2.2 software test environment 10 0 1.25 28.11.16 11:00 29.11.16 14:00 1 AT 200 % - 14.01 Diligent 2.1 software engineering environment 80 0 5 28.11.16 11:00 05.12.16 11:00	B	Finish	t 👻	Start	Dur	N	Effort	Name	Nr.	Conflict
3 AT 200 % - 20.02 Think 1.5 software transition planning 24 0 3 18.11.16 08:00 22.11.16 17:00 1 AT 200 % - 14.01 Diligent 2.2 software test environment 10 0 1.25 28.11.16 11:00 29.11.16 14:00 1 AT 200 % - 14.01 Diligent 2.1 software engineering environment 80 0 5 28.11.16 11:00	0	24.11.16 12:00	1.16 08:00	18.11.	4.5	0	72	software installation planning	1.4	3 AT 200 % - 20.02 Think
1 AT 200 % - 14.01 Diligent 2.2 software test environment 10 0 1.25 28.11.16 11:00 29.11.16 14:00 1 AT 200 % - 14.01 Diligent 2.1 software engineering environment 80 0 5 28.11.16 11:00 05.12.16 11:00	-24	22.11.16 17:00	1.16 08:00	18.11.	3	0	24	software transition planning	1.5	3 AT 200 % - 20.02 Think
1 AT 200 % - 14.01 Diligent 2.1 software engineering environment 80 0 5 28.11.16 11:00 05.12.16 11:00	-10	29.11.16 14:00	1.16 11:00	28.11.	1.25	0	10	software test environment	2.2	1 AT 200 % - 14.01 Diligent
	-80	05.12.16 11:00	1.16 11:00	28.11.	5	0	80	software engineering environment	2.1	1 AT 200 % - 14.01 Diligent

Note Only one conflict is listed for each activity. You can get detailed information about overallocated resources either on the resources view **Employee** or on the tab **Employee** in the properties window of an activity.

In the window Overallocated resources you can find the following information:

Conflict displays an overloaded employee, the number of days of overload, and its overallocation in percentage within activity duration.

Nr. - activity number

Name - activity name

Effort - general activity effort for all assigned resources

Negative Effort - shows the difference between an effort assigned to roles and the effort covered by employees. As an example. If a role with 24 Ph (3 AT) is first assigned to an activity and then to an employee who can fulfil this role. However, the employee has a nonworking day over the activity time and can fulfil only 16 Ph (2 AT). The negative effort is 24 - 16 = 8 Ph.

Duration - activity duration

Start - start of activity

Finish - end of activity

Balance - contains the dynamically calculated difference between the requested effort for a role and the summarized effort of the already assigned employees with the same role and qualification. This serves as support during the controlling of the required assignations of employees. A negative value, for instance, indicates that more employees with this role and qualification are required.

4.5.4 Failed resource

Click on Start > Properties > Info to display failed resources



Select the tab Failed resource.

roperties								
Selected portfolio:							Reload	d Remov
Late activities Overalloca	ated resources	Failed resources Unassigned resources Project over	rview P	ortfolio dashboard	External de	ocuments		
Conflict	Nr.	Name	Effort	Negativ effort	Duration	Start 👻	Finish	Balance
1 AT 100 % - 17.02 Eager	1.4	software installation planning	36	-8	4.5	18.11.16 08:00	24.11.16 12:00	-36
1 AT 100 % - 21.01 Consider	2.4	software development files	36	-8	4.5	01.12.16 08:00	07.12.16 12:00	0
		N						

In the window you can find general information about failed resources.

Note If there are multiple conflicts in the activity due to a resource failure, only one conflict is listed. For detailed information see **Activity Properties** on the tab **Personal** in the column **Negative Effort**.

roperties		~																			
1.4 Name:	software instal	lation planning								Code		Fixed	Dur	ation	Ŧ	Effort	:	36 Ph	Duration:	4.5	AT (8 Hrs.)
General 🗸 Roles	 Employee 	Timesheets	Materi	al	Machine type	в	Machinery	Links	For	mat	User	r fields	Notes								
Preferred teams		Filter:					Ŧ	5	Assigned	employ	ees:				[I	Resource	pool		ОК
Role - qualification	Bal	Name	0	A	Role - qualif	Pr	Costs		Name	0	A	Role - q	Pr	Util	Ad	A	Effort	Neg	Substitutio	N	Cance
✓ programmer - C++	0	Tidy, John	0	100	programmer	100	40.00		Eager	78	100	program	100	100			36	-8			
analyst	-36	Sleeper	100	100	programmer	100	50.00														
		Eager	78	100	programmer	100	50.00												•		
		Slow	100	100	programmer	100	50.00														
		Fast	100	100	programmer	100	50.00	-	4												

Conflict shows the number of employees who have failed because of the nonworking days, the number of their nonworking days, and their absence in percentages within activity duration.

Nr. - activity number

Name - activity name

Effort - general activity effort for all assigned resources

Negative Effort - shows the difference between an effort assigned to roles and the effort covered by employees. As an example. If a role with 24 Ph (3 AT) is first assigned to an activity and then to an employee who can fulfil this role. However, the employee has a nonworking day over the activity time and can fulfil only 16 Ph (2 AT). The negative effort is 24 - 16 = 8 Ph.

Duration - activity duration

Start - start of activity

Finish - end of activity

Balance - contains the dynamically calculated difference between the requested effort for a role and the summarized effort of the already assigned employees with the same role and qualification. This serves as support during the controlling of the required assignations of employees. A negative value, for instance, indicates that more employees with this role and qualification are required.

Note Failed Resources can only be seen in a Due date oriented.

Properties	5				
Name:	2016_2_soft			Code:	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color I	User fields Notes	_
Due date	Date Time	Project calendar: 1 Standard 40-hour work we *	Project settings Time step: 1 hour	Planning type	OK
Start: Finish:	28.03.16 × 00:00 05.06.16 × 00:00	Category: Priority: - Not selected - 100	Duration: in workdays(dependent on project c *	Due date oriented	Calice
		- Not selected -	Effort: in hours	Color: Automatic color Use for subordinated subprojects	
Cutoff date	: 18.04.16 * 00:00	BP 2 •	Enter effort for activity(Example: 5 man-hours)	and activities	

4.5.5 Unassigned resources

Click on Start > Properties > Info to get a quick overview of activities with unassigned resources



Select the tab Unassigned resources.

Operties Selected pottfolio							Re	load B	amova
Late activities ! Overallocated resources	s I Failed re:	sources ! Unassigned resources Project overvi	ew P	ortfolio dashboard	Externa	al documents			SINOVO
Conflict	Nr.	Name	Effort	Negativ effort	Duration	Start 👻	Finish	Balance	*
38 Ph - 14.001 designer	1.2	system test planning	76	0	4.75	07.11.16 08:00	11.11.16 15:00	-76	Ξ
18 Ph - 13.001 manager	1.1	software development planning	54	0	2.25	07.11.16 08:00	09.11.16 10:00	-54	
9 Ph - 11.001 programmer - C++	1.3	software installation planning	18	0	1.13	14.11.16 08:00	15.11.16 09:00	-18	
36 Ph - 15.001 analyst	1.4	software installation planning	36	-8	4.5	18.11.16 08:00	24.11.16 12:00	-36	
24 Ph - 14.001 designer	1.5	software transition planning	24	0	3	18.11.16 08:00	22.11.16 17:00	-24	
15 Ph - 11 003 programmer - V Pasio	17	following and updating plans	15	0	1.88	24.11.16 13:00	28.11.16 11:00	-15	-

In the window Unassigned resources you can find the following information:

Conflikt shows a role effort that has not yet been covered with employees and the assigned role for this effort.

Nr. - activity number

Name - activity name

Effort - general activity effort for all assigned resources

Negativ Effort - shows the difference between an effort assigned to roles and the effort covered by employees. As an example. If a role with 24 Ph (3 AT) is first assigned to an activity and then to an employee who can fulfil this role. However, the employee has a nonworking day over the activity time and can fulfil only 16 Ph (2 AT). The negative effort is 24 - 16 = 8 Ph.

Duration - activity duration

Start - start of activity

Finish - end of activity

Balance - contains the dynamically calculated difference between the requested effort for a role and the summarized effort of the already assigned employees with the same role and qualification. This serves as support during the controlling of the required assignations of employees. A negative value, for instance, indicates that more employees with this role and qualification are required.

4.5.6 Partially assigned resources

Click on Start > Properties > Info to display partially assigned resources



Select the tab **Partially assigned resources**.

operties						1				
Selected portfolio:						/				Reload Remove
Late activities Overallocated	l resource	s Failed resources	! Unassigne	ed resources ! Inc	consistent res	ources Pro	ject overview	Portfolio dashboard	External docum	ents
Conflict	▼ Nr.	Name	Effort	Negativ effort	Duration	Start	Finish	Bilanz employee	Bilanz machine	
16 man-hour - 12.001 writter	2	activity B	16	0	2	31.10.19 08:00	01.11.19 17:00	-16	0	
8 man-hour - 14.001 designer	1	activity A	8	0	1	30.10.19 08:00	30.10.19 17:00	-8	0	

The warning about Partially assigned resources comes only if two situations occur together:

- · firstly, if mixed resources have been assigned to a task, such as roles and employees
- secondly, if the role effort planned in the process was not completely covered but partly covered with employees

In this case, a conflict arises because an employee assignment has a higher priority in Rillsoft Project. That when calculating the effort of the activity, only one employee expense is included in the calculation, and the role effort is not taken into account.

Tip! It is better to either assign only the roles to an activity or cover the role requirements required by the activity completely with responsible employees.

The following information about conflict because of inconsistent resources can be found in the window:

Conflikt shows the role assigned to a task that did not have employee coverage while concrete persons were already assigned to this task.

Nr. - activity number

Name - activity name

Effort - general activity effort for all assigned resources

Negativ Effort - shows the difference between an effort assigned to roles and the effort covered by employees. As an example. If a role with 24 Ph (3 AT) is first assigned to an activity and then to an employee who can fulfil this role. However, the employee has a nonworking day over the activity time and can fulfil only 16 Ph (2 AT). The negative effort is 24 - 16 = 8 Ph.

Duration - activity duration

Start - start of activity

Finish - end of activity

Balance Employee - contains the dynamically calculated difference between the requested effort for a role and the summarized effort of the already assigned employees with the same role and qualification. This serves as support during the controlling of the required assignations of employees. A egative value, for instance, indicates that more employees with this role and qualification are required.

Balance Machinery - contains the dynamically calculated difference between the requested effort for a machine types and the summarized effort of the already assigned machinery with the same machine types. This serves as support during the controlling of the required assignations of machineries. A egative value, for instance, indicates that more machinery with this machine types are required

Sample of calculation for partially assigned resources.

The activity A are assigned to two roles, programmer C++ and designer, each 8 people hours. Thus, the effort at the role level is calculated as follows 8 + 8 = 16 people hours. In the next step, the employee Mr Tidy is assigned to this activity A as a programmer C++, he takes over the programmer C++ effort in the amount of 8 persons hours. The role of designer, however, remains without cover by a concrete employee. As a result, the total effort at the employee level is estimated to be only 8 people hours. Although the role designer at the resource view roles is listed but without effort.



4.5.7 Project overview

Click on Start > Properties > Info to display failed resources.



Select the tab Project overview

roperties			
Selected portfolio:		Relo	ad Remove
Late activities Overallocated resources Failed resources	Unassigned resources Project overview Portfolio dashboard External documents		
Activities	Ongoing and yet-to-begin activities		
Completed: 0 Complete: 0 %	Nr. Name	Duration	Difference
Started: 0 Reserve: 0 day	1.1 software development planning	2.25	-14
Still not started: 25			
All: 25			

You see all the general information about the Project in the appearing window.

4.5.8 Portfolio dashboard

The portfolio overview shows projects that have been last opened in the portfolio.

Um sich Portfolio dashboard anzeigen zu lassen, klicken Sie bitte Start > Eigenschaften > Info



Select the tab Project dashboard

Selected portfolio: 2016 portfolio					Rel	oad Remove
Late activities Overallocated resources Failed resources Unassigned resources	Project overview	v Portfolio dashboa	ard External (documents		
Name	Completed C	ode Category	Priority	Status	Start 💌	Finish
☑ software development process	0		100		23.11.15 08:00	25.01.16 12:00
Project 1	38		100		26.01.16 00:00	16.02.16 00:00
new_software development process	0		100		27.01.16 00:00	29.03.16 14:00
Project2	0		100		09.03.16 14:00	29.03.16 14:00
2016_2_soft	0		100		28.03.16 00:00	05.06.16 00:00
Dimocess ABC	0		100		07.11.16 08:00	11.01.17 14:00

You can use the button to select a portfolio.

The portfolio's projects marked with a check mark are considered in the calculation of the resources availability.

4.5.9 Cross-project links

Cross-project links are only available in Rillsoft Project with Rillsoft Integration Server (RIS).

To display cross-project links, please click Start > Properties > Info.



Select the Cross-project Links tab.

Note: The tab Cross-Project Links is only visible with the database-based solution Rillsoft Project with RIS.

roperties				/	
•				<u>i</u>	
Late activities Overallocated resources Faile	ed resources Unassigned resources	Partially assigned resources	Portfolio dashboard	Cross-project links	
Perdecessor project/activity	Successor project/activity	Start 👻	Finish	Reserve	Delay
Building planning/1.1.5.5 Briefing at start of construction	Origon planning/1.2.1.1 Cost estimate	03.11.16 17:00	27.10.16 08:00	0	-7.38
Origon planning/1.2.5.5 Briefing at start of construction	Katomo planning/1.3.1.2 Project procedure	19.12.16 17:00	30.11.16 08:00	-8	-19.38

All cross-project links in the portfolio/collective project are listed here.

- The column **Predecessor project/activity** shows the activities from which a link originates.
- The Successor project/activity column shows the activities that are at the end of the link.
- The columns Start and Finish allow you to follow a beginning and an end of a link.
- **Reserve** informs you whether there is a time gap in absolute time between the initial position and the input position.
- Delay represents a value of the time gap released from the beginning.
- •

4.5.10 External documents

To display external documents, please click Start > Properties > Info.



Select the External Documents tab.

Note: The **External Documents tab is only visible with the file-based solution Rillsoft Project.

roper	ties							
B Sele	cted portfolio	:						Reload Remove
Late a	ctivities	Overallocated resources	Failed resources	Unassigned resources	Partially assigned resources	Project overview	Portfolio dashboard	External documents
Nr.	Name					External link		
1	Phase 1							
						file://D:\01%20RP\Sample	es_en\emp_week.xls	
3	Phase 2							
						file://D:\01%20RP\EN_Sa	mples\2016_holiday_pdf.p	df

All references in the project/sub-project are listed here.

- The names of the tasks or sub-projects are shown in the Name column. are shown.
- Double-clicking on the Name takes you to the Notes tab in the task properties.
- The names of the linked files are shown in the **External Link** column. are displayed. If you double-click on the link, this file is opened.

4.6 Create activities

4.6.1 Create activities

In order to create a new activity, do as follows:

1. click on the menu **Start > Activity**.

R 🖬	ا ک ا	-		GANT	IT CHART									Pr	roject3													- 🗆 ×
FILE	START	PRO.	ECT	FO	RMAT																1			_	_		_	^
	Cantt	ork diagra -network i	m hart	() 98	lime Effort			♣ Emp ★ Mac	loyee hine		лћ 1 Х т			81:	Proje Reso	rce urce	0× 2	25× 50×	75× 100×	T Su	tivity 👻	F •		11 × 	T		γ Ci I Ci	utoff date
Gantt chart	Can Curre			-	Cost	Employ	ee 🚮 🔻	all mus			-			0	Info		-	X X	•	්න Lin	nk 🔹	S	tructure		A		T Pr	oject start 🔹
	Activity	views		Variance	e analysis	Resour	ce views	Capacity	views	Add	itional	view	Jser views	P	ropert	es		Sched	ule	1	Insert		Outline	2	Ec	dit	S	crolling
		С	utoff da	ate: 07.09	.17 00:00			<<	06	07 0	8 09	10 1	1 12 13	Se	ptembe 15	r 2017 16 17	7 18	19 2	0 21 2	26	27 2	8 29	Activity					
Nr.	Name		Effort	Dur	Start		Finish		W	T F	S	S N	T W	т	F	s s	M	TV	V T F	- D	MC) F	Create a activity ta	new a able.	ctivity	as soo	n as po	ssible at the end
1			3	7.63	07.09.17	08:00	18.09.17	7 14:00		-													Alternati	velv. vo	ou can	n create	e a new	activity in any pla
1.1	1 task 1		1	3	07.09.17	08:00	11.09.17	17:00					task 1			_					, F	Ξ,	setting a draw a b	curso	r on a	prefer	red area 1 left mo	a in the Gantt cha
1.2	2 task 2		1	3	12.09.17	08:00	14.09.17	7 17:00					4		task	2		tack 2										
1.3	3 task 3		1	3.63	13.09.17	08:00	18.09.17	7 14:00						tas	k 4			lask J				:						
2	task 4		1	3.5	08.09.17	13:00	13.09.17	7 17:00						uo	"				<i>"</i>									
3	projec	aenq	0	0	20.09.17	09.00	20.09.17	09.00										- Con	<i>h</i>									
4																												▼ T
		_															_		_							_		r
	3	Name:														Coo	de:		Fixed: D	uration	-	ffort:	0	PT I	Duratio	n:	0 AT	(8 Hrs.)
Gen	ieral	Roles	Employ	yee	Timeshee	ets	Material	Mach	ine typ	e	Mach	inery	Links		Format		User fie	elds	Notes									
Due	date				Activity cale	endar:					Con	noleted:	0	%	Col	or:				*								ОК
	Di	ate	Time		Project cal	lendar		Ŧ			Fixed	l costs:	0	£														Cancel
	Start: 2	0.09.1/ *	09:00		Disregar	d team ar	nd employe	e calenda	r	Fina	ncing																	
	Finish: 2	0.09.17 -	09:00		-					In	voice a	mount:	0	C														
	Fix				Start of a	activity or	nly at first sl	hift		Te	m of pa	iyment:	0	wor														
	Mark as mile	estone			Merge in	nto one lin	e				R	eceipt:		¥														
RESOU	RCE POOL:	http://loc	alhost/i	ris6/21																		E		DAY 1	:1 -			

1. Enter an activity name in the appropriate row.

In order to create a new activity in any position, do as follows:

Alternative 1: Set the cursor on the position you want in the Gantt chart and pressing the mouse button draw a bar. This way the start date and finish date as well as activity duration will be defined at the same time.

Alternative 2: You can create an activity via the diagram field of the context menu.

In order to create a new activity in any position, do as follows:

- Rightclick on the space in the Gantt chart where you want to create a new activity. It can also be between other activities.
- Choose the item **New activity** in the context menu .

R 🛛 📁	ا ا	ء 🗆 خ		GAN	TT CHART										F	Project	3																		-		×
FILE	STA	RT PRC	JECT	FO	RMAT																																^
10000	°: Net	work diagra	am	٩	Time	1002	82	🏭 Emp	loyee		ah	•		*		🗈 Proj	ect					-	- 24	Acti	ivity 🖣				+9	-	T		1	Y Cu	toff d	ate	\square
	Gar	ntt-network	chart	22	Effort			* Mac	hine		×	•		I	2	Reso	ouro	e	: 25	× 50	× 75	× 100×	1-	Sub ר	proje	ect 🝷		LE	-3	•	×			Cu	rrent	date	
chart					Cost	Employ	/ee 📑				Ξ			-	e) Info		->	1			×	ta	o Link	k 🕶		Str	τuαtu	re r	1 ×	an,		•	Pro	ject s	tart 🝷	,
	Activit	ty views		Varianc	e analysis	Resour	rce views	Capacity	view	s Ad	ditiona	l view	Use	er views		Proper	ties			Sche	dule			In	sert			Out	line		E	dit		So	rollin	g	
		(Cutoff d	ate: 07.09	9.17 00:00			<<	06	07 (19 00	10	11	12 13	S	eptemt	16	017	10	10	20	24 2	2 22	24	25	26	27	20	20	20	01	0.2 0	12 0	4 0	- 06	07	-
Nr.	Nam	ie	Effor	t Dur	Start		Finish		W	T	F S	S	M	TW	Т	• 13 • F	S	S	M	T	w	T F	s 2	S	M	7	W	20 T	2.5 F	S	s	M .	T 1	N T	F	S	÷
I			:	3 7.63	07.09.17	7 08:00	18.09.1	7 14:00		-			-	_		-			٦.																		
1.	1 task	:1		1 3	07.09.17	7 08:00	11.09.1	7 17:00					-	task 1																							
1.	2 task	2		1 3	12.09.17	7 08:00	14.09.1	7 17:00					4			tasl	K 2																				
1.	3 task	3		1 3.63	13.09.17	7 08:00	18.09.1	7 14:00									1		t ta	ask :	3																-
2	task	: 4		1 3.5	08.09.17	7 13:00	13.09.1	7 17:00							ta	sk 4																					
3	proj	ect end	(0 0	20.09.17	7 09:00	20.09.1	7 09:00							_					-	pr	oject	end														
*																										4											
															ß	Paste								Str	g+V												
																Select	all							Str	g+A												
																New a	activi	ty																			
																New a	activi	ty from	tem	nplate	e file																
•														1		New a	activi	ty from	inte	egrat	ion s	erver t	empl	ate												•	
•		-1	-t []													New s	ubp	roject								F						D		_			
•	3	elected portr	0110:1													New s	ubp	roject f	rom	temp	olate	file				-			He	DEOIS		Ken	nove				
Lat	e activitie:	s Over	allocate	ed resourc	es F	ailed reso	urces	Unassig	ned re	source	es	Proje	ct ov	erview		New s	ubp	roject f	rom	inte	grati	on ser	/er te	mplat	te									-			
Con	flict	Nr.	Nan	ne														Eff	fort	Ne	gativ	effort	0	Juratio	n St	tart		~	Fini	ish		Balan	се				
																																	_				
																																	_				
		1																	_										1								
RESOU	RCE POC	DL: http://lo	calhost	/ris6/21																							E			DAY 1	:1			-1-		- +	

4.6.2 Edit activities

In order to edit any parameter of an existing activity, do as follows:

- In the diagram click on the activity whose parameter you want to edit.
- Activate the required tab in the window Properties and make the changes.

Prope	erties												
	1.1	Name:	task 1				Code:	Fixed:	Duration	✓ Effort:	32 Ph	Duration:	4 AT (8 Hrs.)
Gen	eral	Roles	Employee	Timesheets	Material	Machine type	Machinery	Links	Format	User fields	Notes		
Due	date —	Date	Time	Activity calendar:		-	Completed:	0 %	Color:				ок
	Start:	26.01.16	· 08:00				Fixed costs:	0€					Cancel
0	Finish:	29.01.16	• 17:00	Disregard tean	n and employee	calendar	Invoice amount:	0€					
	Fix			Start of activity	y only at first shi	ft	Term of payment:	0 wo	ori				
	Mark as	milestone		Merge into one	e line		Receipt:	· *					

• Click on the button **OK**.

Edit in the Activity table

You may make the changes to the most important activity parameter directly in the table of the Gantt chart.

R 🛛 🧀	🗄 🕤 🗟 🗔 🗄		GANT	T CHART									
FILE	START PRO	JECT	FO	RMAT									
Gantt chart	Gantt-network	im chart	C 1 25 F 25 C	lime Effort Cost e analysis	Employ	/ee	tana Cana	Emp Mac	hine		ddit	ili ` × •	I view
	c	utoff da	ite: 07.09	.17 00:00				<<	06	07	08	09	10
Nr.	Name	Effort	Dur	Start		Finish			W	Т	F	S	S
⊡ 1		48	7.63	07.09.17	08:00	18.09.17	7 14:0	00		-			
1.	1 task 1	32	4	07.09.17	7 08:00	12.09.17	7 17:0	00		944 9			
1.3	2 task 2	8	73	13.09.17	08:00	15.09.17	7 17:0	00					
1.3	3 task 3	8	3.63	13.09.17	08:00	18.09.17	7 14:0	00					
2	task 4	8	3.5	08.09.17	7 13:00	13.09.1	7 17:0	00				:	
3	project end	0	0	20.09.17	7 09:00	20.09.1	7 09:0	00					
*													

Edit in the Gantt chart area

You may use the mouse to shift the activity in the diagram, so as to change its time parameters or duration.

Re 🧉	5	¢ 🗉	- -	G	SANTT (HART											Pr	oject	1																				-		×
FILE	STAF	T P	ROJECT		FORM	IAT																																			^
Gantt	🐮 Vari 🙄 Nete	ance ana vork dia tt-netwo	alysis gram ork chart	Emp	ployee	💽 Rol 💽 Tea Other	e 🏭 m 🐮	Employee Machine	.⊪ Reso 火 Cost ∵ Gan	t cha tt cha	e cha rt ∙ art	rt •	* 10 1	Save Man Shov	age	Pro	ject	Reso	urce		0× 2	5× 5	50×	75×	00×	ta †	Act Sul Lin	ivity bproj k 🔻	ject •	SI	truct	ure	*3 • -3 • -3 •		r 5	* *	Ţ	Cuto Curr Proj	off da ent c ect st	te ate art 🔻	
	Activit	views		R	esouro	e views	Cap	acity views	Addit	iona	l viev	N	Us	er vie	WS		Prop	ertie	s			Sch	edul	e			In	nsert			0	utline	e		Edi	t		Scro	olling		
			Cutoff o	ate:	26.01.1	16 00:00			<<	1															٠					Febr	ruary	2016	5								_ ^
Nr	Name		Eff	ort .	Dur	Start		Finish		25	26 T	27	28 T	29	30	31	01 0	02 (T	03	04 T	05	06 c	07	08 M	09 T	10	11	12	13	14	15	16 T	17	18	19	20	21	22	23	24	25
E 1	suboro	iect 1	1	14	10	26.01	16.08.00	08.02.1	6 17:00	-		**		•	3	3	m		~~	•	-	3	3	m	sub	proj	ect '	1	3	3	m			-		3	3	m	-	~~	-
1	1 task 1	JUCE		32	4	26.01	16 08:00	29.01.1	6 17:00		-			_	task	1																									
1.	2 task 2			40	5	01.02	16 08:00	05.02.1	6 17:00													task	2																		
1.	3 task 3			32	4	03.02	16 08:00	08.02.1	6 17:00																tasł	(3															
2	task 4		:	32	4	28.01	16 08:00	02.02.1	6 17:00										ack	4			-																		-
3	project	end		0	0	09.02	16 09:00	09.02.1	6 09:00									1	- ,) tack	· A																				
*																	-		5	start:								28.0	1.16	08:00											
																			F	inish	n:							04.0	2.16	17:00											
																			-								7	F			Γ										

Edit schedule

You can quickly check the completion percentage if you select the menu item **Start > Schedule**.



4.6.3 Delete activities

In order to delete an existing activity, do as follows:

- Rightclick on the activity you want to delete.
- Choose the menu item **Start > Edit > Delete**.



Alternatively: You can quickly delete an existing activity by clicking on the blank space in the diagram with the right mouse button pressed down and striking out the activity.



4.7 Working with activity and subproject tables

The Activity and Subproject tables display the most important parameters. You can adjust the tables to you requirements doing the following:

1. click on the menu Format > Columns



Alternative

1. rightclick on the column names of the table and choose Properties in the context menu.

RE	1	🗄 🕈 👌 🗆	÷	GANT	T CHART														P	rojec	ct4																							-		×
FIL	E	START	ROJECT	FO	RMAT																																									^
100		📷 Network dia	igram	•	lime		Role	ė.	Em	ployee	ab	Reso	urce	chart •	1	Sav	e		Pro	ject							te A	ctivit	y -				+∃ s	how	r deta	il -		Fil	ter			T	Cut	off da	ate	
		🔢 Gantt-netw	ork chart	28	Effort	Emplo	📕 🔝 Team	*	Ma	ichine	ø	Cost	char	t -	I	Ma	nage	8	Re	ouro	ce	02 3	25% 3		°5× 10		†— s	ubpr	oject	-	LE		Эн	lide	detai	•		× CI	ear fil	ters -	- W		Cur	rent o	late	
cha	rt				Cost	Emplo	Other 🔻				1	Gant	t cha	irt		Sho	w *	6	Inf	0		⇒I		1.15	~		້ວຍເ	ink 🔻			- T	ure	ı ا	n sul	oproj	ect *	ð	🖞 Se	arch			T	Pro	ect st	art 🝷	
		Activity views		Variance	e analysis	Re	source views	Ca	pacif	ty views		Additi	onal	view	U	ser vi	ews	F	rope	rties			Sch	edul	e			Inse	t				Out	line					Ed	it			Scr	olling	1	
			Cutoff d	late: 07.09	.17 00:00		P								Se	ptemb	er 20	017					•					•																Oct	ober	20 🔺
Ne		Mama	Effort	Durat	Chart		Einish		06 	07 08	09	10	11	12 13	14	15	16	17	18	19	20 2	21 2	22 2	23 2	4 2	5 2	5 27	28	29	30	01	02	03	04	05	06	07	08	09	10 1	11 13	2 13	3 14	15	16	÷.
INI.		ivanie	24	Durat	07.00.47		Column arran	ieme	nt		Ê	5	м	I W		r	5	5	m		subpr	roiec	11	5	5 1		W	Ľ	r	5	5	M	-	vv	-		5	5	м		<u></u>		5	5	м	÷
	4.4	took 1	24	9	07.09.17	00.00	11 00 17 17:0	, 0		_	J		_ t	ask 1						•																										
	1.1	task i	24	2.05	42.00.47	00.00	10.09.17 17.0												- ta	sk 2	,																									
	1.2	task 2	20	3.25	13.09.17	08.00	18.09.17 10.0	0										· · · · · ·		_	task 1	3																								
	1.3	task 3	24	3	15.09.17	08:00	19.09.17 17:0	0								•					uon .																									
5		task 4	64	8	11.09.17	08:00	20.09.17 17:0	0														158.4	•																							
6		project end	0	0	22.09.17	14:00	22.09.17 14:0	0													L	+	± pr	rojec	tend																					
*																																														

1. In the appearing window you can edit the column layout and choose which of the columns (also user-defined fields) you want to have on display.

lame	Unit	Description	Up
Nr.		Nr.	
Info		Info	Down
Waming		Waming	
Name		Name	Reset
Code		Code	
		Universally unique identifier	
		Category	01/
Priority		Priority	OK
Statue		Statue	
Deliverable		Deliverable	Cancel
Completed deliverable		Completed deliverable	
Onen deliverable			
Child of medadic	Pm	Chandrand	
Effort	PT	Effort	
Completed	PT	Elloit Completed affect	
_ Open		Upen errort	
	P1	Negative enort	
	AT	Duration	
	AT		
Open duration	AI	Open duration	
∠ Start		Start (date + time)	
Start		Start (date)	
Start		Start (calendar week)	
∠ Finish		Finish (date + time)	
Finish		Finish (date)	
Finish		Finish (calendar week))	
Earliest start		Earliest start	
Start reserve	day	Start reserve	
Latest finish		Latest finish	
Finish reserve	day	Finish reserve	
Fixed costs	€	Fixed costs	
HR cost	€	Human resource cost	
Material costs	€	Material costs	
Machinery costs	€	Machinery costs	
Costs	€	Costs	
Completed	%	Completed	
Invoice amount	€	Invoice amount	
Term of payment		Term of payment	
Receipt of payment		Receipt of payment	
Predecessor		Predecessor - activities	
Successor		Successor - activities	
Roles		Roles	
Teams		Teams	
Employee		Employee	
Material		Material	
Machine types		Machine types	
Machinery		Machinery	
Balance	PT	Balance	
		balanco	

Change the width of the table

- change the width of a column and so affect the overall width of the table.
- temporarily collapse and unfold a table via the button.

Navigation

• You can use the arrow buttons **upwards** and **downwards** to toggle between activities and subprojects. You can use the buttons **Tab** and **Shift+Tab** to jump forwards and backwards among the single columns.

Unit of measurement

is in **Project / Project Properties / General / Project Settings** by specifying the duration and effort for tasks in hours or define in working days, weeks, etc.

Fields in the table

No.	Number of WBS code
Info	Signals whether it has been referred to internal documents or external links from an activity / subproject
Warning	Alert about overallocated, failed resources, or late activities
Name	Name of activity or subproject
Code	Code of activity or subproject
Category	Project category
Priority	Project priority
Status	Project status
Quantity	Quantity of the working results, measured by the measurement unit defined for the activity
Completed	Completed quantity
Open	Open quantity
Measurement unit	Measurement unit for the activity's working result (such as: m3, freight,).
Norm	Norm in man-hours required for the completion of a measurement unit within an activity
Effort	Effort of the activity or subproject
Completed	Completed effort
Open	Open effort
Duration	Duration of the activity or subproject
Completed	Completed duration
Open	Open duration
Start	Start time (date and time of day) of the activity or subproject
Start	Start time (date) of the activity or subproject
Finish	Finish time (date and time of day) of the activity or subproject
Finish	Finish time (date) of the activity or subproject
Earliest possible start	Earliest possible start of activity Caution! Will only be shown if the option Calculation of contingency
Start, reserve	Contingency reserve (difference between start and earliest possible start). Caution! Will only be shown if
Latest possible finish	Latest possible finish of activity Caution! Will only be shown if the option Calculation of contingency
Finish, reserve	Contingency reserve (difference between latest possible finish and finish). Caution! Will only be shown i
Fixed costs	Separate costs of the activity or subproject that are not shown by the view of resources
HR costs	Costs for the activity or subproject's personnel resources
Material costs	Material costs for the activity or subproject
Machine costs	Machine costs for the activity or subproject
Costs	Total costs for the activity or subproject
Completed	Percentage of completion of the activity / percentage of progress
Amount of invoice	Amount for the invoicing period of the project
Payment period	Period of time in working days for the due date of the payment
Receipt of payment	Date of payment receipt
Predecessor	"From" activities
Successor	"To" activities
Roles	Assigned roles
Teams	Assigned teams
Employees	Assigned employees
Material	Allocated materials
Machine types	Allocated machine types
Machinery	Allocated machinery
Balance	Difference between the demand for assigned roles and the demand for assigned employees (for a quick or
User-defined fields 1 - 20	Difference between the demand for assigned roles and the demand for assigned employees (10) a quick of
User-uenneu neius 1 - 20	

4.8 Link activities

4.8.1 Link activities

Activities can be linked with each other in Gantt chart, network charts and Gantt-network charts.

The following link types are at your disposal:

Finish-Start	the "from" activity must finish before the "to" activity can start
Start-Start	the "from" activity must start before the "to" activity can start
Finish-Finish	the "from" activity must finish before the "to" activity can finish
Start-Finish	the "from" activity must start before the "to" activity can finish
Incompatible activity group	Activities that must not be executed at the same time (time conflicts)

You can unhide the Properties window of any link by doubleclicking on the link.

Properties		
3		
Link		
Predecessor	2task 4	OK
Successor	3 project end	Cancel
Link type	Finish to start 👻	
Delay	Absolute time - 2 day	Delete
Color	Activity color 👻 🗵 Bold highlighted	

Time intervals

Intervals can be defined in Project properties in relation to the time unit of the duration (such as hours or days). You can choose among the following types of intervals:

- in absolute time (1 day consists of 24 hours, that is, for example, 8 hours and 16 non-working hours)
- in calendar time (depending on the actual calendar, for example, 1 day consists of 8 hours, that is, it ignores non-working hours)
- in relative time (for instance, a particular percentage, relating to the "to" activity, such as: 50%)

Intervals can have

- positive (such as: + 2 hours) or
- negative (such as: -50% = overlapping)

signs.

Highlight link

Links can be highlighted by means of colour or boldface.

Create link

In order to create a new link, do as follows:

• Choose the link type via the menu **Start > Insert > Link**.

🖅 Activity 🔻
ta Subproject 🔹
້ອ Link 🝷 🚤
Insert

- Connect two activities by drawing your mouse from one activity to another.
- Choose the interval type for the link in the Properties window.
- If necessary, enter the Delay (positive or negative) by which you want to delay the "to" activity depending on the selected type of link.
- Click on the button **OK**.



Alternatively: You can create link activities in the diagrams via the context menu.

R Select Fi	inish	Activity		X
Search for:	[
Nr.	-	Name	Start	Finish
1.1		task 1	26.01.16 08:00	29.01.16 17:00
1.2		task 2	01.02.16 08:00	05.02.16 17:00
1.3		task 3	03.02.16 08:00	08.02.16 17:00
2		task 4	28.01.16 08:00	09.02.16 09:00
3		project end	11.02.16 09:00	11.02.16 09:00
		ОК	Cancel	

Context menu:

If you want to move a chain of activities backwards or also forwards with respect to a specific activity, two following commands are available from the context menu:

- Previous activity customize the latest start time
- Successor activity customize the earliest start time

፠	Cut	Umschalt+Entf	
Ē	Сору	Strg+C	
ř	Move in subproject		
ç	Move from subproject		
	Previous activity customize the lates	t start time	
	Successor activity customize the earl	iest start time	
	Completed		
	Split		
	Remove from incompatible group		
	Incoming link delete		Þ
	Outbound link delete		

Notes (restrictions in the links creation):

• The occurrence of an activity is only allowed in incompatible activity groups.

4.8.2 Edit link

Links can only be edited as long as the succeeding activity has not yet started.

In order to change an existing link, do as follows:

- Mark the link you want to edit by clicking on the line connecting the two activities.
- From the drop down menu Link type select another link type in the properties window.
- If necessary, enter the Delay (positive or negative) by which you want to delay the succeeding activity depending on the selected activity type.
- Click on the button **OK**.

Alternatively: You can change the Link type via the context menu of the connecting line.

4.8.3 Delete link

You can quickly delete an existing link by clicking on the blank space in the diagram with the right mouse button pressed down and strike out the link.



Alternatively: In order to delete an existing link, do as follows:

- Rightclick on the activity.
- From the context menu, choose the command Incoming link delete / Outbound link delete.
- Choose the link you want to delete.

	7						1										٠			Febr	uary	2016	6						
5	26	27	28	29	30	31	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
A	т	W	Т	F	S	S	М	Т	W	т	F	S	S	М	Т	W	Т	F	S	S	Μ	Т	W	Т	F	S	S	М	Т
	-														sub	proje	ect 1												
					task	(1																							
							,,,,,,				uu,	tasl	(2																
							'	፠	Cut	ut Umschalt+Enti										tf									
								Ē	Сор	у								5	Strg+	c									
										evious activity customize the latest start time																			
									Prev	evious activity customize the latest start time																			
									Suc	cesso	or ad	tivity	cust	omiz	e the	earli	est s	tart t	ime										
									Abo	iesch	loss	en								-									
									Coli	+																			
									Shu																				
									Rem	iove	from	inco	mpa	tible	grou	ıp													
									Inco	min	g linl	k del	ete							- •									
									Out	bou	nd lii	nk de	elete							•		All o	lelet	e	-	-	-	-	
										_												Fini	sh to	star	t in 3	proi	ect e	nd	
																						1				proj			

4.9 Activities properties

4.9.1 Enter activity properties

In order to define the properties of an activity, do as follows:

• Mark the activity whose properties you want to enter. The window Object properties opens.

Properties											
1.1	Name:	task 1			Code:	Fixed:	Duration	✓ Effort:	32 Ph	Duration:	4 AT (8 Hrs.)
General	Roles	Employee	Timesheets Material	Machine type	Machinery	Links	Format	User fields	Notes		
Due date	-	_	Activity calendar:		Completed:	0 %	Color:				ОК
	Date	Time	Project calendar	·							
Start:	26.01.16	· 08:00	Disregard team and employee ca	elendar Finar	Fixed costs:	0€					Cancel
⊖ Finish:	29.01.16	• 17:00		In	voice amount:	0€					
□ Fix			Start of activity only at first shift	Te	m of payment:	0 wor					
🗌 Mark as	milestone		Merge into one line		Receipt:	*					

- 1. Enter the activity name in the field Name.
- 2. Enter the activity code in the field **Code**.

The following three fields will be available only if you have marked the check box **Enter deliverable for activity** in the menu item **Start > Properties > Project** in Project properties.

Name:	software developme	nt process		Code:	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color	User fields Notes	
Due date	Date Time 07.09.17 ~ 00:00 08.11.17 ~ 14:00	Project calendar: 1 Standard 40-hour work we v Category: Priority: - Not selected - v 100 Status: - Not selected - v	Project settings Time step: 1 hour Uuration: in workdays(dependent on project c Effort: in hours	Planning type	OK Cancel

- 3. If necessary, enter the labour quantity as measured in the predefined measurement unit.
- 4. If necessary, enter the measurement unit of the labour amount (such as m3, load,...).
- 5. If necessary, enter the norm in man-hours required for the completion of a measurement unit.

The following three fields will only be available, if you have marked the check box **Enter effort for activity** in the menu item **Start > Properties > Project** in Project properties.

roperties	software developmen	nt process		Code	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color	User fields Notes	
Due date	Date Time 07.09.17 × 00:00 08.11.17 × 14:00	Project calendar: 1 Standard 40-hour work we * Category: Priority: - Not selected - * 100 Status: - Not selected -	Project settings Time step: 1 hour Duration: in workdays(dependent on project c * Effort: in hours	Planning type	OK Cancel
Cutoff date:	07.09.17 × 00:00	Baseline:	Enter deliverable for activity(Example: 150 M [•])	Use for subordinated subprojects and activities	

- 6. **Fixed duration** Choose this option to calculate the effort for the activity and the resource utilization, with the duration of the activity remaining unchanged, if possible. You should choose this option if you do the scheduling on the basis of the known activity duration. The labour effort of the resources would then be automatically calculated.
- 7. **Fixed effort** Choose this option to calculate the activity duration and the resource utilization, with the effort remaining unchanged. You should choose this option if you do the scheduling on the basis of the known activity efforts for activity roles. The activity duration would then be automatically calculated.
- 8. Fixed effort & duration Choose this option to calculate the quantity and resource utilization on the basis of the constant effort and constant duration. This option allows you to calculate the quantity and utilization of the required personnel resources.

Note: This option is only suitable for role assignation.

- 9. Enter the activity effort in the field **Effort**.
- 10. Enter the activity duration in the field **Duration**.
- 11. Click on the button **OK**.

4.9.2 Define general activity properties

In order to define the general properties of an activity, do as follows:

• Activate the tab General in the window Activity properties.

Pro	perties	5											
	1.1	Name:	task 1				Code:	Fixed:	Duration	✓ Effort:	32 Ph	Duration:	4 AT (8 Hrs.)
[General	Roles	Employee	Timesheets	Material	Machine type	Machinery	Links	Format	User fields	Notes		
ſ	Due date —	Date	Time	Activity calendar: Project calendar		•	Completed:	0 % 0 €	Color:			,	OK Cancel
	Start: Finish:	29.01.16	08:0017:00	Disregard tean	n and employee	e calendar 🔗 F	Financing Invoice amount:	0 €					
	Fix			Start of activity	y only at first sh	ft	Term of payment:	0 wo	d				
	🗌 Mark as	milestone		Merge into one	e line		Receipt:	··					

Field Due date

- Choose the option **Start** if you have a fixed start date of the activity and enter **Date** and **Time**. The finish date of the activity will be calculated automatically.
- Choose the option **Finish** if you have a fixed finish date of the activity and enter **Date** and **Time**. The start date of the activity will be calculated automatically. **Note:** You can move the start date and finish date of an activity much more quickly in the diagram by using the mouse to shift the activity.
- Mark the check box **Fix** if the activity due dates in the optional date calculations that have been selected via the menu must not be shifted.
- Mark the check box **Mark as milestone** if you want to label the activity as milestone. In this case, activity duration is set to zero. Field **Activity calendar**
- Select the calendar you want to use from the drop down list Activity calendar.

The button allows for the quick access to the actual calendar.

- Mark the check box **Disregard team calendar and employee calendar** if the team calendar and employee calendar should not be regarded in new activities.
- Mark the check box **Start of activity only at first shift** if the start of activity is permitted to begin only at the first shift.
- Mark the check box **Merge into one line** if you want to have several activities succeeding in a row displayed hierarchically independent.
- Enter the percentage of completion of an activity in the field Completed.
- Enter extra costs that are not on display along with the resources in the field **Fixed costs**.

Field Financing

- Enter the amount of the payment period in the field Invoice amount.
- Define a period of time in business days for the due date of the payment in the field Term of payment.
- You can enter the date of the payment receipt in the field **Receipt of payment** only if you have declared the milestone to be 100% completed. Once you have marked the milestone as 100% completed, the payment receipt is displayed automatically along with the due date of the milestone plus the term of payment. You may also correct the date.
- Select the color you want to use from the drop down list Color

• Click on the button **OK**.

4.9.3 Assign roles

In order to assign roles to the selected activity, do as follows:

• Activate the tab Roles in the window Activity properties.

operties														
1.1	Name: task 1					Code:	Fixed:	Duration	- E	ffort:	32 Ph	Duration	1: 4 AT	(8 Hrs.)
General 🗸	Roles Employee	Timesheets	Mater	ial	Machine type	Machinery	Links	Format	User	fields	Notes			
Filter:			•	8	Assigned roles:					R	lesource p	ool		ОК
Role	Qualification		Costs		Role	Qualification			Quantity	Utilizat	Effort	Notes		Cance
programmer	C++		50.00		programmer	PHP			1	100	32			
programmer	PHP		45.00											
programmer	V.Basic		50.00											
writter			30.00											
manager			60.00	-										

Available roles

- Enter a string value in the field **Filter** to show only certain roles (search via role group and code) or enter two dots ".." in order to view the roles that have already been used in the project.
- Doubleclick on the entry in the left table to assign the role to the activity. Assigned roles
- Enter a differing value for the number of employees required for this role in the field Quantity.
- Enter a differing value of the percentage the role is utilized in the activity in the field Utilization.
- Enter a differing value in the field Effort, for the effort that a role has to perform within the activity.
- Enter notes that might be crucial for the role in connection with the activity in the field Notes.
- Click on the button **OK**.

Notes:

• You can adjust the columns layout of both tables at your convenience by rightclicking on the column names of the table and selecting the columns you want to adjust.

roperties												
1.1	Name: task 1			Code:	F	ixed: Duration	• E	ffort:	32 Ph	Duratio	n:	4 AT (8 Hrs.)
General 🗸	Roles Employee Timesheet	s Material	Machine type	Machinery	Lin	ks Format	User	fields	Notes			
Filter:		• 8	Assigned roles:			Nr. Role		R	esource p	ool		ок
Role	Qualification	Costs 🔺	Role	Qualification		Code		Utilizat	Effort	Notes		Cancel
programmer	C++	50.00	programmer	PHP	\checkmark	Qualification		100	32			
programmer	PHP	45.00			\checkmark	Quantity						
programmer	V.Basic	50.00			$\overline{\checkmark}$	Utilization						
writter		30.00				Effort						
manager		60 00			\checkmark	Notes						

- You can use the menu item Project / Roles from Employee assignation to define roles within a project for available employees who are required for the activity completion. This allows you to use easily these settings as templates for other activities.
- In order to have quick access to the used resources, click on the button **Resource pool** if you are using the general resource pool or on the button **Project resources** if you are using a project-specific resource pool.

operties													
1.1	Name: task 1					Code:	Fixed:	Duration		ffort:	32 Ph	Duration	n: 4 AT (8 Hrs.)
General 🗸	Roles Employee	Timesheets	Mater	ial	Machine type	Machinery	Links	Format	User	fields	Notes		
Filter:			·	8	Assigned roles:					R	esource p	ool	ОК
Role	Qualification		Costs		Role	Qualification		-	Quantity	Utilizat	Effort	Notes	Cancel
programmer	C++		50.00		programmer	PHP			1	100	32		
programmer	PHP		45.00										
programmer	V.Basic		50.00										
writter			30.00										
manager			60.00	\mathbf{T}									

4.9.4 Assign employees

In order to assign employees to the selected activities, do as follows:

• Activate the tab **Employees** in the window Activity properties.

operties																					
1.4 Name:	software instal	lation planning								Code:		Fixed	Dura	tion	-	Effort:	72	Ph Dur	ation:	4.5 AT ((8 Hrs.)
General 🗸 Roles	Employee	Timesheets N	Material	Machine type Ma	achinery	Link	s	Format	Us	er field:	s Not	es									
Preferred teams		Filter:				•	5	Assigned	employ	ees:							Res	ource pool] L	OK
Role - qualification	Bal	Name	On-call	Availa Role - qualif	Pr	Costs		Name	0	A	Role - q	Pr	Util	Ad	Α	Effort	Neg	Substitutio	. N	1 [Cance
∠ programmer - C++	-36	Tidy, John	0	100 programmer	100	40.00															
analyst	-36	Sleeper	100	100 programmer	100	50.00															
		Eager	78	100 programmer	100	50.00														-	
		Slow	100	100 programmer	100	50.00														-	
		Fast	100	100 programmer	100	50.00														-	

Assigned roles

- Mark the check box of a role in the list Assigned roles in order to use this role as additional filter for the employees list. The list of employees shows you only those employees who have the appropriate roles and qualifications.
- The column Quantity-workload-effort contains the required number of employees whose workload and effort meet the demands of the role. This column is deactivated by default. If you want to unhide it, please refer to Details.
- The field Balance contains the dynamically calculated difference between the requested effort for a role and the summarized effort of the already assigned employees with the same role and qualification. This serves as support during the controlling of the required assignations of employees. A negative value, for instance, indicates that more employees with this role and qualification are required.

Preferred teams

• Mark the check box Preferred and assigned teams to use the assigned teams as an additional filter for the employees list. The list of employees will show you then only those employees that belong to assigned teams.

Available employees - The table in the centre lists, depending on the filter settings (teams, roles, and entries in the field filter), all employees defined in the resource pool and available for being assigned to actual activities.

- Enter a string value in the field **Filter** to show only certain employees (search via employee name and code) or enter two dots ".." in order to view the employees that have already been used in the project.
- **On-call** percentage of the possible working capacity of an employee within activity duration, adjusted for the reported non-working days (holidays/sickness).
- Availability percentage of the possible working capacity of an employee within activity duration, adjusted for the participation of the employee in other activities of the project.

1.4 Name:	software installation	ı planning			Code:	Fixed: Duration	✓ Effort:	72 Ph Duration: 4	.5 AT (8 Hrs.)
General 🗸 Roles	Employee T	imesheets Material	Machine type Machinery	Links Forma	at Userfields No	tes			
Preferred teams		Filter:			signed employees:			Resource pool	ОК
Role - qualification	Bal	Name On-	call Availa Role - qualif Pr	Costs 🔺 Na	ame O A Role - q	Pr Util Ad	A Effort Ne	eg Substitutio N	Cancel
programmer - C++	-36	Tidy, John	0 100 programmer 100	40.00					
analyst	-36	Sleeper	100 0 programmer 100	50.00					
		Eager	78 100 programmer 100	50.00					
		Slow Fast 21.11.16	100 100 programmer 100 100 100 programmer 18.11.16 -	- 22.11.16 1.5 software	transition planning				
SOURCE POOL: http://le	ocalhost/ris6/21 P	ORTFOLIO ON					E (WEEK1:3	-

- To include the workload in other projects that belong to a selected portfolio during scheduling, open the desired portfolio:
- Click on Start > Properties > Info

📄 Project
E Resource
1 Info
Properties

• Select the tab **Portfolio dashboard**.

		2				
						Reload Remov
urces	Project overv	view Portfolio o	lashboard	External docume	ents	
Completed	Code	Category	Priority	Status	Start	 ▼ Finish
0			100		23.11.15 08	:00 25.01.16 12:00
38			100		26.01.16 00	:00 16.02.16 00:00
0			100		27.01.16 00	:00 29.03.16 14:00
0			100		09.03.16 14	:00 29.03.16 14:00
0			100		28.03.16 00	:00 05.06.16 00:00
0			100		07.11.16 08	:00 11.01.17 14:00
	Completed 0 38 0 0 0 0	Completed Code 0 38 0 0 0 0 0 0 0 0 0 0 0 0 0	Completed Code Category 0 38 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Completed Code Category Priority 0 100 100 38 100 100 0 100 100 0 100 100 0 100 100 0 100 100	Completed Code Category Priority Status 0 100	Completed Code Category Priority Status Start 0 100 23.11.15 08 38 100 26.01.16 00 0 100 100 27.01.16 00 0 0.03.16 14 0 100 0.03.16 10 0.03.16 00 0.07.11.16 08

• Doubleclick on the entry in the central table to assign this employee to the activity.

operties																			
1.4 Name:	software inst	allation planning					C	ode:	Fi	ked:	Duration	-	Effort:	3	6 Ph	Du	ration:	4.5	AT (8 Hrs.)
General 🗸 Roles	 Employee 	Timesheets	Mat	erial	Machine type	Ν	lachir	nery L	inks	F	omat	User fi	elds	Note	es				
Preferred teams		Filter:				,	5	Assigned	employ	ees:				Re	source	pool			ОК
Role - qualification	Bal	Name	On-call	Availa	Role - qualif	Pr		Name	0	A	Role - q	Pr	Util	Ad	A	Effort	Neg	Si	Cancel
✓ programmer - C++	0	Sleeper	100	0	programmer	100		Slow	100	100	program	100	100			36			
analyst	-36	Eager	78	100	programmer	100													
		Slow	100	100	programmer	100			•									_	
double	oliok	Fast	100	100	programmer	100	-											_	
double	CHCK	•				Þ		4											

Assigned employees

- **On-call** percentage of the possible working capacity of an employee within activity duration, adjusted for the reported non-working days (holidays/sickness).
- Availability percentage of the possible working capacity of an employee within activity duration, adjusted for the participation of the employee in other activities of the project as well as their workload in this activity.
- Enter a differing value in percent in the field **Productivity** if the productivity of the employee in the activity differs (they are proposed from the resource pool).
- Enter a differing value in percent in the field **Workload** if the employees workload in the activity differs. If you have reported a role usage to the tab Roles, this workload will be taken over; otherwise, default workload is

100%.

- If you click on the icon in the field **Absence**, the window Absence with the calendar field opens where you can define the days the employee will not be participating in the activity.
- Enter a differing value in the field **Effort** for the effort that an employee has to perform within the activity.
- Select the check box Responsible, if the employee is to be registered as the person responsible for the activity.
- Enter notes that might be crucial for the employee in connection with the activity in the field Notes.
- Mark the check box **Utilize resources to the maximum** in order to obtain the shortest possible activity duration. This redistributes the effort of the resources with identical qualifications in a way to allow for a better resource utilization, which can affect the activity duration by, for instance, a higher percentage of readiness.
- Click on the button **OK**.

Notes:

• You can adjust the layout of the columns of the three tables at your convenience by rightclicking on the column names of the table and selecting the columns you want to adjust.



• In order to have quick access to the used resources, click on the button **Resource pool** if you are using the general resource pool - or on the button **Project resources** if you are using a project-specific resource pool.

1.1	Name: task 1					Code:	Fixed:	Duration	* B	fort:	32 Ph	Duration	i: 4	AT (8 Hrs.)
General 🗸	Roles Employee	Timesheets	Mater	rial	Machine type	Machinery	Links	Format	User	fields	Notes			
Filter:			-	8	Assigned roles:					F	lesource p	ool		OK
Role	Qualification		Costs		Role	Qualification		-	Quantity	Utilizat	Effort	Notes		Cano
programmer	C++		50.00		programmer	PHP			1	100	32			
programmer	PHP		45.00											
programmer	V.Basic		50.00											
writter			30.00											
manager			60.00											

4.9.5 Timesheet

Here you can display information about completed working hours in the activity.

Requirement You can only enter timesheet in the Rillsoft Integration Server interface.

In order to assign timesheet to the selected activities, do as follows:

• Activate the tab **Timesheet** in the window Activity properties.

lopment planning			Cod			
Timesheata			000	le Fi	ked: Duration - Effort 6.75 man D	uration 2.25 work-day (
Timesneets Materia	al Machine type M	achinery Links Form	nat Userfields	Notes	Documents	
	Times	heets:				OK
Target Actual	Open Notes Caler	darweek Day	Date T	arget Actual	Shift	Can
2.25 0	2.25 week	44/2019 Monday	28.10.19	1.13		
2.25 0	2.25 week	44/2019 Tuesday	29.10.19	1.13		
2.25 0	2.25 week	44/2019 Wednesday	30.10.19			
	week	44/2019 Thursday	31.10.19			
	week	44/2019 Friday	01.11.19			-
	•					•
	Target Actual 225 0 225 0 225 0 225 0	Target Actual Open Notes Calen 225 0 225 week week 225 0 225 week week	Target Actual Open Notes Calendar week Day 225 0 225 Week 44/2019 Monday 225 0 225 Week 44/2019 Tuesday 225 0 225 Week 44/2019 Week 44/2019 226 0 225 Week 44/2019 Week 44/2019 226 0 225 Week 44/2019 Thursday Week 44/2019 Friday Week 44/2019 Friday	Timesheets: Target Actual Open Notes Calendar week Day Date T 225 0 225 0 225 0 225 0 225 0 225 0 225 0 225 0 225 0 225 0 225 0 225 0 0.1019 Week 44/2019 Wednesday 30.10.19 Week 44/2019 Turusday 31.1019 Week 44/2019 Friday 01.11.19 Image: 1000 minipage 11.11.19 Image: 1000 minipage Image: 1000 minipage	Target Actual Open Notes Calendar week Day Date Target Actual 225 0 225 225 Week 44/2019 Monday 28.10.19 1.13 225 0 225 Week 44/2019 Tuesday 29.10.19 1.13 225 0 225 Week 44/2019 Weednesday 30.10.19 Week 44/2019 Week 44/2019 Tuesday 31.10.19 Week 44/2019 Tuesday 01.11.19 Herror	Timesheets: Target Actual Open Notes Calendar week Day Date Target Actual Shift 225 0 225 225 225 Usedsay 2810.19 1.13 Usedsay 1.10 Usedsay 1.13 Usedsay 1.10 Usedsay 1.13 Usedsay 1.13 Usedsay Usedsay 1.13 Usedsay 1.13 Usedsay Usedsay 1.13 Usedsay Usedsay 1.11 Usedsay Usedsay 1.11 Usedsay Usedsay 1.11 Usedsay Usedsay

Employees

All employees assigned to the task are listed here.

Name Name of assigned employee

Effort shows the effort planned in the activity for this employee

Close how much of the planned effort the employee has already done for the activity

Open shows still open effort in the activity for this employee

Notes Notes

Timesheet

Here you can see for an employee selected in the left table, how did he complete the task day by day.

Week in which calendar week did the employee work for the activity

Weekday on which day of the week the employee worked for the activity

Date Date

Effort shows the effort planned for this employee during the day and for the activity

Close shows how much of the planned effort the employee has already done on the day

Schicht daytime

4.9.6 Allocate material

In order to allocate material to the selected activities, do as follows:

• Activate the tab Material in the window Activity properties.

operties												
1.2 N	ame: task 2			Code:	Fixed:	Duration	• E	Effort:	40 Ph	Duration:	5	AT (8 Hrs.)
General 🗸 Ro	les 🗸 Employee	Timesheets 🗸 Materi	al Machine type	Machinery	Links	Format	User	fields	Notes			
Filter:		•	6 Assigned material	:				F	Resource p	ool		ОК
Material group	Material type	Costs	 Material group 	Material type			Unit	Calcul	Amount	Notes		Cancel
Metals	Steel	0.00	Metals	Steel			100 kg	Fix	2			
Metals	Stainless steel	0.00	Non-ferrous meta	ls Aluminium			1 kg	Fix	1			
Metals	Spring steel	0.00										
Non-ferrous metals	Aluminium	0.00										
Non-ferrous metals	Copper	0.00	T									

Available Material

- Enter a string value in the field **Filter** to show only certain materials (search via material group, material type and code) or enter two dots ".." in order to view the materials that have already been used in the project.
- Doubleclick on the entry in the left table to assign the material to the activity.

Allocated material

- Select calculation the type of material requirements in the field **Calculation**: **Fixed** The material requirements in the activity are fixed. **Per hour** The material requirements in the activity are calculated by considering the activity duration. **Per man-hour** The material requirements in the activity are calculated by considering the effort. **Per quantity** The material requirements in the activity are calculated by considering the working result.
- Enter a differing value of the material quantity, which is required for the activity, in the field Quantity.
- Enter notes that might be crucial for the material in connection with the activity in the field Notes.
- Click on the button **OK**.

Notes:

• You can adjust the layout of the columns of both tables at your convenience by rightclicking on the column names of the table and selecting the columns you want to adjust.

roperties								
1.2	lame: task 2			Code:	Fixed: [Ouration - Effort:	40 Ph Duration:	5 AT (8 Hrs.)
General 🗸 🗸	oles 🗸 Employee Timesheets	✓ Material	Machine type	Machinery Li	nks	Format User fields	Notes	
Filter:		→ 6	Assigned material:		-	Nr.	esource pool	ок
Material group	Material type	Costs 🔺	Material group	Material type 🧳		Material group	Amount Notes	Cancel
Metals	Steel	0.00	Metals	Steel		Code	2	
Metals	Stainless steel	0.00	Non-ferrous metals	Aluminium	\checkmark	Material type	1	
Metals	Spring steel	0.00			\checkmark	Unit		
Non-ferrous metals	Aluminium	0.00				Calculation		
Non-fermus metals	Copper	• • •			$\overline{\checkmark}$	Amount		
					✓	Notes		1

• In order to have quick access to the used resources, click on the button **Resource pool** if you are using the general resource pool - or on the button **Project resources** if you are using a project-specific resource pool.

1.1 Name: task 1 Code: Fixed: Duration Effort: 32 Ph Duration: 4 AT (8 Hrs.) General ✓ Roles Employee Timesheets Material Machine type Machinery Links Format User fields Notes Filter: - 8 Assigned roles: Resource pool OK Cancel Cancel Cancel programmer C++ 50.00 Programmer PHP 1 100 32 Ph Cancel writter 30.00 Timeshoet 50.00 Timeshoet Timeshoet Timeshoet Timeshoet Timeshoet Timeshoet Timeshoet Cancel Timeshoet	Properties															
General ✓ Roles Employee Timesheets Material Machine type Machinery Links Format User fields Notes Filter: ✓ 8 Assigned roles: Resource pool OK Role Qualification Costs ▲ Role Qualification Qualification OK programmer C++ 50.00 programmer PHP 1 100 32 programmer V.Basic 50.00 0 <td< td=""><td>1.1</td><td>Name:</td><td>task 1</td><td></td><td></td><td></td><td></td><td>Code:</td><td>Fixed:</td><td>Duration</td><td></td><td>ffort:</td><td>32 Ph</td><td>Duration</td><td>4</td><td>AT (8 Hrs.)</td></td<>	1.1	Name:	task 1					Code:	Fixed:	Duration		ffort:	32 Ph	Duration	4	AT (8 Hrs.)
Filter: Image: Construction Assigned roles: Resource pool Role Qualification Costs Image: Construction Role Qualification Qualifi	General 🗸	* Roles	Employee	Timesheets	Mater	ial	Machine type	Machinery	Links	Format	User	fields	Notes			
Role Qualification Costs A Role Qualification Quantity Utilizat Effort Notes programmer C++ 50.00 programmer PHP 1 100 32 programmer V.Basic 50.00 - - - - - writter 30.00 - - - - - -	Filter:				Ψ	8	Assigned roles:				-	F	Resource p	ool		ОК
programmer C++ 50.00 programmer PHP 1 100 32 programmer PHP 45.00	Role	Qualifica	ation		Costs		Role	Qualification		-	Quantity	Utilizat	Effort	Notes		Cancel
programmer PHP 45.00 programmer V.Basic 50.00 wrtter 30.00	programmer	C++			50.00		programmer	PHP			1	100	32			
programmer V.Basic 50.00 writter 30.00	programmer	PHP			45.00											
writter 30.00	programmer	V.Basic			50.00											
	writter				30.00											
manager 60.00	manager				60.00	•										

4.9.7 Allocate machine types

In order to allocate machine types to the selected activities, do as follows:

• Activate the tab Machine types in the window Activity properties.

Properties									
1.2 Name: task 2			Code:	Fixed:	Duration	✓ Effort:	40 Ph	Duration:	5 AT (8 Hrs.)
General ✓ Roles ✓ Employee Timesheets	✓ Material	Machine type	Machinery	Links	Format	User fields	Notes		
Filter:	- 2	Assigned machine typ	es:			F	Resource p	lool	ОК
Machine groups Machine type	Costs	Machine groups	Machine type			Quantity	Utilizat	Notes	Cancel
Rotate machine	0.00	Rotate machine				1	100		
Milling machine	0.00								

Available machine types The left table shows you all the machine types defined in the basic resources.

- Enter a string value in the field **Filter** to show only certain machines (search via the machine group, type and code) or enter two dots ".." in order to view the machine types that have already been used in the project.
- Doubleclick on the entry in the left table to allocate this machine type to the activity. **Allocated machine types** The right table shows you the machine types already selected for the activity.
- Enter the number of machine types required for this activity in the field Number.
- Enter the machine type usage of this activity in the field Usage.
- Enter notes that might be crucial for the machine types in connection with the activity in the field **Notes**.
- Click on the button **OK**.

Notes:

• You can adjust the layout of the columns of both tables at your convenience by rightclicking on the column names of the table and selecting the columns you want to adjust.

Properties										
1.2 Name: task 2			Code:	Fixed:	Dura	tion - Effort:	40	Ph	Duration:	5 AT (8 Hrs.)
General ✓ Roles ✓ Employee Timesheets	 Material 	Machine type	Machinery	Links	For	mat Userfield	s N	otes		
Filter:	- 2	Assigned machine type	es:				Res	ource p	ool	ОК
Machine groups Machine type	Costs	Machine groups	Machine type	1		Nr.		zat	Notes	Cancel
Rotate machine	0.00	Rotate machine				Machine groups		100		
Milling machine	0.00					Code				
					\checkmark	Machine type		-		
					\checkmark	Quantity		-		
					\checkmark	Utilization				
					\checkmark	Notes				

- In order to have quick access to the used resources, click on the button **Resource pool** if you are using the general resource pool or on the button **Project resources** if you are using a project-specific resource pool.
- The time of use will be calculated automatically.

operties														
1.1	Name: task 1					Code:	Fixed:	Duration	• E	ffort:	32 Ph	Duratio	n: 4	4 AT (8 Hrs.)
General 🗸	Roles Employee	Timesheets	Mater	ial	Machine type	Machinery	Links	Format	User	fields	Notes			
Filter:			•	8	Assigned roles:				1	F	Resource p	ool		ок
Role	Qualification		Costs		Role	Qualification		-	Quantity	Utilizat	Effort	Notes		Cancel
programmer	C++		50.00		programmer	PHP			1	100	32			
programmer	PHP		45.00											
programmer	V.Basic		50.00											
writter			30.00											
manager			60.00	-										

4.9.8 Allocate machinery

In order to allocate machines to the selected activities, do as follows:

• Activate the tab Machinery in the window Activity properties.

Properties																
1.4 Name: 4	software insta	Ilation planning				(Code:	Fixed:	Duration	Ŧ	Effort:	36	Ph	Duration:	4.5	AT (8 Hrs.)
General 🗸 Roles 🗸	Employee	Timesheets	Mater	ial Mach	ine type	Mach	inery Lin	ks	Format	User	fields	Notes				
Preferred team		Filter:			*	1	Assigned ma	chine:		[Resou	irce poo	ol		ОК
Machine group - Machi	Bal	Machine n	A Mach	nine group	Costs		Machine na	me	A	Machir	ne group -	Machi	Util	N		Cancel
Rotate machine	0	machine 1	100 Rotat	e machine	85.00		machine 1		100	Rotate	machine		100			

Allocated machine groups - machine types This table lists the allocated machine types in order to support you in selecting the machinery.

- The marked check box of a machine group / machine type is an additional filter for the machinery list. The list Machinery shows you only those machines that have the corresponding machine group and machine type.
- The field Quantity-utilization contains the required number of machines as well as their utilization for the machine type. This column is deactivated by default. If you want to unhide it, please refer to Details.
- The field Balance contains the dynamically calculated difference between the requested number for a machine type and the total number of the already assigned machines with the same machine type. Support in the control-

ling of the required machinery allocations. A negative value, for instance, indicates that more machines of this machine group and machine type are required.

Mark the check box **Preferred and assigned teams** to use the assigned teams as an additional filter for the list Machinery. The list Machinery will show you then only those machines that belong to the assigned teams.

Available machinery Depending on the filter settings (teams, machine type and the entries in the field Filter), the central table shows you the machinery as defined in the basic resources. Enter a string value in the field **Filter** to show only certain machines (search via the machine group, type and code) or enter two dots ".." in order to view the machines that have already been used in the project.

- The field Availability shows the percentage of the possible working capacity of a machine within activity duration, adjusted for the participation of the machine in other project activities.
- Um bei der Einplanung die Maschinen-Auslastung in anderen Projekten, die zu einem ausgewählten Portfolio zugehören, zu berücksichtigen, öffnen Sie das gewünschte Portfolio:
- Klicken Sie Start > Eigenschaften > Info



• Select the tab Portfolio dashboard.

operties						1	
Selected portfolio: 2016 portfolio			1	2		R	eload Remove
Late activities Overallocated resources Failed resources ! Unassigned reso	urces	Project over	view Portfoli	o dashboard	External do	cuments	
Name	Completed	Code	Category	Priority	Status	Start 👻	Finish
✓ software development process	0			100		23.11.15 08:00	25.01.16 12:00
✓ Project 1	38			100		26.01.16 00:00	16.02.16 00:00
new_software development process	0			100		27.01.16 00:00	29.03.16 14:00
Project2	0			100		09.03.16 14:00	29.03.16 14:00
✓ 2016_2_soft	0			100		28.03.16 00:00	05.06.16 00:00
✓ process ABC 3	0			100		07.11.16 08:00	11.01.17 14:00

• Doubleclick on the entry in the central table to allocate this machine to the activity.

1.5 Name:	software tran	sition planning				С	ode: Fixed: D	uration	✓ Effort: 24	Ph	Duration:	3 AT (8 Hrs.)
General 🗸 Roles	 Employee 	Timesheets		Material Machir	ne type	Machir	nery Links For	mat	User fields Notes			
Preferred team		Filter:			-	1	Assigned machine:		Resou	irce poo	bl	ОК
Machine group - Machi	Bal	Machine n	A	Machine group	Costs		Machine name	A	Machine group - Machi	Util	N	Cance
Rotate machine	-1	machine 1	0	Rotate machine	85.00		machine 2	100	Milling machine	100		
Milling machine	0											
		double o	lick									

Allocated machines

The right table shows you the machines already selected for the activity.

- Enter the machine usage of this activity in the field Usage.
- Enter notes that might be crucial for the machine in connection with the activity in the field Notes.
- Click on the button **OK**.

Notes:

• You can adjust the columns layout of the three tables at your convenience by rightclicking on the column names of the table and selecting the columns you want to adjust.

Properties								
1.5 Name:	software tran	sition planning			Code: Fixed: Dura	ion +	Effort: 24 Ph Duration: 3 AT	(8 Hrs.)
General 🗸 Roles	 Employee 	Timesheets	Material Ma	chine type	Machinery Links Format	User	r fields Notes	
Preferred team		Filter:		*	1 Assigned machine:		Nr.	ОК
							Machine name	
Machine group - Machi	Bal	Machine n	A Machine group	Costs	Machine name	A M	Code	Cancel
Rotate machine	-1	machine 1	0 Rotate machine	85.00	machine 2	100 M 🗸	Availability	
Milling machine	0						Working group - team	
						✓	Machine group - Machine type	
						\checkmark	Utilization	
							Notes	

• In order to have quick access to the used resources, click on the button **Resource pool** if you are using the general resource pool - or on the button **Project resources** if you are using a project-specific resource pool.

operties															
1.1	Name:	task 1					Code:	Fixed:	Duration	- E	ffort:	32 Ph	Duratio	n: 4	4 AT (8 Hrs.)
General 🗸	Roles	Employee	Timesheets	Mater	rial	Machine type	Machinery	Links	Format	User	fields	Notes			
Filter:				.	8	Assigned roles:				-	F	Resource p	ool		ок
Role	Qualifica	tion		Costs		Role	Qualification		-	Quantity	Utilizat	Effort	Notes		Cancel
programmer	C++			50.00		programmer	PHP			1	100	32			
programmer	PHP			45.00											
programmer	V.Basic			50.00											
writter				30.00											
manager				60.00	•										

• The time of use will be calculated automatically.

4.9.9 Check links

In order to check links, activate the tab Links in the window Activity properties.

roperties											
1.2	Name: tas	sk 2				Code:	Fixed	: Duration	✓ Effort: 40 Ph	Duration: 5 A	T (8 Hrs.)
General 🗸 🗸	Roles 🗸 🗸 E	mployee	Timesheets	✓ Material 🗸 🗸	Machine type	✓ Machinery	Links	Format	User fields Notes		
Predecessor:				Successor:				Incompati	ble activities:		OK
Link type	Nr.	Name	Dur	Link type	Nr.	Name	Dur	Nr.	Name	Dur	Cancel
Finish to start	1.1	task 1	32	Finish to start	3	project end	0				

"From" activity - The left table shows you all link types of the "from" activities along with the corresponding number and description of the activity.

"To" activity - The table in the centre shows you all link types of the "to" activities.

Incompatible activities - The right table shows you all incompatible activities.

4.9.10 Define format

You can define the bar labelling and colour for activities and subprojects at your convenience.

In order to define the format, do as follows:

• Activate the tab **Format** in the window Activity properties.

operties					
1.2 Name:	task 2			Code:	Fixed: Duration - Effort: 40 Ph Duration: 5 AT (8 Hrs.)
General 🗸 Roles	🗸 Employee Timesheets 🗸 Ma	terial	✓ Machine	type 🗸 Machinery	Links Format User fields Notes
Fields:			Bar labelling:		ок
Name	Description		Туре	Position	Content Cancel
%payment_date%	Zahlungseingang		Activity	Top left	
%resource_employee_role	s Rollen 📃		Activity	Bottom left	
%resource_teams%	Teams		Activity	Top right	%resource_employee_roles%
%resource_employees%	Personal		Activity	Bottom right	
%resource_materials%	Material doubleclick		Activity	Bottom	
%maauma machina ralaa	Manchinonation	-			

• Select the variables you want to integrate into the labelling from the list Fields.

You can use the field **Bar labelling** to define the bar labelling of activities and subprojects.

- The field Type shows which of the objects activities or subprojects will be labelled.
- The field **Position** shows the position of the labelling.
- The field Content shows the content of the labelling. Depending on the preferred position, set the cursor on the corresponding content field.
- Enter either the labelling or select a predefined field from the drop down list Fields and doubleclick.
- Click on the button **OK**.

Notes

If several activities are shown in a row, the internal activities can be labelled just below.

R 🛛 🧯	₽ 5 ♂ ⊡'	Ŧ	GANTT (HART										Ur	nbenan	int																		-		×
FILE	START PR	OJECT	FORM	1AT																																^
Gant	Variance anal Network diag Gantt-networ	ysis ram k chart	Employee	Can Role	8 ∎ En 8 ∎ M	nployee achine	. III Reso ☆ Cost T Gant	ource char tt cha	chart t ▼ urt	•	t <mark>im Sa</mark> I <mark>≓</mark> M ⊡ Sh	anag anag	e Pr	- oject	Resou	urce	o× ➡	25×	50×	75×	100×	t∎ †⊐ to	Activ Subp Link	ity • proje	ct 🕶	Str	tuctur	*= == =	* *	Y 🥆	•		Cu Cu Pro	toff d rrent iject s	late date tart s	,
	Activity views		Resourc	e views	Capac	ity views	Addit	ional	view		User	views		Pro	perties			Sch	hedul	le			Ins	ert			Out	ine		Ec	lit		Sc	rollin	g	
		Cutoff d	ate: 02.02.1	16 00:00			<<	01	02	03 (04 0	5 06	07	08	09.1	0.1	1 12	13	Febru	uary:	2016	17	18	19	20	21	22	23 . 2	4 25	20	5 27	7 28	29	01	02	03
Nr.	Name	Effo	rt Dur	Start		Finish		М	т	w	T F	s	S	м	τν	νт	r F	S	S	М	т	w	т	F	S	s	M	τι	N T	F	s	s	М	т	w	т
1	task 1	1	10 14	02.02.16	08:00	19.02.1	6 17:00	sk 1						ť.						•					task	3										_
*								t	op I	eft						m						to	op ri	ight	t											▼
	2 Name:	task 2															Code:			Fixe	d: D	uratio	n	*	Effo	ort:		4 F	'h l	Durat	ion:		5 A'	F (8 H	rs.)	
Ge	neral Roles	Employ	ree 1	îmesheets	Ma	iterial	Machine	type		Macł	hinery		Links		Forma	t	Use	r field	s	No	otes												_			_
Field	ls:								Bar	label	ling:																								ок	
Na	ne	Descript	tion					-	Ту	ре		Positi	on		Con	tent																		C	ancel	
%ni	ame%	Name							Ac	ivity		Bottor	n left																							
%lo	ng_name%	Name m	it Nr.						Ac	ivity		Top ri	ght																							
%рі	arent_name%	Name d	es oberen	Teilprojekts					Ad	ivity		Bottor	n right																							
%to	p_parent_name%	Name d	es oberster	Teilprojekt	S			-	Ad	ivity		Bottor	n		%na	me%																÷.				
	pareni name 4	ivamen	oer oderen	телотолекте																																
RESO	JRCE POOL: http://lo	ocalhost/r	is6/21																							E			DAY 1	:1						+

4.9.11 Fill in user-defined fields

In order to fill in user-defined fields, do as follows:

• Activate the tab User-defined fields in the window Activity properties.

rope	erties								
- [1.1 Name: task 1			Code:	Fixed: Du	uration - Effort:	32 Ph	Duration: 4 AT (8	Hrs.)
Gen	eral 🗸 Roles Employee	Timesheets Material	Machine type	Machinery	Links F	Format 🗸 User fields	Notes		
Nr.	Name	Text							OK
1	Observer	Kate White							Cancel
2	Customer	Bill Green							
3									
4									
5									
6								-	

- Enter the text of your choice.
- Click on the button **OK**.

Note:

• First you need to define the Name of the user-defined fields in Project properties.

4.9.12 Enter notes & links

You can use this tab to enter notes, attach links to the activity and link the activity with document and graphic files. You can use the following key words for links:

- http:// for hyperlinks
- https://
- mailto:
- ftp://
- news:
- telnet:
- file: for document and graphic files

You may proceed as follows:

• Activate the tab Notes & links in the window Activity properties.

Properties	
1.1 Name: software development planning	Code: Fixed: Duration - Effort: 6.75 man- Duration: 2.25 work-day (8 Hrs.
General ✔ Roles Employee Material Machine type Machinery Links Format	User fields Notes
Insert hyperlink to external document	
file://D:\01 RP\schema.pdf	Cancel
1	2

- Enter the text of your notes.
- If you click the button Insert Hyperlink to external document, you can create a reference to an internal file.
- If you click the button Insert Hyperlink to external folder, you can create a reference to an internal folder.
- To insert a reference to external website, enter the preferred Internet address such as http://www.rillsoft.de/
- Click on the button **OK**.

Alternatively: If you rightclick on the tab field in Notes & links-tab field, you can select one of the following commands in the context menu.

5	Undo	Alt+Backspace
Ж	Cut	Shift+Delete
Ē	Сору	Ctrl+C
Ĝ	Paste	Ctrl+V
	Clear	
	All select	Ctrl+A

4.9.13 Assign documents in the DMS

Documents in the DMS (Document Management System) can be assigned only in the database-based solution Rillsoft Project with Rillsoft Integration Server.

To assign documents to a selected activity, please proceed as follows:

Activate the Documents tab in the activity properties window



The Insert button allows you to add a new document to an activity.

If you have already marked a document, you can delete, download and update.

On this tab you can see information divided into two areas.

Properties		
1.1 Name software development planning	Code F	Fixed: Duration • Effort: 6.75 man Duration 2.25 work-day (8 Hrs
General ✔Roles Employee Timesheets Material Mach	ne type Machinery Links Format User	r fields Notes Cocuments
Add Delete Download	Update	UK
Root Folder	File name 💌 Desc	cription Size Cancel
	softwaredevelopment-process1.png	17.62 KE
Contracts	<u> </u>	
Technical documents (1)		
2021		
	4	▶

A document directory structure is shown on the left. The number of documents added is shown in brackets next to a directory name.

When you click on a directory name, you will see a directory content with brief information in the right area.

You can edit documents using the corresponding button:

• Add
- Delete
- Download
- Update

Drog & Drap You can use this function by dragging selected documents with the left mouse button pressed into the right area.



Manage documents in the project or portfolio

You can manage all documents assigned to a project or portfolio in the Rillsoft Integration Server Document dialog.

Click Project> Rillsoft Integration Server> Project Documents.

R		🗄 ५ 🗟 🗖] ∓	GANTT	CHART			softw	are development process	
F	FILE	START	PRO		MAT			and the second		
	/	📕 Earliest star	t date	Employee *	늘 Add		🖅 Resource pool	Save on workplace	# Save settings	Cross-project links
		🕨 Latest start	date	Machine *	🖕 Select		🚮 Project resources	Copy from workplace	A Save headers and footer	Project documents
Ta ON	ake ver	Other functions	5 *	Split activity	🍋 Delete	Resource	S		Save user views	Save report data
		Schedule		Assistant	Baseline	Р	roject resources	Project settings	Rillsoft integr	ation server

Here you can also filter out any documents.

📧 Rillsoft integration server docum	nent							×
Add Delete	Download	Update	Filter:					
Controller (1)	Nr.	Project	Subproject/Activity	Code	File name 🔹 👻	Description	Size Last m	nodified Author
	1.1	software developm	Activity: software development pl		softwaredevelopme		17.62 KB 24.02.2	21 15:56 Admin
Technical documents (1)								
2021								
All documents	4							Þ
		ОК	Cancel					

4.10 Split activities



In order to split an existing activity, do as follows:

• Click Start> Schedule> ... and one of the split-functions.

Alternatively: This function is available via the context menu of the activity.

Rightclick on the activity in the diagram field.

12	13	14	15
Cost estimate		Project procedu	Ire
	¥ Cut ≌ Copy	With Completing the con Umschalt+Entf Strg+C	struction schedule Create t
	Move in subproject	nç	g for phase 1
	Previous activity customize t Successor activity customize	he latest start time the earliest start time	
/	Completed Split		In several activities
	Remove from incompatible of Incoming link delete Outbound link delete	jroup	By start shift ► By double assigned ►

Select the command **Split** from the context menu and choose one of the following functions:

- · into several activities
- from the completed part
- at the first shift
- in case of several assignments

Split into several activities

Split	activity in several act	ivities			— X
^p arts by:	Duration	÷ 213	2 3		AT
⊻ Creat _ Merg	e finish-to-start betweer e into one line	activities links			
Nr.	Measurement	Deliverable	Effort	Duration	Costs
1	14.41 %		15.99 Ph	2 AT	
2	7.2 %		8 Ph	1 AT	
3	21.61 %		23.99 Ph	3 AT	
4	14.41 %		15.99 Ph	2 AT	
5	21.61 %		23.99 Ph	3 AT	
6	20.75 %		23.03 Ph	2.88 AT	
		ОК	Cancel		

Define the activity parameter according to which you want to split the activities in the field **Split into**. You can choose between the following parameters

- Percentage,
- Deliverable,
- Effort,
- Duration,
- Costs

The values to be entered in the next field need to be separated by **blank spaces**.

R Split ac	tivity in several activities	X
Parts by:	Duration 21323] AT
⊡ Create f	inish-to-start between activities links	

Mark the check box **Create finish-start links between activities** if you want to link the split activities with each other. Mark the check box **Show in one row** if you want to have the split activities displayed in one row. The list shows the split activities.

Split from the completed part

This command is activated if a part of an activity has been completed. In this case, the split date will be shown in brackets. An activity is split into two activities, the first is 100% completed, the second has not yet started.

Split at the first shift

You can choose among the various due dates in the list, which mark the start of the next shifts.

Split in case of several assignments

This function is activated if two or more activities are executed at a time and more than one of these activities has been assigned to the same resource. In order to avoid several assignents of one resource, you can split one activity before the start of the other activity. You will find the program which offers you automatically the possible dates.

4.11 Split activities into places / subproject

In order to split activities into places / subproject, do as follows:

• Select the menu item Project > Assistant > Split activities into places / spaces.

Activitie	es for Places/Spaces - Step 1 of 2: Places/Spaces Set	
Nr.	Name	
1	Offer	
2	Run	
3	Levy	
•		
		Weiter > Abbrechen

• Enter the places / spaces you want to display later as spacess into this list.

You can use these places / spaces to also split activities in the next step.

arts by:	Effort 👻						
Nr.	Name	Total	Rest	Offer	Run	Levy	
1	Building	112 Ph	4 Ph	38	33	37	
				N 1			

- Select the activity parameter according to which you want to split activities from the drop down list **Divide by**. You can choose between the following parameters
- Percentage,
- Deliverable,
- Effort,
- Duration,
- Costs

The following activity list shows all activities which can be split into the places / spaces by entering them in the column below the corresponding place / spaces.

Display of the project schedule before the splitting into places / spaces.

R <mark>e</mark> 🥻	🔒 ५ ले 📷	·	GANTT CH	ART								Unb	enanı	nt																	-		×
FILE	START PR	ROJECT	FORMAT	r																													^
1	📕 Earliest start (date Empl	oyee 🔹	늘 Add	Ci Re	sour	e pool		🖏 Sa	ave or	worl	kplace		📲 Sa	ave se	tting	s			🔜 Cr	oss-p	orojec	t link	cs									
Taka	🕨 Latest start da	ate Mach	nine 🔻	🖕 Select	Basaursas Pr	oject	resourc	es	** <mark>} C</mark> (opy fr	om w	orkpla	ce	A Sa	ave he	eader	s and	foote	rs														
over	Other functions	• 🗄 s	plit activity	/ 🍝 Delete	Resources									Sa Sa	ave us	ser vie	ews																
	Schedule	A	ssistant	Baseline	Project re	ourc	es		P	rojed	t setti	ngs					Inte	gratio	on se	rver													
		Cutoff date	: 02.02.16	00:00	~~	01	02 0	3 0.	4 05	06	07	08 0	2 10	11	12	13	ebrua	ry 201	16 3 17	18	10	20	21	22	23	24	25	26	27	28	29 0	1 0'	2 03
Nr.	Name	Effort	Dur S	tart	Finish	M	T V	V T	F	S	s	мт	w	т	F	S	S I	м т	w	Т	F	S	S	М	T	W	T	F	s	S	M T	r w	T
1	Building	112	14 0	2.02.16 08:00	19.02.16 17:00		1						anana ananan	innin minnin				anna anna		annan annan		Build	ding										
*																																	
																																	-
•						_																							-				•
	1 Name:	Building												Co	de:		F	ixed:	Dura	tion	Ŧ	Eff	fort:		112	Ph	Du	ration:		14	AT (8	Hrs.)	
Ge	neral Roles	Employee	Tim	esheets M	aterial Machin	e type		Machi	nerv	L	inks	F	omat		User	fields		Notes															
L - D	e date		Activit	tv calendar:				_			-				_																	ОК	
	Date	Time	Proje	ct calendar	Ψ.			Com	pleted		0	%	Col	or: L		Autor	natic c	olor	*														
	Start: 02.02.16	· 08:00				_	Financi	Fixed	costs:		0	€																				Cano	el
	Finish: 19.02.16	× 17:00	🗌 Dis	sregard team and	employee calendar		Invo	ice ar	nount:		0	e																					
	Fix		□ Sta	art of activity only	at first shift		Term	of pa	yment:		0	wor																					
	1.05							R	eceipt:			Ŧ																					
	Mark as milestone		□ Me	erge into one line																													
RESO	JRCE POOL: http://l	ocalhost/ris6	/21							_				_		_		_			_	_	E		1.	DA	¥1:	1 -			-1		+ .::

Display of the project schedule after the splitting into places / spaces.



4.12 Subprojects

4.12.1 Create subproject

You can create:

- a new subproject
- subproject from file
- subproject from Rillsoft Integration Server template

In order to create a new subproject in the table, do as follows:

1. Select the menu item **Start > Insert > Subproject**.



2. Enter a subproject's name for in the appropriate row.

Create a new subproject in any area in the Gantt chart

- 1. Set the cursor on any area of the Gantt chart, where you want to create a blank Project.
- 2. Click with the right mouse button and select from the context menu New Subproject.



Add selected activities to the new subproject

You can add several pactivities to a new subproject doing as follows:

- 1. Mark with the pressed left mouse button several activities
- 2. Finally, click on Start > Add > Subproject

In this case, the start and finish dates of activities are assumed as the start and the end of the Subproject.

Re 📁	⊟ 5 ∂ ⊡	н	GANTT	CHART									U	nbenar	nnt																		-		×
FILE	START P	ROJECT	FOR	TAN																															^
Gant	Variance ana Network diag	lysis gram rk chart	Employee	Cther	& E mj ∦ M a	chine	Cost	urce char t cha	chart ▼ t ▼ rt		Save Mana Show	ge Ţ	Projec	t Reso	urce	×0	25%	50× 7	5× 10	0×	t= / t- s tso (Activi Subp Link 1	ty rojec	ct •	[Str	uctur	*= -= *	+ + +	▼ <u>₹</u> -	•	▼ 	Cuto Curro Proje	ff dat ent da ect sta	te ate irt •	
	Activity views		Resour	ce views	Capacit	y views	Additi	onal	view	U	ser viev	VS	Pro	operties			Sch	nedule	2			Inse	rt		١.	Out	line		Ed	it		Scro	lling		-
		Cutoff d	late: 02.02	16 00:00			<<	01	02 03	04	05	06.0	7 08	09 1	0 . 11	1 12	13	Febru	ary 2	016	17	18 . 1	19 . :	20	2 21	22	23 2	4 2	5 26	27	28	29	01	02 0	
Nr.	Name	Effo	ort Dur	Start		Finish	_	M	T W	T	F	s s	5 M	T N	N T	F	S	S	M	т	w	т	F	S	s	M	T V	N T	- F	S	S	M	т	w	T
1	task 1	1	16 2	02.02.16	08:00	03.02.16 1	7:00			tas	k 1																								-
2	task 2		8 1	04.02.16	08:00	04.02.16 1	7:00				task	2									,														
3	task 3	2	24 3	05.02.16	08:00	09.02.16 1	7:00				+			ta	isk 3																				_
4	task 4	1	16 2	10.02.16	08:00	11.02.16 1	7:00							L.		tas	K 4			- 1	ack	5													
5	task 5	1	24 3	12.02.16	08:00	16.02.16 1	7:00									4				ľ	SN .	3	_ t	aski	6										
•	task b	2	24 3	17.02.16	08:00	19.02.16 1	7:00			1	1																								-
							_		1																										
									1																										
4																																		•	
																										_	_			_		-			-
U	Selected po	rtfolio:																									R	eload		Ren	nove				
Pr	oject overview	Portfolio da	ashboard	Externa	al documer	nts																													
Ac	tivities	-	Proje	ct		Ong	igoing ar	nd yet	-to-begin	activ	rities																				_				
Co	mpleted:	0	Com	olete:	0 3	% Nr	r.	Na	me																	Du	ration	1	Dif	ferenc	e				
St	arted:	0	Rese	rve:	3.3 d	lay 1		tas	k 1																		2	2		+0.3	33				
St	II not started:	6																																	
AI		6																																	
RESO	URCE POOL: http://l	localhost/r	ris6/21																						E			DAY 1							

4.12.2 Insert subprojects from file

Insert a new subproject in the end of the activity table

• Choose the menu item Start > Insert > Subproject from file template

🛀 Activity 👻		* <u>-</u> -	▼	Y
🗂 Subproject 👻		- 🗄 👻	X • •	
🗂 Subproject				
늘 Subproject f	rom file te	mplate		
* Subproject f	rom integi	ration se	rver template	

- The dialogue box **Open** appears.
- Select the project you want to insert.
- Set at the start or end of the subproject.
- You cannot assume the whole project but only selected activities as subproject by marking appropriate activities.

RE Select of Activity fro	m Template			×
Start: 03.02.16	÷ 00:00			
○ Finish: 05.04.16	14:00			
For all activities chang	e: Duration - Sca	le factor:	1	
		-		
Nr.	Name	Start	Finish	Notes
	software development process	25.11.10 00:00	26.01.11 14:00	
⊡1	project planning and oversight	25.11.10 08:00	08.12.10 11:00	
⊻1.1	software development planning	25.11.10 08:00	26.11.10 17:00	
⊻1.2	system test planning	25.11.10 08:00	30.11.10 16:00	
⊻1.3	software installation planning	30.11.10 16:00	07.12.10 09:00	
⊻1.4	software transition planning	30.11.10 16:00	02.12.10 17:00	
☑ 1.5	following and updating plans	07.12.10 09:00	08.12.10 11:00	
⊘ 2	establishing a software development enviro	08.12.10 11:00	21.12.10 11:00	
⊘ 2.1	software engineering environment	08.12.10 11:00	15.12.10 11:00	
√2.2	software test environment	08.12.10 11:00	10.12.10 11:00	
√2.3	software development library	08.12.10 11:00	10.12.10 17:00	
⊘ 2.4	software development files	13.12.10 08:00	17.12.10 12:00	
✓2.5	non-deliverable software	17.12.10 13:00	21.12.10 11:00	
⊠3	system requirements analysis	21.12.10 11:00	29.12.10 09:00	
⊠ 3.1	analysis of user input	21.12.10 11:00	23.12.10 15:00	
✓3.2	operational concept	23.12.10 15:00	29.12.10 09:00	
✓3.3	system requirements	23.12.10 15:00	27.12.10 14:00	
✓4	system design	23.12.10 15:00	30.12.10 17:00	
⊻5	software requirements analysis	23.12.10 15:00	29.12.10 12:00	
	software implementation and unit testing	31.12.10 08:00	06.01.11 17:00	
⊘ 6.1	software implementation	31.12.10 08:00	06.01.11 17:00	
.∠6.2	unit testing	31.12.10 08:00	05.01.11 16:00	
	test case/procedure implementation	31.12.10 08:00	05.01.11 17:00	
⊘7	unit integration and testing	31.12.10 08:00	05.01.11 10:00	
✓8	qualification testing	05.01.11 10:00	07.01.11 16:00	
⊘ 9	system qualification testing	07.01.11 16:00	13.01.11 11:00	
√10	software configuration management	07 01 11 16:00	12 01 11 12:00	•
		ОК	Cancel]

• Click on the button **OK**.

Note:

Inserted from the file-template project should work with the same resource pool as the main project. If there is a resource difference, the message appears.



You should open the project inserted from template separately in Rillsoft Project and switch to the resource pool.

Follow the instructions under Shift to the resource pool.

Insert a new subproject in any area in the Gantt chart

- 1. Set the cursor on a field in the Gantt chart where you want to insert a subproject.
- 2. Click the right mouse button and select the item from the context menu New subproject from template file.
- 3. Continue as described above.

Ċ	Paste	Strg+V
	Select all	Strg+A
	New activity	
	New activity from template file	
	New activity from integration server templat	e
	New subproject	
	New subproject from template file	
	New subproject from integration server tem	plate

4.12.3 Insert subprojects from Rillsoft Integration Server template

Insert a new subproject in the end of the activity table

1. Select the menu item Start > Insert > Subproject from Rillsoft Integration Server template.

🛀 Activity 👻		* <u>]</u> +	T •	Y
🗂 Subproject 👻		-∃ -	X • •	
🗂 Subproject				
놜 Subproject f	rom file te	mplate		
* Subproject f	rom integr	ation se	rver template	

- The dialogue box **Open** appears.
- Select the project you want to insert.
- Set start or end of the subproject.
- You cannot assume the whole project but only selected activities as subproject by marking appropriate activities.

R Select of Activity from Template										
Start: 03.02.16	÷ 00:00									
○ Finish: 05.04.16	▼ 14:00									
For all activities changed	ge: Duration - Sca	le factor:	1							
Nr.	Name	Start	Finish	Notes						
	software development process	25.11.10 00:00	26.01.11 14:00							
⊡1	project planning and oversight	25.11.10 08:00	08.12.10 11:00							
⊻ 1.1	software development planning	25.11.10 08:00	26.11.10 17:00							
⊻1.2	system test planning	25.11.10 08:00	30.11.10 16:00							
⊻1.3	software installation planning	30.11.10 16:00	07.12.10 09:00							
⊻1.4	software transition planning	30.11.10 16:00	02.12.10 17:00							
⊻1.5	following and updating plans	07.12.10 09:00	08.12.10 11:00							
⊘ 2	establishing a software development enviro	08.12.10 11:00	21.12.10 11:00							
⊻2.1	software engineering environment	08.12.10 11:00	15.12.10 11:00							
√2.2	software test environment	08.12.10 11:00	10.12.10 11:00							
√2.3	software development library	08.12.10 11:00	10.12.10 17:00							
√2.4	software development files	13.12.10 08:00	17.12.10 12:00							
✓2.5	non-deliverable software	17.12.10 13:00	21.12.10 11:00							
⊠3	system requirements analysis	21.12.10 11:00	29.12.10 09:00							
⊴3.1	analysis of user input	21.12.10 11:00	23.12.10 15:00							
☑3.2	operational concept	23.12.10 15:00	29.12.10 09:00							
√3.3	system requirements	23.12.10 15:00	27.12.10 14:00							
✓4	system design	23.12.10 15:00	30.12.10 17:00							
√5	software requirements analysis	23.12.10 15:00	29.12.10 12:00							
	software implementation and unit testing	31.12.10 08:00	06.01.11 17:00							
.√6.1	software implementation	31.12.10 08:00	06.01.11 17:00							
√6.2	unit testing	31.12.10 08:00	05.01.11 16:00							
√6.3	test case/procedure implementation	31.12.10 08:00	05.01.11 17:00							
√7	unit integration and testing	31.12.10 08:00	05.01.11 10:00							
√8	qualification testing	05.01.11 10:00	07.01.11 16:00							
√9	system qualification testing	07.01.11 16:00	13.01.11 11:00							
⊡10	software configuration management	07 01 11 16:00	12 01 11 12:00	•						
		ОК	Cancel	7						
			L							

5. Click on the button **OK**.

Note:

Inserted from the Rillsoft Integration Server-template project should work with the same resource pool as the main project. If there is a resource difference, the message appears.



You should open the project inserted from Rillsoft Integration Server-template separately in Rillsoft Project and switch to the resource pool.

Follow the instructions under **Shift to the resource pool**.

Insert a new subproject in any place in the Gantt chart

- 1. Set the cursor on a field in the Gantt chart where you want to insert a subproject.
- 2. Click the right mouse button and select the item from the context menu **New subproject from Rillsoft Integra**tion Server template.

3. Continue as described above.

Ċ	Paste	Strg+V
	Select all	Strg+A
	New activity	
	New activity from template file	
	New activity from integration server templa	ite
	New subproject	
	New subproject from template file	
	New subproject from integration server ter	nplate

4.12.4 Edit subprojects

In order to edit a parameter of an existing subproject, do as follows:

• In the diagram click on the subproject whose parameter you want to edit.

roperties	Nama: optabligh	ning a pothwara davalanman	t environment				Cada	
General	Preferred team	Shared machine types	Shared machinery	Format	Userfields Notes		Code.	
Due date	Date Time	Project calendar:	•	Project settin	ngs	Color:	•	ОК
Start:	16.02.16 - 11:00	Category:	Priority:	Duration:	1 hour	Use for sub and activition	ordinated subprojects es	Cancel
Finish:	01.03.16 - 11:00	- Not selected - Status:	- 100	Effort:	in hours	× 10 ×		
Set		- Not selected - Baseline:	Ŧ	Enter de	liverable for activity(Example: 150 N	12)		
Cutoff date:	03.02.16 • 00:00		Ŧ	Enter eff	ort for activity(Example: 5 man-hour	s)		

- Activate the required tab in the window Properties and make the changes.
- Click on the button **OK**.

Alternative 1: You may make the changes to the most important subproject parameters directly in the table of the Gantt chart.

Alternative 2: You may use the mouse to shift the subproject in the diagram, so as to change its time parameters or duration.

Requirements: The subproject has fixed start and end dates.

Pro	perties			
	1.3	Name:	system r	equire
	General	Preferred	team	Shar
ſ	Due date —	Date	Time	
	Start:	01.03.16	× 11:00	
	Finish:	09.03.16	× 09:00	
	✓ Set			
1	Cutoff date:	03.02.16	▼ 00:00	

Alternative 3: You can use the context menu of the subproject to make substantial changes to it quickly.

፠	Cut Umschalt+Entf
Ē	Copy Strg+C
• <u>]</u>	Show detail
	Level 1
	Level 2
	Level 3
Į≣	Lowest level
-3	Hide detail
Ť	Hide all
~	Anfangs- und End-Termine von Vorgängen übernehmen
K	Frühestmögliche Anfangstermine setzen
	Spätestmögliche Anfangstermine setzen
••	Verzögerte Vorgänge auf Stichtag verschieben
••	Ressourcenauslastung optimieren

4.12.5 Delete subprojects

In order to delete an existing subproject, do as follows:

- Rightclick on the subproject you want to delete.
- Choose the command **Delete** from the context menu.

Alternatively: You can quickly delete an existing subproject by clicking on the blank space in the diagram with the right mouse button pressed down and striking out the subproject.



4.12.6 Enter subproject properties

In order to define the subproject properties, do as follows:

• Mark the subproject whose properties you want to enter.

The window **Object properties** opens.

Properties			
1.2 Name: establish General Preferred team	ing a software development environment Shared machine types Shared machinery	Format User fields Notes	Code:
Due date Time Start: 16.02.16 ▼ 11:00 Finish: 01.03.16 ▼ 11:00 □ Set □ Cutoff date: 03.02.16 ▼ 00:00	Project calendar: Project calendar * Category: Priority: • Not selected - * 100 Status: - • Not selected - * * Baseline: *	Project settings Time step: 1 hour Duration: in workdays(dependent on project c * Effort: in hours □ Enter deliverable for activity(Example: 150 M?) ☑ Enter effort for activity(Example: 5 man-hours)	Color: Co

- Enter the subproject name in the field Name.
- Enter the subproject code in the field Code.
- Mark the check box **Define** if you don't want to have the **start** and **finish date** of the subproject automatically calculated, but want to define it manually instead.
- Enter the approximately start and finish dates of the subproject in the fields **Start/Finish** after you have marked the check box Define.
- In the drop down list **Project calendar** select the calendar you want to use for the subproject.
- Click on the button **OK**.

Note:

- The field Baseline indicates whether a baseline is being used or not. This feature is defined in the main project.
- The field Time step indicates which interval is being used. This feature is defined in the main project.

4.12.7 Assign activities to subprojects

In order to assign activities to subprojects, do as follows:

- Mark the activity bars you want to move into a subproject.
- Select the menu item Start > Outline > Move in subproject.



The dialogue box Select subproject opens.

R	Select Su	bpr	oject		X
3	Search for:	[
	Nr.	•	Name	Start	Finish
	1		software development pr	03.02.16 00:00	05.04.16 14:00
	1.1		project planning and ove	03.02.16 08:00	16.02.16 11:00
	1.3		system requirements ana	01.03.16 11:00	09.03.16 09:00
	1.6		software implementation	11.03.16 08:00	17.03.16 17:00
ľ					
			ОК	Cancel	

• The activities will then be moved to the subproject and the activity numbering subordinated to the subprojects if the WBS code has been set up accordingly.

4.13 Summary project

4.13.1 Summary project

A summary project contains several projects and allows:

- Cross-project capacity planning
- Optimal resource utilization between several projects
- Simulations

You can group selected projects into a summary project and later add them to a portfolio.

R 🧀 🗔	গ ে 🗆 न	GANTT CH	HART					Summar	y project 1						- 🗆	×
FILE	START PROJEC	FORMA	т													^
Gantt	Network diagram Gantt-network chart	O Time Seffort Cost	Employee	Role	Employee Machine	Resource chart * Cost chart * Gantt chart	* Save	Project	0× 25× 50× 75× 100×	Subproject *	Structure	Show detail * Hide detail *	Filter	▲ Up ▼ Down	Cutoff date	e
chart	rtivity views	Variance analysis	Resour	ne views Ca	nacity views	Additional view	User views	Properties	Schedule	Insert	Out	tline	Edit	. Delete	Scrolling	
					pacity train											
	Cut	off date: 31.10.1	9 00:00		<<					Nove	ember 2019					
Nr.	Name	Duration Start		Finish	Co	43		44	45	46		47		48	. 4	.9
⊟1	Project plan	12.25 21.1	0.19 08:00	06.11.19 10:	00 0				Project p	lanning and o	versight					
1.2	software dev	2.25 21.1	0.19 08:00	23.10.19 10:	00 00	software	developm	ent pl <mark>anni</mark> r	ng							
1.3	system test p	4.75 21.1	0.19 08:00	25.10.19 15:	00 0	, sy	stem test p	lanning								
1.4	software inst	5.63 25.1	0.19 15:00	04.11.19 11:0	0 00	H			software insta	llation plannir	ng					
1.6	software tran	2.81 28.1	0.19 16:00	31.10.19 14:	30 0			softwar	e transition plann	ing						
1.8	following and	1.88 04.1	1.19 11:00	06.11.19 10:0	0 00				following	and updating	g plans					
B 2	Establishin	9 28.1	0.19 08:00	07.11.19 17:	00 0				Estab	lishing a soft	ware develo	opment en	vironment			
2.1	software engi	5 28.1	0.19 08:00	01.11.19 17:0	00 00		4	soft	ware engineering	environment						
22	software test	1.25 28.1	0.19 08:00	29.10.19.10	00 0		SO	ftware test	environment							
2.3	software dev	2.63 28.1	0.19 08:00	30.10.19 14:	00 00			software o	levelopment libra	ry						
2.4	software dev.	4.5 30.1	0.19.14:00	06.11.19.09	0 00		4		software	development	t files					
2.5	non-delivera	1.88 06.1	1 19 09:00	07 11 19 17	00 0				, non-d	leliverable so	ftware					
□ 3	Software sv	7.63 04.1	1.19 08:00	13.11.19 14:	00 0					So	ftware syst	em require	ments analys	is		
- ⊟ 3.1	system req	5.75 04.1	1.19 08:00	11.11.19 15:	00 0					system	requiremen	nts analysis	5			
31	1 analysis of us	2 38 04 1	1 19 08:00	06 11 19 11:0	0 0				analysis	of user input						
3.1.2	2 operational c	3.38 06.1	1.19 11:00	11.11.19.15:0	0 00				+	operatio	onal concep	t				
313	3 system requir	1.88 06 1	1 19 11:00	08 11 19 10 0	00 0				sys	tem requirem	nents					
32	system design	5 25 06 1	1 19 11:00	13 11 19 14	0 0				+	sy	stem desigi	n				
3.3	software reg	3 75 06 1	1 19 11:00	12 11 19 09 0	0 0				+	softw	are requirer	ments anal	ysis			
4																• •
	Bummany project 1													7		
General	Headers and too	ters													OK	
Due da	te Date T	ime 1S	ect calendar tandard 40-h	: our work week 💌		Project settings			Planning typ	e viceto d						4
Start	21.10.19 * 0	18:00 Cat	egory:	P	riority:	Time step: 30 mini	ле		Ope date	oriented					Cance	I
Finish:	13.11.19 + 1	4:00	lot selected -	v	100	Duration: in work	days(depender	nt on project cale	•							
		- N	us: lot selected -		÷	Effort in hour	5		*							
		Bas	eline:			Enter deliverable f	or activity(Exam	ple: 150 M²)								
Cutoff	date: 31.10.19 + 0	00:00			v	 Enter effort for activ 	nty(Example: 5 n	nan-hours)								

Requirement: Only the projects in the summary project may be added, which use a common resource pool.

All views are available for the summary project, from the **gantt chart** to the **resource chart**. In the summary project all activities like be carried out in a usual project, i.e. You can create tasks, allocate resources, correct activities, or save results.

Note: A **new Project** can not be created in the summary project. You should create a new project separately and then add to a summary project.

4.13.2 New Summary project in Rillsoft with interface to Rillsoft Integration Server

In order to open a new summary project, do as follows:

- 1. Select the menu item **File > Open new summary project**.
- 2. The dialogue window Rillsoft Integration Server summary project appears.

🖬 Rillsoft integration server summary project property		×
Name: Summary project 1		
Name select directory	Start	Finish
RootFolder		
2019 🥌		
Project planning and oversight	21.10.19 08:00	06.11.19 10:00
Software system requirements analysis	04.11.19 08:00	13.11.19 14:00
Establishing a software development environment	28.10.19 08:00	07.11.19 17:00
□ somare development process	28.10.19 08:00	27.12.19 12:00
 nignlight individual projects 		
OK Cancel		

3. Select the folder where the required projects are located. Or select individual projects, which are to be transferred into the summary project. Enter a name for the summary project.

Rillsoft integration server summary project	X
New Delete Properties	Cocking
Name Total Availa	○ Optimistic
Summary project 1 3 3	Baselines load Seleci <u>All None</u> Readoni: <u>All None</u>
	Name Tied tog Readonly Locked Last modified Author Code Categ Priori Status Start 🕶 Finish Path
	☑ Project planning Summar □ 31.10.19 08:59 Admin 100 21.10.19 08:00 06.11.19 10:00 Root Folder/2019/Pr
	☑ Establishing a sc Summar □ 31.10.19.09.14 Admin 100 28.10.19.08.00 07.11.19.17.00 Root Folder/2019/Es
	Software system Summar 31.10.19.09:14 Admin 100 04.11.19.08:00 13.11.19.14:00 Root Folder/2019/S
	OK Cancel

4. Click on the button **OK**.

Note: Although you can add to the summary project projects with resources different from the resource pool, but when you open the summary project appears a note, that you should switch these projects with the menu item **Project > Project resources > Switch to Resource pool** to the resource pool.

4.13.3 Open a summary project in Rillsoft with interface to Rillsoft Integration Server

In order to open a summary project, do as follows:

- 1. Select the menu item File > Open > Rillsoft Integration Server > summary project.
- 2. The dialogue Rillsoft Integration Server summary project appears.

Rillsoft integration server sum	mary project													×
New Delete	Properties		Locking Pessimistic											
Name	Total Av	aila	Optimistic											
Summary project 1	3 3		Baselines load	Readon	All None									
			Name	Tied tog	Readonly	Locked	Last modified	Author	Code	Categ	Priori	Status	Start 💌	Finish
			Project planning	Summar			31.10.19 09:27	Admin			100		21.10.19 08:00	06.11.19 10:00
			Establishing a so	Summar		31.10.1	31.10.19 09:14	Admin			100		28.10.19 08:00	07.11.19 17:00
			Software system	Summar			31.10.19 09:14	Admin			100		04.11.19 08:00	13.11.19 14:00
			•											•
					ОК		Cancel							

- 3. Left, all summary projects are listed with information about project number in the summary project and number of projects that are available for you, it is related to your access rights.
- 4. Right, you see all the projects from the selected summary project. You can take out individual projects from the summary project for this time by deleting the marking of appropriate projects or all projects by click **Select: All**.

New Delete	Prope	erties	Locking Pessimistic											
ame	Total	Availa	Optimistic											
ummary project 1	3	3	Baselines bad			/	none							
			Select All None	Readon	All None									
			Name	Tied tog	Readonly	Locked	Last modified	Author	Code	Categ	Priori	Status	Start 💌	Finish
			Project planning	Summar			31.10.19 09:27	Admin			100		21.10.19 08:00	06.11.19 10:0
			Establishing a so	Summar		31.10.1	31.10.19 09:14	Admin			100		28.10.19 08:00	07.11.19 17:0
			🚽 Software system	Summar			5.10.19 09:14	Admin			100		04.11.19 08:00	13.11.19 14:0
					1									
		select						akad						
							1	okeu						
				re	ad only									
			4											

5. You can apply some projects read-only i.e. only to read in the summary project, by selecting them in **Read-Only** column or all projects by click **Readonly: All**.

You can see at once on a red background if any projects are locked as well.

6. Click on the button **OK**.

Note: Only projects that share a common resource pool can be included in the summary project.

If project resources are differrent from the resource pool, the message appears.

Rillso	oft Project
	Following projects cannot be shown in a portfolio as their resources differ from the resource pool in project.
-	Initiation
	Individually open project by using the menu item 'Project/Switch to Resource Pool' can be switched to the resource pool.
	<u></u> ΩK

In order to have the summary project accepted projects with significant differences in resources, they must be opened separately and you can switch from the project resource to the resource pool by means of the menu item **Project > Switch > Resource pool**.

Locking

- Pessimistic once a user edits something in the project, all other users can open the project only as a read-only copy.
- Optimistic each user can always edit the project.

The lock option is available only for the user, who also have the appropriate access rights.

Baselines load

Baseline slows the work with the summary project. If you do not need a comparison with a baseline at the moment, you can open summary project without a baseline.

Set the order of the project in summary project

The projects shown in the list can be sorted according to the following parameters:

- Project name
- Code
- Category
- Priority
- Status
- Start of project
- Finish of project
- File names

Click on the selected column in the title area, e.g. Start.

Baselines load													
Selec' <u>All None</u> Readon!: <u>All None</u>													
Name	Tied together	Readonly	Locked	Last modified	Author	Code	Categ	Priori	Status	Start 🔻	Finish	Path	
Project planning and ov	Summary project			31.10.19 09:27	Admin			100		21.10.19 08:00	06.11.19 10:00	Root Folder/2019/Pr	
Establishing a software	Summary project			31.10.19 09:14	Admin			100		28.10.19 08:00	07.11.19 17:00	Root Folder/2019/Es	
Software system require	Summary project			31.10.19 09:14	Admin			100		04.11.19 08:00	13.11.19 14:00	Root Folder/2019/S	

The selected order is then accepted by the summary project.

Change summary project properties

Click on the button **Properties**

Rillsoft integration server summary project	t 2														×
New Delete Propert	ies	 Locking Pessimistic 													
Name	Total Availa.	. Optimistic													
Summary project 1	3 3	Baselines load Selec <u>All None</u>	Readonl <u>: All None</u>												
1		Name	Tied together	Readonly	Locked	Last modified	Author	Code	Categ	Priori	Status	Start	*	Finish	Path
		Project planning a	and ov Summary project			31.10.19 09:27	Admin			100		21.10.19 08	:00	06.11.19 10:00	Root Folde
		Establishing a so	ftware Summary project			31.10.19 09:14	Admin			100		28.10.19 08	:00	07.11.19 17:00	Root Folde
		Software system	require Summary project			31.10.19 09:14	Admin			100		04.11.19 08	:00	13.11.19 14:00	Root Folde
		_													
		_													
•)	•													•
					OK	Ca	ancel								

If you want to add other projects to the list, click on the appropriate button to add either a folder or file.

4.13.4 Reload summary project

If you are working in a multi-user environment, it may often be necessary to reload a summary project on which several people are working at the same time in order to view their changes.

This function reloads the current summary project.

• Click on the Reload icon on the Quick Access Toolbar.



Notes:

• If the Reload icon is not present, you can select Reload from the Customise Quick Access Toolbar menu item.

R 🖬 🧀	¢ 🖯 🔈	¢ 🗆 🚬		GANTT CHART								
FILE	START	PRO E	Ŧ	FORMAT								
	•	Time	Cus	Customize Quick Access Toolbar								
		Effort	~	New	2							
Gantt chart		Cost		New project fro	m template							
Activity	views Varian	ce analysis	~	Open								
4	1	Cute ff d		Open portfolio								
		Cutorra	a 🗸	Reload 룾 🗖								
Nr.	Name	Effort	~	Save								
⊞ 1	ilding plann	ing 1496		Save as								
± 2	Origon plan	n 1608	~	Undo: Hide Det	ail							
± 3	Katomo pla	n 1432	~	Redo:								
*			_	More Command								
				More Command	D							
				Show Below the	Ribbon							
				Minimize the Ri	bbon							

4.13.5 Form a summary project from a split project

You can automatically convert an existing project, which consists of several sub-projects and is to be processed by different teams, into a summary project in Rillsoft Project with an interface to the Rillsoft Integration Server.

In order to convert a project into a summary project, the following **Prerequisites** should first be fulfilled:

- 1. there should be at least one sub-project in the project.
- 2. there should be no separate activities at the top project level, i.e. all activities should be subordinate to some subproject.
- 3. there should be no added documents at the top project level.

If the above requirements are not met, the function **Project > Rillsoft Integration Server > Split Project** is greyed out.

To create a summary project, please proceed as follows:

- 1. open a project that you want to convert to a summary project.
- 2. check whether the project has been converted to a summary project.
- 3. If it does, select the menu item Project > Rillsoft Integration Server > Split Project.

R 🗀	Ø 🖬 👂	¢ 🗆 "	GANTT CH	IART			Building planning		-	-	×
FILE	START	PROJEC	FORMA	r							^
1	Earliest st	tart date	Employee *	ta Add		🖅 Resource pool	🖏 Save on workplace	🚓 Split project	* 2	Cross-project links	
	🕨 Latest sta	art date	Machine *	🖕 Select		🖅 Project resources	Copy from workplace	Archive summary project	A	Project/Portfolio documents	
over	Other function	ons *	📱 Split activity	🏊 Delete	Resource	S					
	Schedule		Assistant	Baseline	Pr	roject resources	Project settings	Rillsoft	integra	ation server	

4. In the dialogue window, Rillsoft Project shows us in the **Name** column how many separate projects the project can be divided into.

ToDo RIS Projekt in Sammelprojekt umwandelt			×
Name: Building planning			
Name	Path	Subdirectory	
Phase 1	Root Folder / 2023 / Team / 1	Building planning - Phase 1	
Phase 2		Building planning - Phase 2	
Phase 3		Building planning - Phase 3	
	÷		
	OK Cancel		Help

5. In the Path column, click three dots and select a directory from the virtual directory structure for each project.

Rillsoft integration server select directory												×
New Folder Delete Folder]											
New Folder Root Folder 2016 Complete 2011 test Construction 2021 Construction 1 2023 2 2 2 2 2 2 2 2 2 2 2 2	Name	▼ Rea	Locked	Last modified	Author	Code	Customer	Category	Priority	Status	Start	Finish
	•											4
				ОК	Cancel							Help

- 6. The corresponding subdirectories for the projects are listed in the Subdirectory column.
- 7. By clicking the **OK** button, the original sub-projects are saved as projects and added to a summary project.

A corresponding message appears and after you click **OK**, the newly created summary project is opened. Although it looks similar to the initial project, it is not, as a summary project enables multi-user work.

4.13.6 Summary project archiving in Rillsoft with interface to the Rillsoft Integration Server

Several separate projects belonging to the summary project are merged into one project.

To archive a summary project, please proceed as follows:

1. select the menu item Project > Rillsoft Integration Server > Archive summary project.

R 🧀	Ø 🖯 🤊 ¢ 🗔 "	GANTT CHA	RT		Construction	+	-	×
FILE	START PROJEC	FORMAT						^
1	Earliest start date	Employee 👻	늘 Add	Resource pool	🖏 Save on workplace	💥 Split project 🛛 🗸	📲 🔲 Cross-project links	
	Latest start date	Machine +	🖕 Select	Project resources	* Copy from workplace	🔆 Archive summary project	A _■ Project/Portfolio documents	
over	Other functions 🔹	Split activity	峯 Delete	Resources				
	Schedule	Assistant	Baseline	Project resources	Project settings	Rillsoft	integration server	

2. The dialogue Save Rillsoft Integration Server Project appears.



- 3. On the left, all virtual directories are listed. On the right you see all projects from the selected directory.
- 4. Click the OK button.

4.13.7 Cross-project links in summary project

In the summary project you can link several projects with each other. **Important!** This function is only included in Rillsoft Project with **Rillsoft Integration Server** and links can only be edited in the summary project.

In cross-project links, succeeding activities are shifted not automatically, but the program sets negative intervals instead. By means of the menu item **Project > Rillsoft Integration Server > Cross-project links**, you can check these links and obtain detailed information about them, such as occurring delays.

You can choose whether you want to accept only single or all of the changes you have made to these settings.

love	Outbound project / Activity	Incoming project / Activity	Start 💌	Finish	Reserve	Delay, rel	Delay, cal.
	Project planning and oversight/1.8 following and upda	Establishing a software dev	06.11.19 10:00	28.10.19 08:00	-9.08	-9.08	-9.0
	Establishing a software development environment/2.5	Software system requireme	07.11.19 17:00	04.11.19 08:00	-3.38	-3.38	-3.3
	3						

The following information and options are available:

Move	The calculated delay will be compensated by the approved delay when you click on the check box.
Outgoing project / ac- tivity	Displays outgoing projects/activities.
Incoming project / ac- tivity	Displays incoming projects/activities.
Start	Shows, where a link starts.
Finish	Shows, where a link ends.
Reserve	Shows the interval between the outgoing and incoming positions in absolute time.
Delay, Release	Displays the value of the released interval.
Delay, Calculation	Displays the value of the calculated interval.

Red background colouring signals that there is a discrepancy between the released and the calculated delay.

Set to automatic

Click this button if all calculated delays should be automatically aligned with the released delays.

Types of links

The following link types are at your disposal:

Finish-Startthe "from" activity must finish before the "to" activity can startStart-Startthe "from" activity must start before the "to" activity can startFinish-Finishthe "from" activity must finish before the "to" activity can finishStart-Finishthe "from" activity must start before the "to" activity can finish

Properties		
3		
Link		
Predecessor:	2 task 4	ОК
Successor:	3 project end	Cancel
Link type:	Finish to start *	
Delay:	Absolute time	Delete
Color:	Activity color 👻 🖌 Bold highlighted	
Delay: Color:	Absolute time	Delete

Time intervals

Intervals can be defined in Project properties in relation to the time unit of the duration (such as hours or days). Intervals can only be defined in absolute time (estimated duration including non-working time, such as: 10 hours or 2 days).

Intervals can have

- positive (such as: + 2 hours) or
- negative (such as: -50% = overlapping)

signs.

Highlight link

Links can be highlighted by means of colour or boldface.

Create cross-project link

New cross-project links can be only created by Rillsoft Project with Rillsoft Integration Server in the summary project. In order to create a new cross-project link, do as follows:

• Choose the link type via the menu item Start > Insert > Link.



- Connect two activities by drawing your mouse from one activity of a project to another activity from another project.
- If necessary, enter the delay (positive or negative) by which you want to delay the "to" acticity depending on the selected link type.

Note: If you do not enter any delay, the delay related to positions of outgoing and incoming activities is automatically calculated.

• Click on the button **OK**.

4.14 Take over start and finish dates of a project from activities

Rillsoft Project allows you to define the start and finish dates of a project during the setup of this project.

Pro	operties			
	1.2	Name:	establish	ing a :
	General	Preferred	team	Sha
1	Due date —	Date	Time	
	Start:	16.02.16	▼ 11:00	
3	Finish:	01.03.16	▼ 11:00	
1	🗌 Set			
	Cutoff date:	03.02.16	▼ 00:00	

A project's duration is usually set by default for two weeks.

You may use the menu item **Project > Schedule > Take over** to recalculate project dates in relation to a start date of the first activity and the finish date of the last activity.



4.15 Improve presentation of the project

In order to improve the project readability, do as follows:

- Show / hide all subprojects
- · Number all activities and subprojects
- Change order in the Gantt charts
- · Adjust timescale and calendar pane

- Scale up/down display
- Create subprojects
- Add user view

Show / hide detail

In order to unfold all subprojects, select the menu item Start > Outline > Show/Hide detail.

Ξ	* <u>]</u> s	Show detail 👻	
	-3 H	Hide detail 👻	
- Structure	-]	Hide detail	ł
	Ī≡	Hide all	Ľ

Number all activities and subprojects

To each activity is automatically assigned a number during the activities creation After their linking or the schedule correction, the numbers may not correspond to the correct time series.

In order to rearrange the numbers of activities - no matter whether it is a unique number or WBS code - , select the menu item **Project / Numbering**. The activities will then be numbered automatically and unbrokenly.



Change order in the Gantt charts

In order to automatically change the order of all activities and subprojects, select the menu item **Gantt chart format** > **Data** > **Sort** an



select one of the following menu items or icon buttons:

- by links
- by start time
- by code
- by name

Note: Different views can have different menu items.

Manually change

In order to change automatically the order of a single marked activity or subproject

1. select the menu item **Start > Edit >...** an.



- 2. select one of the following menu items or icon buttons:
- up
- down

Adjust timescale and calendar pane

To display the project's time, you can choose between minutes and quarters.

To adjust the timescale, you can select one of two options:

• Click the slide bar with the left mouse button on the right pane of the status bar and move the slider to the preferred time-zoom setting.



• Click on the actual time display e.g. Week 1:2 with the left mouse button on the right pane of the status bar. Then select other preferred representation from the list.



Scale up/down display

When displaying the project, you can enlarge or reduce the project views.

Please click with the left mouse button in the right-hand area of the status bar on the current scale display, e.g. 120%. Then select select other preferred representation from the list.



4.16 Optimize a project

The purpose of project optimisation is to obtain a project schedule that meets a predefined finish date and which makes optimal resources utilization.

In order to optimize a project, go to the menu item **Project > Schedule > Other functions > Optimize resource utilization**.



Note:

• You can use the check box **Fix** in the window Activity properties (tab **General**, field **Due date**) to ensure that the due date of the activity remains unchanged during optimisation.

Pro	operties		
	1	Name:	project plan
	General	Preferred	team S
ſ	Due date —	Data	Time
		Date	Time
	Start:	07.11.16	▼ 08:00
	Finish:	28.11.16	* 11:00
	☑ Set		
	Cutoff date:	07.11.16	• 08:00

- The optimisation process takes the fixed dates of the subprojects into account.
- The command **Optimize resource utilization** in the context menu of the subproject can be used to optimize selected subprojects only.

፠	Cut Umschalt+Entf
Ē	Copy Strg+C
+ 3	Show detail
	Level 1
	Level 2
	Level 3
↓ ≣	Lowest level
-3	Hide detail
Ì≡	Hide all
\checkmark	Take over
K	Earliest start date
	Latest start date
••	Move delayed activities to cutoff day
•	Optimize resource utilization

• The optimisation of personnel resources is done according to the following command structure: employee -> teams -> roles (explanation: if it includes employees, teams or roles will be ignored in the optimisation).

Contingency reserve

The display of the contingency reserve provides an overview about the erliest possible start dates and latest possible finish dates of activities and subprojects in the Gantt chart in case of changes in the project schedule.

In order to activate the view of the contingency reserve, do as follows:

- Select the menu item File > Options > General > Exended.
- Mark the check box **Reserve time calculation**.

Extended		
Show help	Auto restore:	5 ‡ min.
Cutoff day move to current date	Currency:	€
✓ Label resource chart	Undo depth:	100 🌲
Represent weekend	Activity are critical, if buffer less than or equal:	0 h.
Represent nonworking days	Read-only projects in the portfol	lio of grey
Calculation of reserve time		

• Select the menu item Gantt chart format > Show > Contingency reserve.

🛐 🗀 🔒 🏷 🗢 📷 »	GANTT CHART		new_software development process
FILE START PROJECT	FORMAT		
Columns Sort Renumber Excel	Toom in	Role Custom fields Teams ✓ Notes & links Employee Other Tooltips ▼	 Project start

4.17 Save project

In order to save a project, select the menu item **File > Save or File > Save as**.

Options		×
General	General	
Display	Rillsoft-Desian: White	
Extended		
Customize Ribbon	Default location	
Quick Access Toolbar	Projects: C:\ProgramData\Rillsoft Project 6.1\Projects	
	Portfolios: C:\ProgramData\Rillsoft Project 6.1\Portfolios	
	Templates: C:\ProgramData\Rillsoft Project 6.1\Templates	
	Reports: C:\ProgramData\Rillsoft Project 6.1\Reports	

• You can create a folder for your templates by clicking on File > Option > General > Default location in the field **Project**.

Rillsoft with interface for the Rillsoft Integration Server

In order to save a project, select the menu item File > Save or Save as > Rillsoft Integration Server > Project.

Save to other formats



Alternatively, you can save projects in other formats:

- 1. in **MS Project** via XML
 - in XML format for Web

Clicking on **File > Export > ...** and mark as **File type** the appropriate format.

2. • MS Excel

Select the menu item View format > Data > Excel, for example Gantt chat format > Data > Excel

4.18 Save project as template

In order to save a project **as template**, select the menu item **File > Save as template**.

Note:

• We recommend you to remove all employees from the project by clicking on **Project > Assistant > Employees > Remove employees from activities**.

Options		×
General	General	
Display	Rillsoft-Design: White	
Extended	THICK COURT	
Customize Ribbon	Default location	
Quick Access Toolbar	Projects: C:\ProgramData\Rillsoft Project 6.1\Projects	
	Portfolios: C:\ProgramData\Rillsoft Project 6.1\Portfolios	
	Templates: C:\ProgramData\Rillsoft Project 6.1\Templates	
-	Reports: C:\ProgramData\Rillsoft Project 6.1\Reports	

• You can create a folder for your templates by selecting the menu **File > Option > General > Default location** in the field **Templates**.

4.19 Import of projects

4.19.1 Import

In order to import a project, select the menu item **File > Import**.

\bigotimes	
New	Import
Open	MS Project XML Import a project from MS Project in Rillsoft project via XML format.
Last used	The imported project should be saved before in MS project as xml file.
Save	Import a project from text file into CSV format in Rillsoft project. This way you can save your Excel documents as Rillsoft projects.
Save as	The second secon
Resource pool	
Print	
Import	
Export	
Info	
Options	

- MS Project XML allows to import from MS Projects that used to be saved as XML files.
- **Text file in CSV format** allows to import simple scheduling data, such as project structure, name, start and end dates by means of CSV Standard.
- XML for web allows to import XML files that used to be saved via the menu item File > Export.

4.19.2 Import from MS Project XML

In order to import from MS Project XML, do as follows:

- 1. Save a project as XML file by means of MS Project by selecting in the MS Project software the menu item **File** > **Save as** and setting the file type in the appearing dialogue **File type** to **XML format** (*.**xml**).
- 2. In Rillsoft Project select the menu item **File > Import > MS Project XML** and select the required file. Resources from the imported MS Project will be displayed and you should assign these different resource types in Rillsoft Project.

r.	Name	Code	Costs	Role	Team	Employee	Machine types	Machinery	Mark All as:
9	Volunteer Team		0.00	0	۲	0	0	0	Roles
10	Chairperson		0.00	0	0	۲	0	0	
11	Board of Directors		0.00	۲	0	0	0	0	Teams
12	Auction Manager		0.00	۲	0	0	0	0	
13	Wine Tasting Manager		0.00	۲	0	0	0	0	Employees
14	Publicity Manager		0.00	۲	0	0	0	0	
15	Caterer		0.00	۲	0	0	0	0	Machine types
16	Music		0.00	۲	0	0	0	0	M 11
17	Wine Vendor		0.00	۲	0	0	0	0	Machine
18	Printer		0.00	۲	0	0	0	0	
19	Auctioneer		0.00	۲	0	0	0	0	OK
20	Techie		0.00	۲	0	0	0	0	

3. Define each of the resources according to your requirements, this could be role, team, employee, machine type, machinery, by marking the corresponding check box in the column of the table.

Mark all as:

If you want to mark all resources at a time, click on the appropriate button.

- If you want to mark all resources at a time, click on the appropriate button.
- Role all resources are assigned as roles.
- Team all resources are assigned as teams.
- Employee all resources are assigned as employees.
- Machine type all resources are assigned as machine types.
- Machinery all resources are assigned as machinery.
- 4. Click on the button **OK**.

4.19.3 Import text file CSV format

When importing from a text file Rillsoft project offers two Variants:

- 1. To determine a structure plan from WBS code, you define a column for WBS code in text file. That is, each row contains an operation name.
- 2. Breakdown structure should be determined by grouping several text columns. You can capture several operations per one row.

You can import from the text file:

- · the project structure
- · name of tasks
- · their start dates and finish dates
- user fields (up to 20)

Sample of a text file:

Version 1 (breakdown structure is determined via WBS code):

```
WBS;Name;Start;Finish;Duration, hrs.;Effort, EH;Costs, €
1;Subproject1;25.08.2015 08:00;05.09.2015 17:00;80,00;200,00;10741,20
1.1;Task1;25.08.2015 08:00;29.08.2015 17:00;40,00;40,00;1520,00
1.2;Task2;28.08.2015 08:00;03.09.2015 17:00;40,00;80,00;3040,00
```

Version 2 (breakdown structure is determined by grouping several text columns):

```
Filiale;Services and miscellaneous;Pay compensation;24.01.2011 08:00;28.01.2011 16:00;

→Task 1

Filiale;Services and miscellaneous;Pay compensation;24.01.2011 16:00;01.02.2011 15:00;

→Task 2

Filiale;Services and miscellaneous;Pay compensation;28.01.2011 08:00;04.02.2011 17:00;

→Task 3

Filiale;Services and miscellaneous;Reimbursement claim;24.01.2011 16:00;01.02.2011 15:00;

→Task 7

Filiale;Services and miscellaneous;Pflegeversicherung;31.01.2011 08:00;04.02.2011 17:00;

→Task 9

Filiale;Services and miscellaneous;Long-term care insurance;31.01.2011 08:00;04.02.2011.

→17:00;Task 10

Filiale;Sales;Candidate declarations;28.01.2011 08:00;04.02.2011 17:00;Task 13

Service Center client;Employer service;;31.01.2011 08:00;04.02.2011 17:00;Task 16

;;;24.01.2011 16:00;01.02.2011 15:00;Task 18
```

In order to import a text file as CSV file, do as follows:

Step 1:

Select the menu item **File > Import > Text file in CSV format**.

	- Level					
eparator for C	olumns:					
ate and time f	format: DD.MM.YY h	h:mm 🔔	.			
Charles and		WDC and a		(i		
Structure pla	an is to be determined about	wbs code (a	utiple text plumps (ex	nine) n ha multipla pativitica pr	or line)	
) Structure pr	an is to be determined about	l grouping of fr	ultiple text conjunts (car	n be multiple activities pe	er inne)	
Nr.	Name	Effort	Duration	Start	Finish	
	project planning	279	13.38	25.11.10 08:00	14.12.10 11:00	
.1	software develop	54	2.25	25.11.10 08:00	29.11.10 10:00	
.2	system test planni	76	4.75	25.11.10 08:00	01.12.10 15:00	
.3	software installati	90	5.63	01.12.10 15:00	10.12.10 12:00	
.5	software transitio	44	2.88	06.12.10 08:00	08.12.10 16:00	
.7	following and upd	15	1.88	10.12.10 13:00	14.12.10 11:00	
2	establishing a sof	288	9	14.12.10 11:00	27.12.10 11:00	
2.1	software enginee	160	5	14.12.10 11:00	21.12.10 11:00	
2.2	software test envi	20	1.25	14.12.10 11:00	15.12.10 14:00	
2.3	software develop	42	2.63	14.12.10 11:00	16.12.10 17:00	
2.4	software develop	36	4.5	17.12.10 08:00	23.12.10 12:00	
2.5	non-deliverable s	30	1.88	23.12.10 13:00	27.12.10 11:00	
3	system requireme	141	5.75	27.12.10 11:00	04.01.11 09:00	
3.1	analysis of user in	57	2.38	27.12.10 11:00	29.12.10 15:00	-

- Activate the check box First row contains only headers, do not import if the first row should not be imported.
- In the drop down menu Separator for columns, select the separator you want to use to separate the individual elements from each other.
- In the drop down menu Date and time format, select the format you want to use for the display of date and time format in the text file.
- Select how should a structure plan be determined, that is, Variant 1 or Variant 2.
- The table lists information that can be accepted in the project.
- Click on the button Continue.

Step 2:

Columns	First line	Second line	Mapping		
Nr.	1	1.1	WBS		
Name	project planning and oversight	software development planning	Name		
Effort	279	54	User field 1		
Duration	13.38	2.25	User field 2		
Start	25.11.10 08:00	25.11.10 08:00	Start		
Finish	14.12.10 11:00	29.11.10 10:00	Finish	-	
			- unassigned -		
			WBS		
			Name		
			Start		
			Finish	-	

• In the column Assignation, select a matching name for the specific property of a product from the drop down menu.

Normally, the names are connected to the values in the column Columns.

• Click on the Finish button.

4.20 Export of projects

4.20.1 Export

In order to export a project, select the menu item **File > Export**.



- MS Project XML allows you to export to MS Project per XML format.
- XML for Web allows you to export to XML files.

Export via selecting the menu item View > View format> Data > Excel

• MS Excel allows you to export to Excel files.

In Rillsoft project with interface to the Rillsoft Integration Server you can create different calendars via Add-Ons > iCalendar >...:

• MS Outlook allows you to export to MS Outlook via iCalendar format.

4.20.2 MS Project XML

In order to export a project,

- 1. In Rillsoft Project
 - select the menu item File > Export > MS Project XML
 - Enter a name for the Rillsoft xml file
 - Click on the button **Save**
- 2. In MS Project

😰 Öffnen	00.5	2 · C · L · · · · · · · · · · · · · · · ·		×
Organisieren Veuer Ordner	. KP 5.	J ▶ Samples ▶ n_projekte ▶ 2015	▼	suchen >
 test_ressourcenpool xml bsp_neubau ddrucken ddrucken derror excel fragen fragen Help Intel Kalender_BL Mdeien n n_projekte 2014 2015 Gebäudeplanung 	E	Name	Änderungsdatum 07.06.2015 14:07 07.06.2015 14:04 07.06.2015 16:06 15.01.2015 11:33 07.06.2015 16:04 07.06.2015 16:03 15.01.2015 11:41 15.01.2015 11:44 15.01.2015 09:14 11.05.2015 11:27 15.01.2015 10:33 15.01.2015 11:24 11.05.2015 11:37	Typ XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument XML-Dokument
Dateiname: ABC_rp.xml		Too	 ▼ XML-Format Is ▼ Öffnen 	(*.xml)

• select the menu item **Open** and select File type as **XML format** (*.xml).

- Select your Rillsoft xml file and then click on **Open**.
- Stay with the option **As a new project** and click **Ok**.

Import-Assistent - Importmodus	x
Wie möchten Sie diese Datei importieren? Als ein <u>n</u>eues Projekt Daten an das aktive Projekt <u>a</u>nfügen Daten <u>m</u>it dem aktiven Projekt zusammenführen 	
<u>H</u> ilfe < <u>Z</u> urück <u>W</u> eiter > <u>E</u> nde Abbre	chen

4.20.3 Export to MS Excel

You can export the following views to the Excel:

- Activity views
 - Gantt chart
- Resource views
 - Employee
 - Role
 - Team
 - Machine types
 - Machine
 - Material requirements
- Capacity views
 - Employee
 - Machine

Tip By means of a filter you can define the exported information concerning time and resources.

x≣		5 -	¢∓							en	nployee_	portfolio	o.xls [Korr	npatibilit	ätsmodu	s] - Excel	
DA	TEI	STAR	T EINFÜGEN SEITENLA	YOUT FORM	AELN DA	TEN ÜBERP	RÜFEN	ANS	ICHT								
	N 3	🖌 Ausso	hneiden Arial	- 10 - A	• _A • = =	- %-	😽 Ze	ilenumb	ruch		Standa	rd	-				
F:		🖹 Kopie	eren 🔻				_							D		AI- T-1	,
EINT	ugen	Form	at übertragen F K U -	🖽 🔹 🙅 🕶		: = (= +=	🗄 Ve	rbinden	und zentr	ieren 🔻	- 1	% 000	,00 →00 ,00 →00	Eormatierung z form		AIS Tab	elle Zelle
	Zwischenablage		briftart	_		ucrichtuu			_		7.561	_	Formatieren			tuarlagon	
	Zwischenablage		age an so	mitart	Cart.		usiiciicui	iig		1.0		Zaili	1.0			Tornia	wonagen
T3	2	Ψ.	$\times \checkmark f_x$														
	A	A	В	С	D	E	F	G	Н	1	J	K	L	Μ	N	0	P
	Nr.		Name	Duration	Effort	Total cost	16	16	16	16	16	16	16	16	16	16	16
1							week 04 25.01.20	week 05 01.02.20	week 06 08.02.20	week 07 15.02.201	week 08 22.02.20	week 09 29.02.20	week 10 07.03.201	week 11 14.03.201	week 12 21.03.20	week 13 28.03.20	week 14 04.04.201
2	_			AT	Ph	€											
3	1		software development pro	5,25	94,00	4190,00	90	4									
4	2		Project1	8,50	169,00	7160,00	28	120	21								
5	11.0	001	programmer - C++	5,00	40,00	2000,00		40									
6	11.0	002	programmer - PHP	8,00	64,00	2560,00	12	40	12								
-	11.0	003	programmer - V.Basic	8,13	65,00	2600,00	16	40	9								
8	1	3.02	lidy, John	8,13	65,00	2600,00	16	40	9								
9	5		lask 4	0,13	1000.00	2600,00	20	40	60	107	06	146	105	201	0.4	21	
11	о 11 (01	new_soltware developme	40,25	294.00	40040,00	30	42	28	50	23	36	40	201	25	21	
12	1	3.01	Tidy John	15 63	125.00	5000.00			20	50	12	18	16	33	25	21	
13	3	2.6	non-deliverable software	1.88	15.00	600.00					12	3	10	- 55	23	21	
14	3	3.3	system requirements	1,88	15,00	600,00						15					
15	3	71	software implementation	5 00	40.00	1600.00							16	24			
16	3	.11	software configuration mana	2.63	21.00	840.00								9	12		
17	3	.12	software product evaluation	4.25	34.00	1360.00								-	13	21	
18	1	8.01	Slow	2.63	21.00	1050.00				21							
19	1	9.01	Fast	18,50	148,00	7400,00		17	28	29	11	18	24	21			
20	11.0)02	programmer - PHP	7,13	76,00	3040,00				37	39						
21	2	1.01	Consider	7,13	76,00	3040,00				37	39						
22	3	.2.1	software engineering environ	5,00	40,00	1600,00				29	11						
23	3	.2.5	software development files	4,50	36,00	1440,00				8	28						
24	11.0	003	programmer - V.Basic	18,25	182,00	7280,00			4	50	11	18	44	43	12		
25	1	3.02	Tidy, John	1,25	10,00	400,00				10							
26	1	4.01	Diligent	8,25	66,00	2640,00				29	11		16	10			
27	2	1.02	Consider	13,25	106,00	4240,00			4	11		18	28	33	12		
28	13.0	001	manager	2,25	18,00	900,00	18										
29	14.0	001	designer	21,25	170,00	8500,00	18	8	15	29	11	37	24	9	19		
30	15.0	001	analyst	23,63	245,00	10470,00		17	15	31	12	55	41	55	19		
31	16.0	001	support	9,38	/5,00	3000,00							16	40	19		400
32	5		2016_2_soft	9,00	184,00	8800,00										48	136
33																	

How it looks in Rillsoft Project

R 🗀 层	5 c 🗆 🖬	EMPLOYEE USA	GE								20	016 portf	olio									
FILE	START PROJECT	FORMAT																				
Gantt chart	Network diagram Gantt-network chart	© Time ♣♣ Effort ♣़ Cost	Employee	Rol	e ≜itE m ∰itN	nployee lachine	Jl R ∧ C	esource chart 👻 ost chart 🝷 antt chart	* Save I Manage	Project	0× 25× 50× 75	52 100×	tan A t−i s tas Li	ctivity = ubproject = ink =	Structure	+∃ Show -∃ Hide ≧ In su	v detail 👻 detail 👻 bproject 👻	▼ Filte ▼ Clea	r r filters 🔻 ch	▲ Up ▼ Down ♦ Delete	▼ Cut Cur ▼ Proj	off date ent date ect start •
A	tivity views	Variance analysis	Resou	urce view	s Capac	ity views	Ad	ditional view	User views	Properties	Schedule			Insert		Outline			Edit		Scr	olling
																		1				
	Cutoff	date: 11.01.17 14:0	0		<<				Feb	ruary 2016					Marc	h 2016						April 2016
						-	04	05	06	07	08	(19	10		11	12		13	14		15
Nr.	Name		Dur	Effort	Total cost		54	166	83	197	96	1	46	165		201	94		69	136		
⊞ 1	software developm	nent process	5.25	94	4 190.00		90	4														
E 2	Project1		8.5	169	7 160.00		28	<u>120</u>	<u>21</u>													
	programmer - C++		5	40	2 000.00			<u>40</u>														
	programmer - PHF	, ,	8	64	2 560.00		12	40	12													
11.003	programmer - V.Ba	isic	8.13	65	2 600.00		16	<u>40</u>	<u>9</u>													
⊟ 13.	12 Tidy, John		8.13	65	2 600.00		<u>16</u>	<u>40</u>	9													
2.2	task 4		8.13	65	2 600.00				task 4													
∃ 3	new_software dev	elopment proc	40.25	1060	46 640.00		36	42	62	197	96	1	46	165		201	94		21			
⊟ 11.00 ⁺	programmer - C++		30.5	294	13 450.00			17	28	50	23	3	6	40		54	25		21			
⊟ 13.	11 Tidy, John		15.63	125	5 000.00						12	1	8	16		33	25		21			
3.2	6 non-deliverable so	ftware	1.88	15	600.00							I non-	delive	rable softwa	ire							
3.3	3 system requireme	nts	1.88	15	600.00								S	ystem requi	rements							
3.7	1 software implement	ntation	5	40	1 600.00											sonwa	ire implem	entation				
3.1	software configura	tion managem	2.63	21	840.00												SOIL	vare con	nguration	managem	ent	
3.1	software product e	valuation	4.25	34	1 360.00														SOIL	ware prod	ICT evalu	ation
⊞ 18.	11 Slow		2.63	21	1 050.00					21												
	11 Fast		18.5	148	7 400.00			17	28	29	11	1	8	24		21						
11.002	programmer - PHF	2	7.13	76	3 040.00					37	39											
⊡ 21.	11 Consider		7.13	76	3 040.00					37	39											
3.2	1 software engineer	ing environment	5	40	1 600.00						software	enginee	ring e	nvironment								
3.2	5 software developm	nent files	4.5	36	1 440.00						Softw	are dev	еюрп	ient mes								
⊟ 11.003	programmer - V.Ba	isic	18.25	182	7 280.00				4	50	11	1	8	44		43	12					
	12 Tidy, John		1.25	10	400.00					10												
⊞ 14.	11 Diligent		8.25	66	2 640.00					29	11			16		10						
€ 21.	2 Consider		13.25	106	4 240.00				4	11		1	8	28		33	12					
4 12 00	managar		3.05	10	000.00		10															

1. Click one of the views that you want to export to Excel. For example Start > Resource views > Employee



2. Structure the project information by setting **Start > Outline > Structure >...** For example **Project > Role > Employee**



Then appears a note about the structure selection in the status bar.

STRUCTURE: Role > Employee

3. Define the time scale. For example Week 1:2



4. If necessary, you can display more details by clicking**+**.

R 🧀 🗔	5 ∂ ∓	EMPLOY	'EE U	SAGE				
FILE	START PROJECT	FOR						
Gantt chart	Variance analysis Network diagram Gantt-network chart ctivity views	Employee Resourc	Oth ce vie	Role Feam er 🔻 ws	4 * Ca			
Cutoff date: 06.12.10 08:00								
Nr.	Name			Eff	ort			
∃ 11.001	programmer - C++			2	45			
	programmer - PHP		40					
⊡ 11.003	programmer - V.Basi	ic		1	42			
± 19.02	Fast				10			
±21.02			1	32				
± 14.001	designer			1	68			
	analyst			2	36			
	support				75			

5. Check which columns are to be exported clicking the menu item **Resource view format > Data > Columns** and switch on/off the required columns.



6. Click **Resource view format > Data > Excel** and enter a name for the Excel file.



4.20.4 Export to MS Outlook

You can export the following information of the project to the MS Outlook via iCalendar:

- user task
- portfolio task
- project task

Requirements:

- Interface to the Rillsoft Integration Server
- You should have appropriate access rights.

4	2016_2_soft							
	Mo	Di	Mi	Do	Fr	Sa	So	
	1. Feb	2	3	4	5	6	7	
			08:00	syst	em test planning; 2	016_2_soft		
			08:00 software d	evelopme 17:00				
و.								
14								
12								
	-		10		1.0	4.5		
_	8	9	10	11	12	14		
	[16:00		software	installation planni	ng; 2016_2_soft			
	system test pla							
문	16:00 software tr	ansition planning;	2016_2_s(17:00					
14.								
ó								
	15	16	17	18	19	20	21	
	software install	11:00	so	ftware engineering	a environment: 201	6 2 soft		
	09:00 following	and updat 11:00						
e		11:00 software d	evelopment library	: 2016 2 : 17:00				
1.1		11:00 software te	est environment: 20	16 2 soft 11:00				
1.								
6								
_	22	23	24	25	26	27	28	
	software engineer	ing envirc 11:00			13:00 non-d	eliverable software	; 2016_2_soft	
	08:00	software de	evelopment files; 20	016_2_soft	12:00			
E.								
28								
22.								
	29	1. Mrz	2	3	4	5	6	
	non-deliverable so	oftware; 2(11:00		15:00	system design; 20	016 2 soft	Bis 10. Mrz 🌩	
		11:00 analysis	of user input; 2016	_2_soft 15:00				
M				15:00 softwa	are requirements a	nalysis; 2016 2_soft	Bis 9. Mrz 🌩	
9				15:00	operational concep	t; 2016 2 soft	Bis 9. Mrz 🌩	
E				15:00	vstem requirement	s: 2016 2 soft	Bis 7. Mrz 🌩	
29.								

1. Sign up in Rillsoft Integration Server by Web interface.

Loged in Rillsoft Integration Server									
Username:	Diligent								
Password:	•••••								
Remember me:									
	Login								

2. Select the menu item **ADD-ONS > iCalendar**.

	ADD-ONS	
🛄 Calendar	Retention period •	😇 Import System 🔻
® E-mail Notification ▼	E LDAP	🔜 Timeline
避 Vacation 👻	😇 Timesheet 🔻	😇 Vacation import 👻

3. Select what information you want to display in Outlook as Calendar. For example **Project calendar**

User calendar of subsidiaries users Company calendar Portfolio calendar Project calendar

4. Select a project from the list. For example Maschine AAA and click the column Aktion button Calendar.

User calend	ar Calendar of subsidiaries users	Company calendar	Portfolio calendar	Project calendar	
Actions	Company	Project	URL		
P	EN_2016	software development	http://localhost/ris6/api	/icalendar/getics?api_k	xey=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=1
P	EN_2016	Project1	http://localhost/ris6/api	/icalendar/getics?api_k	xey=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=3
9	EN_2016	new_software develop	http://localhost/ris6/api	/icalendar/getics?api_k	xey=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=4
P	EN_2016	Project2	http://localhost/ris6/api	/icalendar/getics?api_k	xey=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=8
9 🔳 👞	EN_2016	2016_2_soft	http://localhost/ris6/api	/icalendar/getics?api_k	xey=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=9
P 🖪 🔨	EN_2016	software development	http://localhost/ris6/api	/icalendar/getics?api_k	key=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=2
9 🖪	EN_2016	software development	http://localhost/ris6/api	/icalendar/getics?api_k	key=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=5
9	EN_2016	software process	http://localhost/ris6/api	/icalendar/getics?api_k	key=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=6
P	EN_2016	test_email	http://localhost/ris6/api	/icalendar/getics?api_k	<pre>key=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&project_id=7</pre>

4.20.5 Export XML for Web

You can use the XML export to publish your project data in the intranet.



To publish the project in the Intranet/Internet, proceed as follows:

- Select the menu item File > Export > XML for Web
- Enter a file name
- Click on button Save

Then copy the project file in XML format on the Web server and create a reference to the file.

CHAPTER

FIVE

RESOURCE MANAGEMENT

5.1 Create resources

5.1.1 Identify resources

Rillsoft Project provides two types of resources:

- **Resource pool** a total list of resources which can be allocated to project activities. Resource pools can be used for one or several projects.
- Project resources resources which can be used for one project only.

Resources are: roles, teams, employees, material resources, materials and machines that can be assigned / allocated to a project for the activity execution.

Ressource pool or project resources?

In general, if you open Rillsoft Project, the resource pool is active.

Name:	Project1		c	lode:	
General	Preferred team	Shared machine types Shared machinery	Headers and footers Format Color User fields Notes		
Due date Start: Finish: Cutoff date	Date Time 08.02.16 * 00.00 29.02.16 * 00.00 : 08.02.16 * 00.00	Project calendar: 1 Standard	Project settings Color: Automatic color * Time step: 1 hour • Duration: in workdays(dependent on project c *) Use for subordinated subprojects and activities Effort: in hours * Enter deliverable for activity(Example: 150 M?) Enter effort for activity(Example: 5 man-hours)		OK Cancel
RESOURCE PO	OL FILE: D:\01 RP\Samp	les_en\RillPrj.xml	🔁 📰 🔜 WEEK1:3	·I	+ .::

Name and path of the actual resource pool file are in the left corner of the status bar.

Caution: If you open the project and the resources used by this projects are different from the resource pool,

1. first, the message appears

Rillso	ft Project						
i	Resources stored in the project have some differences from the resource pool. Project is automatically switched on project resources.						
	Using the menu item 'Project/Switch to Resource Pool' to switch it to the resource pool.						
	<u>o</u> k						
🗌 Don't display again.							

2. the program switches automatically from the resource pool to the project resources.

The status bar displays project resources used in the open project.

		1		
RESOURCE POOL: http://localhost/ris6/21	USE PROJECT RESOURCES	🔁 📰 🖬 DAY1:1	- I	- + .#

For manual switching between resource pool and project resources, there are two commands in the menu bar:



- Project / Shift to resource pool
- Project / Shift to project resources

If, for instance, the project resources are active, the menu item **Project > Project resources > Project resources** is not available.

Shift project resources to resource pool

If the project resources match the resource pool, users do not recognize the shifting from one to the other resource. The shifting to project resources does not require the user to take any additional action. If during the shifting process to the resource pool, there are differences between project resources and resource pool, the program displays a list with the deviations. Then, you can choose between using project resources and resource pool.

Creation and adjusting resources

In order to create resources in the resource pool, select the menu item File > Resource pool > Create.

Rillsoft with interface to Rillsoft Integration Server

Here you should create a client in the Rillsoft Integration Server surrounding by Web browser and then click on File > Resource pool > Rillsoft Integration Server > Select

Here you can:

- · adjust and edit existing resources
- · create new resources manually
- · import resources from a text file

5.1.2 Create new resource pool file

You find the resource pool in the file RillPrj.xml in the Rillsoft Project data folder. You can create a new resource pool.

Close all projects before creating a new resource pool.

- Select the menu item File > Resource pool > File > Create
- Enter a name for the new file *.xml in the opening dialogue window.

$\langle \boldsymbol{\epsilon} \rangle$	
New	File
Open	Select Select a resource pool from a file.
Last used	-13
Save	Create Create Create a new resource pool file.
Save as	Integration Server
Resource pool	Select Select a resource pool of the integ

Note: The name of the actual resource pool file is shown in the left corner of the status bar. A project should then be opened.

Name:	Project1			Code:
General Due date Start: Finish: Cutoff date	Preferred team St Date Time 08.02.16 > 00.00 29.02.16 > 00.00 b: 08.02.16 > 00.00	hared machine types Shared machinery Project calendar:	Headers and footers Format Color User fields Notes Project settings Inour Time step: 1 hour	OK Cancel
RESOURCE PO	OOL FILE: D:\01 RP\Sample	es_en\RillPrj.xml		WEEK1:3 + .::

5.1.3 Create new resource pool in Rillsoft with interface to Rillsoft Integration Server

The resource pool is in data base solution in your database. You can create a new resource pool,

1. by creating a new client in Rillsoft Integration Server Web interface.

Rillsoft Integration Server 6.24.0							
	ADMI	NISTRATION	1	PR	OJECTS		
	🚾 Clients		👆 Client release	•	🔁 Projects		
Users	🔓 Organisation chart		🧞 User roles	Locks	Portfolio		
	Folders	-	Rolder roles		🗟 Links		
Client list		م					
+ Create	Filter:		Login				
Actions		Company	Name				
[? ■ ■ 📍 🌒 🗙 🔞 EN_2016							

2. Enter a name for the client.

New	New client									
۲	Main	Project settings	iCalendar	Retention period	Import System	Timeline	Vaca 🔪			
N: Di	ame: escription:	New Client 20	16							

3. In Rillsoft Project click on File > resource pool > Rillsoft Integration Server > Select.

4. Select a client.

RIS Client		3
Name	Description	1
OEN_2016		
New Client 2016		
•		
		-
		_
	OK Cancel	

Note: The name of the actual resource pool is shown in the left corner of the status bar. A project should then be opened.

Name: Project1	Code:
General Preferred team Shared machine types Shared machinery Headers and footers Format Color User fields Notes Due date Date Time 1 Standard •	OK Cancel
RESOURCE POOL: http://localhost/ris6/21	i +

5.1.4 Import of the resource pool from resource pool file in Rillsoft Integration Server

You can import a resource pool from Rillsoft xml file in the Rillsoft Integration Server.

1. First you should create a new client in Rillsoft Integration Server Web interface.

Rillsoft Integration Server 6.24.0							
	ADMI	NISTRATION	4	PR	OJECTS		
	🚾 Clients		🔓 Client release	•	🔁 Projects		
Users	B Organisation chart		Loser roles	Locks	📮 Portfolio		
	Folders	-	Noter Folder Foldes		🗟 Links		
Client list		•					
+ Create	Filter:		Login				
Actions		Company	Name				
🕑 💼 🔤 📍 🥏 🗙 🔞 🛛 EN_2016							

2. Enter the client name.

New client								
< Main	Project settings	iCalendar	Retention period	Import System	Timeline	Vace 🔪		
Name: Description:	New Client 20	16						

3. In Rillsoft Project select the menu item File > resource pool > Rillsoft Integration Server > import an.



4. Select a resource pool file in the dialog.

RE Öffnen			X
Computer > Volume (D:) > _SC	OFT_Ri	illsoft 🕨 👻 🍫	_SOFT_Rillsoft durchsuchen
Organisieren 🔻 Neuer Ordner			:= - 🔟 🔞
b Lokaler Datenträger (C:)	*	Name	Änderungsdatum
▲ Volume (D:)		Portfolios	02.11.2014 14:35
SOFT_Rillsoft		Projects Reports	10.06.2015 10:02 10.06.2015 10:02
▷ Ju 0_RIS_Inst ▷ D_tmp	=	Templates	10.06.2015 10:02
▷ 🔐 01 RP		Ticket Image: State of the state of	08.02.2016 13:27
		RillPrj.xml	04.06.2014 08:13
75513be0f462fe51f7364104564d		RillPrj_30_12_14.xml	30.12.2014 23:31
▷ 🔐 client_2		E Killerj_neu.xmi	05.06.2015 10:05
odutct1b20343c3cbel	Ŧ	•	· ·
Dateiname: RillPrj.xml		-	Resource Pool (*.xml)
			Öffnen Abbrechen

5. Click on **Open**.

Note: The name of the actual resource pool is shown in the left corner of the status bar. A project should then be

opened.

Name:	Project1			Code:
General Due date - Start: Finish:	Preferred team Shat Date Time 08.02.16 00.00 29.02.16 00.00	ared machine types Shared machinery Project calendar: 1 Standard • 1 Standard • Category: Priority: • Not selected - • • Not selected - • Baseline: •	Headers and footers Format Color User fields Notes Project settings	OK Cancel
RESOURCE PC	DOL: http://localhost/ris6/21			VEEK1:3 + .::

5.1.5 Select other resource pool

When you first start the program, you find the resource pool as RillPrj.xml-file in the Rillsoft Project data folder. You can choose another resource pool.

Close all projects before choosing another resource pool.

- Select the menu item File > resource pool > File > Select.
- Select the required file *.xml in the opening dialogue window.



Note: The name of the actual resource pool is shown in the left corner of the status bar. A project should then be opened.

Name:	Project1			Code:
General Due date Start: Finish: Cutoff date	Date Time 08.02.16 * 00:00 29.02.16 * 00:00 e: 08.02.16 * 00:00	Shared machine types Shared machinery Project calendar: I Standard Category: Priority: Not selected - Status: Not selected - Baseline:	Headers and footers Format Color User fields Notes Project settings Color: ▲ Jutomatic color ▼ Time step: 1 hour ▼ Duration: in workdays(dependent on project c ▼ Effort: in hours ▼ Enter deliverable for activity(Example: 150 M*) ✓	OK Cancel
RESOURCE PO	OOL FILE: D:\01 RP\Samp	oles_en\RillPrj.xml		1:3 • + .::

5.1.6 Set and adjust calendars

In order to set and adjust calendars, do as follows:

• Select the menu item Start > Properties > Resource.



The dialogue box **Resource pool** opens.

• Select the tab Calendar.

New Calendar r. Name Standard all 24_hours morning shift 6- late shift 14-22 injht shift 22-0 Veek Monday Tuesday Wednesday	Delete Calendar Code	Load Holi Duration Color 40 45 37.5 37.5 37.5 37.5	Jays Delete : Notes 5 5days- and 4 7 days 7 4	All Holida	iys	Image: Second system January 2024 M D F S S 1 2 3 4 5 6 7 2 8 9 10 11 12 13 14 3 15 16 17 18 920 21 4 22 23 24 25 26 27 28 5 29 30 31 14 14 14	M D M D F S S 5 1 2 3 4 6 5 6 7 8 9 10 11 7 12 13 14 15 16 17 18 9 20 21 22 23 24 25 9 26 27 28 29 May 2024	March 2024 M D M D F S 9 1 2 1 2 10 4 5 6 7 8 9 11 11 12 13 14 15 16 12 18 190 21 2 22 23 23 25 26 27 28 29 30 3
r. Name Standard all 24_hours moming shift 6- late shift 14-22 night shift 22-0 Veek Monday Tuesday Wecheseday	Code 14 6 08:00-12:00;13:00	Duration Color 40 45 168 37.5 37.5 37.5 37.5	Notes 5-days- and 4 5 days 45 h w 7 days			M D M D F S S 1 2 3 4 5 6 7 2 8 9 10 11 12 13 14 3 15 16 17 18 19 20 21 4 22 23 24 25 26 27 28 5 29 30 31 April 2024	M D M D F S 5 1 2 3 4 5 6 7 8 9 0 11 7 12 13 14 15 16 17 18 8 19 20 21 22 23 24 25 9 26 27 28 29 May 2024	M D M D F S 9 1 2 10 4 5 6 7 8 9 1 11 11 12 13 14 15 16 1 12 18 19 20 21 22 23 2 13 25 26 27 28 29 30 3 June 2024
Veek Monday Uuesday	6 08:00-12:00;13:00	37.5				April 2024	May 2024	June 2024
Veek Monday Tuesday Wednesday	08:00-12:00;13:00	17.00						
Wednesday	00.00 12.00,13.00	-17:00		8	▼ hrs hrs	Image: Constraint of the state of	I I 2 3 4 5 19 6 7 8 9 10 11 12 20 13 14 15 16 17 18 19 21 20 21 22 22 24 25 26 22 27 28 29 30 31	1 1 1 1 23 3 4 5 6 7 8 24 10 11 12 13 14 15 1 25 17 18 19 20 21 22 2 2 2 2 2 2 2 2 2 3 3 3 3 3 4 5 6 7 8 2 3 3 4 5 6 7 8 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 3
Wednesday	08:00-12:00;13:00	-17:00		8	hrs	July 2024	August 2024	September 2024
Thursday	08:00-12:00;13:00	-17:00		8	hrs	M D M D F S S	M D M D F S S	MDMDFS
Friday Saturday Sunday	08:00-12:00;13:00	-17:00 W	orking hours per week:	8 0 0 40	hrs hrs hrs hrs	28 8 9 10 11 12 13 14 29 15 16 17 18 19 20 21 30 22 23 24 25 26 27 28 31 29 30 31	31 5 6 7 8 9 10 11 33 12 13 14 15 16 17 18 34 19 20 21 22 24 25 35 26 27 28 29 30 31	36 2 3 4 5 6 7 37 9 10 11 12 13 14 1 38 16 17 18 19 20 21 2 39 23 24 25 26 27 28 2 40 30 <
tervals can be separa	ted by using a semic	olon.				October 2024	November 2024	December 2024
)ay - 30.08.24 Default Holiday After day	08:00-12:00		Ÿ	4	hrs	M D M D F S S 40 1 2 3 4 5 6 41 7 8 9 10 11 12 13 42 14 15 16 17 18 19 20 43 21 22 23 24 25 26 27 44 28 29 30 31 1 1	M D M D F S S 44 1 2 3 4 4 6 11 2 3 45 4 5 7 8 9 10 46 11 12 13 14 15 15 17 47 18 19 20 21 22 23 24 48 25 26 27 28 29 30	M D M D F S 48 49 50 9 10 11 12 13 14 1 51 16 17 18 19 20 21 2 52 23 24 25 26 27 28 2 1 30 31

• In order to create a new calendar, click on the button **New calendar** or enter a calendar name in the column **Name**, which is marked with an asterisk (*).

Note: The list of calendars shows all the calendars that have been created. Mark one of the calendars to view detailed information or to make changes.

- In the field **Week** define the worktime for each of the days in a week. Intervals can be separated by using a semicolon (example: 08:00-12:00; 13:00-17:00).
- In the field **Day** define the non-working days. You can enter deviating worktimes for single days (such as Shrove Tuesday). You can also define additional workdays.
- Mark the day in the calendar view you want to change.
- Select the Default Option, if you want to set the changes made to a day to its default weekday definition.

- Select the Holiday Option, if the marked day is a holiday.
- Select the **After day... Option**, if the marked day should be subjected to the rules of another weekday. Select the corresponding weekday definition from the drop down menu.

Note: If you change the worktimes in the weekday definition, the worktime of this day will be changed accordingly.

• You can select the**Exceptions Option** to define an individual worktime for the marked day.

Note: Any changes to the worktime in the weekday definition has no effects on this day.

Note: In order to delete a calendar, click on the button Delete calendar.

• Click on the button **OK**.

Download holidays

You can download official holidays for coming years and different federal states from our server to you program. Accept these holodays by clicking on the button **Load holidays**. We recommend the following procedure:

R Holidays Load	×
Calendar: DF - A	Alle Bundeslander
Holiday	Name
🔫 🗹 26.12.14	Zweiter Weihnachtsfeiertag
2015	
✓ 01.01.15	Neujahrstag
☑ 06.01.15	Heilige drei Könige
☑ 16.02.15	Rosenmontag
✓ 03.04.15	Kafreitag
☑ 06.04.15	Ostermontag
✓ 01.05.15	Tag der Arbeit
☑ 14.05.15	Christi Himmelfahrt
25.05.15	Pfingstmontag
26.05.15	Wäldchestag
V 04.06.15	Fronleichnam
☑ 08.08.15	Friedensfest
☑ 15.08.15	Mariä Himmelfahrt
✓ 03.10.15	Tag der Deutschen Einheit
☑ 31.10.15	Reformationstag
✓ 01.11.15	Allerheiligen
☑ 18.11.15	Buß- und Bettag
25.12.15	Weihnachten
26.12.15	Zweiter Weihnachtsfeiertag
⊘2016	
01.01.16	Neujahrstag
06.01.16	Heilige drei Könige
08.02.16	Rosenmontag
25.03.16	Karfreitag
28.03.16	Ostermontag
	OK Cancel

- The dialogue window Load holidays appears.
- Select your calendar from the drop dowm menu Calendar, such as GER-all states.
- You can accept the holidays for the entire year by marking the check box next to the year date, such as 2015.
- Alternatively, you can mark only particular holidays and enter them in your calendar.
- Click on the button **OK**.

5.1.7 Set and adjust roles

Rillsoft Project allows you to define roles in a flexible way, because you can set different quality ranks with graded cost rates for roles. We recommend you to define roles in a way that allows you to manage them in groups. You should define a group for each of the roles individually (example: floor tiler, carpenter, ...)

Enter the qualification and corresponding cost rate directly in the group (example: carpenter - foreman, master, craftsman, apprentice, etc.).

In order to set and adjust roles, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box **Resource pool** opens.

• Select the tab **Roles**.

ter:			7/9		New Group	New in the Gro	bup In	nport E	qort	Delete Marke	ed [Delete Group	Delete
Nr.	Role		Code	Qualificatio	n	Cos	ts Price adjustr	ment Notes					
1.001	programmer			C++		50.0	0						
1.002	programmer	r		PHP		45.0	0						
1.003	programmer	r		V.Basic		50.0	0						
2.001	writter					30.0	0						
3.001	manager					60.0	0						
4.001	designer					60.0	0						
							-						
5.001	analyst					70.0	0						
6.001	support					50.0	0						
		11.001											
ole:		programmer											
de:													
alificatior	n:	C++											
st:		50 \$	\$ per Hour										
st adjustr	ment:												
toe:													

- Create a new group by clicking on the button **New group** or on the row that is marked with an asterisk (*), enter a new group name in the column **Role**.
- Enter a specific role in this group in the row (column Qualification).

- You can enter more qualification ranks in the empty row below in the column **Qualification**, which copies the group name automatically. **Note:** To change the role name, you need to do this in the first group row, which automatically transfers the group name to all the other saved qualification ranks.
- Enter a specific value in the column Code to exchange data with other applications.
- Enter the costs per hour in the field **Costs**.
- After a particular date, you can enter either a coefficient for an existing unit price or a new unit price per hour and role in the field **Cost adjustment**.
- If necessary, enter a note in the field Notes.
- Click on the button **OK**.

Import / export of roles

Click on the button Export to export a resource to a TXT file or on the button Import to import resources.

Import / export fields:

- [ID]
- [Role](required field)
- [Code]
- [Qualification](required field)
- [Costs]
- [Cost adjustment]
- [Notes]

The individual fields are separated by a hash key "#".

Sample of an import file: #Stucco plasterer, plasterer##Foreman - construction#23.00##

Note:

• You can search for roles in the field Filter. Enter the search phrase (or a part of it) in the field.

5.1.8 Set and adjust teams

The team management in Rillsoft Project is very flexible: You can define teams by means of the assigned employees or via fixed costs and capacities. We recommend you to define teams in a way that allows you to manage them in groups. You should define a group for each of the teams individually (example: Team floor tiler, Team carpenter, ...)

You enter the team name and the capacities directly in the group. (Example: Foreman - Team early shift, Team late shift.)

In order to set and adjust teams, do as follows:

• Select the menu item Start > Properties > Resource.



The dialogue box Resource pool opens.

Resource po	ol		1													
Calendar (6)	Roles (9)	Teams (4)	Employee	e (13) Mate	erial (6)	Machine ty	pe (2)	Machinery (2) Proje	ct categories (3)	Project status	(4) Projec	t customers	; (2)	20110	Delete All
Nr.	Working on	0.10	Code	E-mail	Team	Hewe	Calendar	- 9	hift cal	Non-working d	Capacity by	Canacity	Coste	Price adjue	Notes	Delete Mi
11.001	North	oup	CODE	Lindi	Team A	A	Caleriual		nint Gal	Nort-Working d	Medium	3	120.00	r noc aujus	NOLES	
12.001	South										Medium	5	240.00			
12 001	East										Modium	2	90.00			
13.001	Edst										Medium	2	50.00			
14.001	West										Medium	2	100.00			
*																
Nr.:		11.001														
Working gro	oup:	North														
Code:						E-ma	il:									
Team:		TeamA														
Calendar:						*										
Shift calenda	ar:															
Capacity typ	y udys:	Medium				•										
Capacity	<i>.</i>	moulum	3													
Cost:			120 \$per	Hour												
Cost adjustr	nent:															
Notes:																
													ОК	Abbre	chen	Hilfe

• Select the tab Teams.

- Create a new group by clicking on the button **New group** or on the row that is marked with an asterisk (*), enter a new group name in the column **Working group**.
- Enter a new team type in this group in the row (column **Team**).
- You can enter more team types in the empty row below in the column **Team**, which copies the group name automatically. **Note:** To change the group name, you need to do this in the first group row, which automatically transfers the group name to all the other saved team types.
- Enter a specific value in the column Code to exchange data with other applications.
- From the drop down list **Calendar**, select the calendar that should apply for this team. If you have not selected a calendar, the program searches for a valid calendar in the following order : Activity calendar and project calendar.
- Enter the non-working days of the team (job trainings, workshops, etc.) in the field **Non-working days**. Note: (Example for a definition of non-working days: 18.03.05-22.04.05; 25.05.05; 08.06.05-17.06.05).
- Select the option according to which you want to calculate the capacity and costs of the team in the drop down menu **Capacity type**.
 - Fixed: For manual capacity and costs fixing in the columns Capacity and Costs. Note: This option is only applicable in case of the team definition by capacity and costs per hour, without assigning employees to the teams. If you combine employees with teams, we recommend you to use one of the following options.
 - **Optimistic:** The capacity and costs calculation is done on the basis of a higher level of productivity and the corresponding cost rates of each employee.

- **Real:** The capacity and costs calculation is done on the basis of the real cost rate and the corresponding productivity level of each employee.
- Median: The capacity and costs calculationis done on the basis of the median value from the productivity level and the cost rate of each employee.

Note: The options **Optimistic**, **Real** and **Median** provide different results only when an employee has been assigned to several roles and is recorded with these several roles as team member.

- Enter the capacity for all team members, which is calculated in dependence to the selected type of calculation in the field Capacity type (corresponds normally with the number of team members) in the field **Capacity**. You can change this value in the option Fixed.
- In the field **Costs**, enter the total cost rate for all team members, which is calculated in dependence to the selected type of calculation in the field **Capacity type**. You can change this value in the option **Fixed**.
- After a particular date, you can enter either a coefficient for an existing unit price or a new unit price per hour of the team in the field **Cost adjustment**.
- If necessary, enter a note in the field **Notes**.
- Click on the button **OK**.

Import / export of teams

Click on the button Export to export a resource to a TXT file or on the button Import to import resources.

Import / export fields:

- [ID]
- [Working group](required field)
- [Code]
- [Team](required field)
- [Calendar]
- [Non-working days]
- [Capacity type]
- [Capacity]
- [Costs]
- [Cost adjustment]
- [Notes]

The individual fields are separated by a hash key "#".

Sample of an import file:

#Underground construction###Team underground construction#######

Note:

• You can search for teams in the field Filter. Enter the search phrase (or a part of it) in the field.

5.1.9 Set and adjust employees

The employee management in Rillsoft Project is very flexible. You can assign several different roles, team memberships, costs and productivity to employees.

Note: We recommend you to create teams before you define employees.

In order to set and adjust employees, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box Resource pool opens.

• Select the tab **Employees**.

filter:			1	3/22		Nev	v Group	New in th	e Group	Import	Export	Delete Marked	De	elete Group	D	elete Al
Nr.	First name	Last name	Code	E-mail	Calendar	Begin	End	Shift cal	Non-worki	Working a	Role - gualificat	Productivity	Costs	Price adi	Notes	4
12.01	Red	Superman		superma	2 all 45-h				04.01.16-0	12.001 So	13.001 manager	100	50.00			
13.01	John	Tidy		td@ama					04.01.16-0	11.001 No	11.001 progra	100	40.00			
13.02	John	Tidy		td@gma					04.01.16-0	11.001 No	11.003 progra	100	40.00			
4.01	Bill	Diligent		dlg@gm				05.02.24	07.01.16-0	13.001 East	11.003 progra	100	40.00			
14.02	Bill	Diligent		dlg@gm					07.01.16-0	13.001 East	11.002 progra	100	40.00			
15.01		Goeslike		goeslike					04.01.16-0	12.001 So	16.001 support	100	40.00			
15.02		Goeslike		goeslike					04.01.16-0	12.001 So	12.001 writter	100	40.00			
6.01		Sleeper		slp@gm					04.01.16-0	14.001 W	11.001 progra	100	50.00			
()		01		1.0					01.04.40.0	41.004.00		400	50.00			•
		14.01														
rstname:		Bill				Lastna	ime: D	Diligent								
ode:						E-mail:	d	dlg@gmail.com								
lendar:						* Begin:	_	· *	End:							
nift calenda	ar:															
n-working	days:	07.01.16-0	8.01.16/	V;18.01.16/l;	19.01.16/1;09	9.02.16-12.02	16;29.03	3.16-31.03.16;2	7.05.16;12.09.1	16-16.09.16;02	2.11.16-04.11.16;27	.12.16-30.12.16;0	07.09.17	7;19.09.17;0	8.05.23	-12
orking gro	up - Team:	13.001 Eas	st													
le - Qualif	ication:	11.003 pro	grammer	- V.Basic												
oductivity:			100 %													
st:			40 \$	per Hour												
st adjustm	ient:															

- Create a new group or a new employee by clicking on the button **New group** or on the row that is marked with an asterisk (*), enter a new employee name in the column **Name**.
- Enter the property of an employee (a new role or team membership) in this group in the row (columns **Working** group team and **Role qualification**). You can enter additional properties of the employee directly in the empty row below the column **Working group team** and **Role qualification**, while the group description is

automatically copied. **Note:** In order to change the group name, at first you need to do this in the first group row, which automatically transfers the group name to all the other saved material types.

- Enter a specific value in the column Code to exchange data with other applications.
- Enter an Email address of the employee in the column Email.
- From the drop down list **Calendar** select the calendar that should be applied for this employee. If you have not selected a calendar, the program searches for a valid calendar in the following order: Team calendar, Activity calendar and Project calendar.
- Enter the date the employee has entered the company in the field Entry.
- Enter the date the employee has left the company in the field Leaving.

R	source po	ool			1.	click o	n			_									×
_	alendar (6) Roles (9)	Teams (4)	Emplo	iyee (13) N	laterial (6)	Mach	e typ	oe (2) Ma	hine y (2) P	roject categor	ies (3) Proj	ect status (4) Pr	oject customers	(2)			
	Filter:			1	13/22		N	lew 0	roup	Vew in th	e Gro	up In	mport	Export	Delete Marked	Delete	Group	Delete	All
	Nr.	First name	Last name	Code	E-mail	Calendar	Begir	,	End	Shift c	al	Non-worki	Working	Role - qualificat	Productivity	Costs	Price adj	Notes	
	12.01	Red	Superman		superma	2 all 45-h						04.01.16-0	12.001 S	13.001 manager	100	50.00			
	13.01	John	Tidy		td@gma		19.03	3.24 ~	28.07.23			04.01.16-0	11.001	11.001 progra	100	40.00			
	13.02	John	Tidy		td@gma		4		März 20	24		4.01.16-0	11.001	11.003 progra	100	40.00			
	14.01	Bill	Diligent		dlg@gm			No E	Di Mi Do	Fr Sa	a So	7.01.16-0	13.001 E	11.003 progra	100	40.00			
	14.02	Bill	Diligent		dlg@gm		10	4	5 6 7	8 9	9 10	7.01.16-0	13.001 E	11.002 progra	100	40.00			-
	4						12	18 [9 20 21	22 23	3 24							•	
	Nr.:		13.01				13 14	25 2 1	2 3 28	29 30 5 (031 67		➡ 2.s	select date	•				
	Firstname:		John						Heute: 1	9.03.202	4								
	Code:							E-ma	il: td(≬gmail.co	m								
	Calendar:						•	Begir	n:	*	,	End:	28.07.23 -						

• Click in the **Shift calendar** field if an employee is to work at different times according to different calendars. First select a time period for a work calendar by holding down the left mouse button. Then select a desired calendar for this time. The prerequisite is that the calendars to be selected should have been created in the resource pool on the **Calendar** tab.



- Enter the non-working days of the employee (job trainings, workshops, etc.) in the field **Non-working days**. Note: The entered non-working days will be added to those defined in the team. (Example for a definition of non-working days: 18.03.05-22.04.05; 25.05.05; 08.06.05-17.06.05).
- Select the team which you want the employee to be assigned to in the drop down list **Working group team**.

	🛯 Workin	g group - team			×
	Emple	oyee: 14.01 Diligent, Bill			
	/	Filter:			4
	Nr.	Working group	Code	Team	Costs
	11.001	North		Team A	120.00
[]	12.001	South			240.00
	✓ 13.001	East			90.00
	14.001	West			100.00

• Select the role which you want to assign to the employee in the drop down list Role - qualification.

Role - d	qualification			×
Empl	loyee: 14.01 Diligent, Bill			
r	Filter:			9
Nr.	Name	Code	Qualification	Costs
L 11.001	programmer		C++	50.00
11.002	programmer		PHP	45.00
☑ 11.003	programmer		V.Basic	50.00
12.001	writter			30.00
13.001	manager			60.00
14.001	designer			60.00
15.001	analyst			70.00
16.001	support			50.00
17.001	tester			60.00
17.001	tester			60.00

- Enter a different value for the calculated productivity of an employee in percent in the field **Productivity**.
- Enter a different value for the calculated hourly rate of an employee (for instance, from the role definition) in the field **Costs**.
- After a particular date, you can enter either a coefficient for an existing unit price or a new unit price per hour of the employee in the field **Cost adjustment**.
- If necessary, enter a note in the field Notes.
- Click on the button **OK**.

Assign additional roles, teams, costs and productivity to an employee

If you want to assign a different role along with its different cost rate to an employee, do as follows:

• Enter the different value in the row of the employee directly below (no asterisk) in the corresponding column. **Caution:** Make sure not to define this employee in another row, which features an asterisk, because this may cause inconsistencies within the project.

Import / export of employees

Click on the button Export to export a resource to a TXT file or on the button Import to import resources.

Import / export fields:

- [ID]
- [First Name]
- [Last Name](required field)
- [Code]
- [Email]
- [Calendar]
- [Entry date]
- [Leaving date]
- [Non-working days]
- [Team]
- [Role]
- [Productivity]

- [Costs]
- [Cost adjustment]
- [Notes]

The individual fields are separated by a hash key "#".

The number you want to import from "#" symbols in imported txt file must always be 14. If more or less "#" symbols are registered, you will get an error message

Example of an import file (only employee names and the corresponding hourly rates are imported):

#MA-1#N-MA-1#1000001#MA1.NMA1@musterfirma.com######11.001 Team 1#11.001 Role 1####

oder

Note:

• You can search for employees in the field Filter. Enter the search phrase (or a part of it) in the field.

5.1.10 Set and adjust materials

We recommend you to define materials (consumables) in a way that allows you to manage them in groups. You may define a group for each of the materials (for instance: group gravels...).

Manufacturer, type of material, measurement unit and costs are then entered in the group. (Example: gravel - grit, ballast, etc.)

In order to set and adjust materials, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box **Resource pool** opens.

• Select the tab Material.

Resource po	ol											;
Calendar (6)	Roles (9)	Teams (4) Em	ployee (13) Ma	aterial (6) Machine type (2)	Machinery (2) Proje	ct catego	ories (3) Proje	ct status (4)	Projec	t customers (2	2)	
Filter:			2/6	New Group	New in the Group		Import	Export	Dele	te Marked	Delete Group	Delete All
Nr.	Material gro	up	Code	Material type		Unit	Unit price	Price adjust	tment	Notes		
12.001	Metals			Steel		100 kg	156.00					
12.002	Metals			Stainless steel		100 kg	267.00					
12.003	Metals			Spring steel		50 kg	170.00					
13.001	Non-ferrous	metals		Aluminium		1 kg	20.00					
13.002	Non-ferrous	metals		Copper		10 kg	150.00					
13.003	Non-ferrous	metals		Brass		10 kg	170.00					
•												
Nei		12 001										
DI		12.001										
Material grou	up:	Metals										
Code:												
Material type	e:	Steel										
Unit:		100 kg										
Unit cost:		156	\$									
Cost adjustr	ment:											
Notes:												
										OK	Abbrachen	Lliffe

- Create a new group by clicking on the button **New group** or on the row that is marked with an asterisk (*), enter a new group name in the column **Material group**.
- Enter a new material type in this group in the row (column **Material type**). You can enter more material types in the empty row directly below in the column Description, which copies the group name automatically.

Note: To change the group name, at first, you need to do this in the first group row, which automatically transfers the group name to all the other saved material types.

- Enter a specific value in the column Code to exchange data with other applications.
- Enter the description / manufacturer, etc. of the material type in the field Material type.
- Enter the measurement unit of the material type (example: tons, square metres, piece, etc.) in the field **Measurement unit**.
- Enter the costs per measurement unit in the field Unit price.
- After a particular dateyou can enter either a coefficient for an existing unit price or a new unit price per measurement unit of the material in the field **Price adjustment**.
- If necessary, enter a note in the field **Notes**.
- Click on the button **OK**.

Import / export of materials

Click on the button **Export** to export a resource to a TXT file or on the button **Import** to import resources.

Import / export fields:

- [ID]
- [Material group](required field)

- [Code]
- [Material type](required field)
- [Measurement unit]
- [Unit price]
- [Price adjustment]
- [Notes]

The individual fields are separated by a hash key "#".

Sample of an import file: #Building construction - Ready-mixed concrete##Ready-mixed concrete BI: B 5 KS 0/32 HOZ 35L#m3#122.00##

Note:

• You can search for material groups, material types or the material code in the field **Filter**. Enter the search phrase (or a part of it) in the field.

5.1.11 Set and adjust machine types

We recommend you to define machine types in a way that allows you to manage them in groups. You may define a group for each of the machine types (for instance: lifting davits, tower cranes ...).

Manufacturer and machine or device type are then defined within the group (Example: Lifting davits - Lifting davit type 10 to, Lifting davit type 100 to, etc.)

In order to set and adjust machines, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box **Resource pool** opens.

• Select the tab Machine types.

			2/2		New Group	New in the G	roup	Import	Export	Delete Marked	Delete Group	Delete
lr.	Machine gro	oups	Code	Machine typ	e		Unit	Unit price	Price adjustment	Notes		
2.001	Rotate mach	hine						85.00				
3.001	Milling mach	nine						90.00				
		12.001										
chine gro	oup:	Rotate machine										
e:												
chine typ	e:											
ti												
cost:		85	\$ per Hour									
t adjustn	nent:											
BS:												

- Create a new group by clicking on the button **New group** or on the row that is marked with an asterisk (*), enter a new group name in the column **Machine group**.
- Enter a new machine type in this group in the row (column **Description**). You can enter more machine types in the empty row below in the column machine type, which copies the group name automatically. **Note:** To change the group name, at first, you need to do this in the first group row, which automatically transfers the group name to all the other saved machine types.
- Enter a specific value in the column Code to exchange data with other applications.
- Enter the description / manufacturer, etc. of the machine type in the field Machine type.
- Enter the measurement unit of the tool or machine type (example: piece, etc.) in the field Measurement unit.
- Enter the costs per hour of the machine type in the field Unit price.
- After a particular date you can enter either a coefficient for an existing unit price or a new unit price per hour and machine type in the field **Price adjustment**.
- If necessary, enter a note in the field Notes.
- Click on the button **OK**.

Import / export of machine types

Click on the button Export to export a resource to a TXT file or on the button Import to import resources.

Import / export fields:

- [ID]
- [Machine group](required field)
- [Code]
- [Machine type](required field)
- [Measurement unit]
- [Unit price]
- [Price adjustment]
- [Notes]

The individual fields are separated by a hash key "#".

Sample of an import file:

#Construction machines - Dredgers##Demolition dredges - Caterpillar#Pcs.#32.00##

Note:

• You can search for machine groups, machine types or the machine type code in the field **Filter**. Enter the search phrase (or a part of it) in the field.

5.1.12 Set and adjust machinery

The machinery management in Rillsoft Project is very flexible. You can allocate a machine to machine types and to unit prices or to price adjustments.

Manufacturer and machine or device type are then defined within the group. (Example: Lifting davits - Lifting davit type 10 to, Lifting davit type 100 to, etc.

In order to set and adjust machinery, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box **Resource pool** opens.

• Select the tab Machinery.

			2/2		New Group	New in the Group	Import	t Export	Dele	te Marked	Delete Group	Delete /
lr. N	Nachine nan	ie	Code	Working group	-team Machir	ne group - Machine type	Unit price	Price adjustment	Notes			
2.01 m	achine 1				12.001	Rotate machine	85.00					
3.01 m	nachine 2				13.001	Milling machine	90.00					
:	[12.01										
chine Name	: [machine 1										
le:												
rking group	- Team:											
chine type:		12.001 Rotate ma	chine									
cost:		85	\$ per Hour									
t adjustmen	t: [
es:												

- Create a new group by clicking on the button **New group** or on the row that is marked with an asterisk (*), enter a new group name in the column **Machine name**.
- Enter a specific value in the column Code to exchange data with other applications.
- Select the team which you want the machine to be allocated to in the drop down list **Working group team**.
- Select the machine type which you want to be allocated to the machine in the drop down list **Machine group machine type**.
- Enter the costs per hour of the machine in the field **Unit price**.
- After a particular date, you can enter either a coefficient for an existing unit price or a new unit price per hour and machine in the field **Price adjustment**.
- If necessary, enter a note in the field Notes.
- Click on the button **OK**.

Import / export of machinery data

Click on the button Export to export a resource to a TXT file or on the button Import to import resources.

Import / export fields:

- [ID]
- [Machine name](required field)
- [Code]
- [Working group team]

- [Machine group machine type](required field)
- [Measurement unit]
- [Unit price]
- [Price adjustment]
- [Notes]

The individual fields are separated by a hash key "#".

Sample of an import file: #Construction machines - Dredgers##Demolition dredges - Caterpillar#Pcs.#32.00##

Note:

• You can search for machine names, machine types or the machine code in the field **Filter**. Enter the search phrase (or a part of it) in the field.

5.1.13 Set and adjust project categories

Rillsoft Project allows you to summarize project categories in Groups in a flexible way.

In order to set and adjust project categories, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box **Resource pool** opens.

• Select the tab **Project categories**.

Resource po	ol													>
Calendar (6)	Roles (9)	Teams (4)	Employee	(13) Material	(6) Machine	type (2) Ma	achinery (2)	Project catego	ries (3) Pr	oject status (4)	Project cus	stomers (2)		
Filter:			3/3	3		New Group	New in	the Group	Import	Export	Dele	te Marked	Delete Group	Delete All
Nr.	Group			Code	Name				Notes					
11.01	Strategic													
12.01	Operational													
13.01	Tactical													
*														
Nr.:		11.01												
Group:		Strategic												
Name:														
Notes:														
												ОК	Abbrechen	Hilfe

- Create a new group by clicking on the button New group or on the row that is marked with an asterisk (*), enter a new group name in the column Group.
- Enter a specific project categories in this group in the row (column Name).
- You can enter more category ranks in the empty row directly below in the

column **Name**, which copies the group name automatically. **Note:** To change the category name, you need to do this in the first group row, which automatically transfers the group name to all the other saved category ranks.

- Enter a specific value in the column Code to exchange data with other applications.
- If necessary, enter a note in the field Notes.
- Click on the button **OK**.

Note:

• You can search for project categories in the field Filter. Enter the search phrase (or a part of it) in the field.

5.1.14 Set and adjust project status

Rillsoft Project allows you to summarize the project status in groups in a flexible way.

In order to set and adjust the project status, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box Resource pool opens.

• Select the tab **Project status**.

Resource p	loool																	×
Calendar	6) Roles (9)	Teams (4)	Employee	(13) Material (6) Mach	nine type (2)	Machinery (2)	Project cate	egories	s (3) Pro	oject stati	us (4) F	roject cu	stomers (2)				
Filter:			4/4	4		New Grou	Ip New i	n the Group		Import	E	xport	Dele	te Marked	D	elete Group	D	elete All
Nr.	Group			Code	Name					Notes								
11.01	in work																	
12.01	in planning																	
13.01	completed																	
14.01	rejected																	
Nr.:		12.01																
Group:		in planning																
Code:																		
Name:																		
Notes.																		
														04		Abbrook		Liffe
														UK		Abbrechen		niie

• Create a new group by clicking on the button New group or on the

row that is marked with an asterisk (*), enter a new group name in the column Group.

• Enter a specific project status in this group in the row (column Name).

• You can enter more status ranks in the empty row directly below in

the column **Name**, which copies the group name automatically. **Note:** To change the status name, you need to do this in the first group row, which automatically transfers the group name to all the other saved status ranks.

- Enter a specific value in the column Code to exchange data with other applications.
- If necessary, enter a note in the field Notes.
- Click on the button **OK**.

Note:

• You can search for the project status in the field Filter. Enter the search phrase (or a part of it) in the field.

5.1.15 Set and adjust project customers

Rillsoft Project allows you to summarize project customers in Groups in a flexible way.

In order to set and adjust project customers, do as follows:

• Select the menu item **Start > Properties > Resource**.



The dialogue box **Resource pool** opens.

• Select the tab **Project customers**.

Resource po	ol														×
Calendar (3)	Roles (8)	Teams (4)	Emplo	oyee (10)	Material (6)	Machine ty	pe (2) Ma	achinery (2)	Project cate	egories (3) F	Project status	(4) Proje	ct customers (1)	
Filter:				0/0		New	Group	New in the C	àroup	Import	Export	De	elete Marked	Delete Group	Delete All
Nr.	Name			Code	Website	Street	Postcode	City	State	Country	Contact	E-mail	Phone	Notes	
11.01	Mechanical	Engineering I	Preci		www.sa	Sample s	11246	Sample		Great Bri	Mr. Riech	m.riech	1126343		
*															
															•
			_												F
Nr.:		11.01		- in Deci	-i 0t-II										
Name:		Mechanical	Engine	ering Preci	SION GMDH										
Code:						Websit	e: W	ww.sample-m	echanical e	ngineering.uk					
Street:		Sample stre	et			Postco	de: 11	246 Cit	y: S	ample city					
State:		Mr. Dis ab				Country	y: Gr	eat Britain		- te e e de la colta	0	44.00	0.40		
Contact per	son:	Mr. Riech				E-mail:	30	n@sample-me	cnanicai en	gineering.uk	Phone:	1126	343		
Notes:															
													ОК	Abbrechen	Hilfe

- Create a new group by clicking on the button New group or on the row that is marked with an asterisk (*), enter a new group name in the column Group.
- Enter a specific project customers in this group in the row (column Name).
- You can enter more customers ranks in the empty row directly below in the column Name. In the following columns, you can enter further project-relevant information related to the customer, such as the address and contact data of a contact person.
- If necessary, you can add several addresses or contact person to a client in the directly following empty lines.

Thereby the group name in the **Name** column is automatically copied as well.

Note: To change the client name, you need to do this in the first group row, which automatically transfers the group name to all the other saved client ranks.

- Enter a specific value in the column Code to exchange data with other applications.
- If necessary, enter a note in the field Notes.
- Click on the button **OK**.

Note:

• You can search for project customers in the field Filter. Enter the search phrase (or a part of it) in the field.

5.2 Update resource pool

It might be useful to reload a resource pool that has been changed by a responsible person in order to apply the changes.

This function reloads the current resource pool.

• Click on the Update Resource Pool icon in the left corner of the status bar.



5.3 Assign resources

5.3.1 Resource allocation

Rillsoft Project provides you two variants of resource allocation:

- to allocate resources to **an activity**. First choose an activity in the Gantt chart and then select the resources, such as roles or employees, from the window Activity properties in the tabs. Then you may allocate the required resource accordingly.
- to allocate activities to **a resource**. First define a resource in one of the Resource utilization views and then, select the activities, to which you want to assign the resources, in the window Resource properties.
- **Personnel assign assistant**. If you have already defined personnel resources in the project in the form of roles, you can assign the employees to activities semi-automatically.

Important! A project schedule including activities should have been set up and the required resources, such as roles, teams and personnel need to be defined before the assignation time.

Check if you are working with a resource pool. There should be no project resources. If in the status bar is shown the Word **project resources**, then you should switch to the resource pool.

Allocate resources to an activity

RESOURCE POOL: http://localhost/ris6/21

In order to allocate an activity resource, proceed as follows:

- Select the menu item**Start > Activity views > Gantt chart**.
- Choose an activity either by selecting it from the Activity table or by leftclicking on it in the Gantt chart field. The activity will be marked and the information is shown in the lower part of the Properties window.
- Select one of the tabs with the resources, such as **Roles**, **Teams**, **Employees**, **Machines** etc., depending on what resource you want to allocate.
- The left table shows resources from the resource pool.
- Doubleclick on one of these resources.
- You can allocate several resources to one activity at a time. There, you can define the required quantity, utilization and effort and verify the readiness and availability of personnel resources.
- Finally, click **OK**.

Allocate activities to a resource

• Select one of the resource views such as Role, Team or Employee.



Tip! If roles have already been assigned, you can use the Capacity view personnel to assign employees to activities easily.

- In the filter **Start > Edit > Filter**, deactivate the option **Offer only used resources for selection**, to have all resources from the resource pool shown in the table.
- Choose a resource either by selecting it from the resources table or by leftclicking on it in the timescale field. The resource will be marked and the corresponding information is shown in the lower part of the Properties window.
- Select the tab Activities.
- Mark the check boxes of the activities.
- You can define different parameters of each resource for an activity.
- In this way, you can assign several activities to one resource at a time.
- Click on the button **OK**.

Personnel assign Assistant

🔁 📑 🖬 DAY1:1

Requirements: In order to assign employees to activities, at first, you need to assign personnel resources in the form of roles.

By means of the menu item **Project > Assistant > Employee > Assign employees to activities**, you can:

- The first step is to define what employees you want to assign.
- The second step is to mark the activities.
- Analyse and confirm the provided employee assignation.

Possible conflicts or overloads are marked in red. For this, there will be no automatic assignation / allocation.

5.3.2 Assign activities to a role in the view Role

In order to assign activities to a role, do the following:

- Select the view **Start > Resource views > Role**.
- Select the menu item **Start > Edit > Filter**.

The dialogue box **Filter** opens.

RE Filter			X
Project			
Project / Subproject: 2016	2 soft		-
Trojost / Cospisjost. 2010			
Period			
Peri 03.02.16 💌 00:	00		
to: 05.04.16 - 14:	00		
Activity			
Hide completed activitie	s		
Deserves			
Resources			
Show only overloaded r	esources		
Only already planned re	sources to choose from offer		
Nr.	Name	Code	Costs
Roles			
15.001	analyst		70.00
14.001	designer		60.00
13.001	manager		60.00
11.001	programmer - C++		50.00
11.002	programmer - PHP		45.00
11.003	programmer - V.Basic		50.00
16.001	support		30.00
12.001	writter		30.00
Teams	-		
13.001	East		0.00
11.001	North - Team A		0.00
12.001	South		0.00
L 14.001	West		0.00
Employee			
21.02	Consider (11.003 programmer - V.Basic)		0.00
21.01	Consider (11.002 programmer - PHP)		0.00
14.02	Diligent (11.002 programmer - PHP)		0.00
14.01	Diligent (11.003 programmer - V.Basic)		0.00
17.02	Eager (11.001 programmer - C++)		0.00
□17.01	Eager (15.001 analyst)		0.00 💌
	OK Cancel		

- Remove the tick from the check box **Offer only used resources for selection** to view all roles from the resource pool in the list.
- You can mark the check box **Roles** and transfer all roles to the view Role usage. **Alternatively** you can mark only selected roles.
- Click on the button **OK**.
- Select a role which you want to assign activities to in the table of the view Role usage. The tab **Activities** in the window Resource properties lists activities from the project schedule.

R 📁 🗔	<u>।</u> २ े े ।	ROLE USAGE						2016 pc	ortfolio							- 🗆 ×
FILE	START PROJECT	FORMAT														^
	Network diagram	(Time		Role	al: Employee	I. Resource	e chart 🝷	+	Project			t Activity -		• •	T	Cutoff date
	Gentt-network chart	e& Effort		Team	8 Machine	-∧ Cost cha	rt -	-=	Resour	0× 25× 50×	75× 100×		+ -		×	Current date
Gantt	Gantt-network chart	Cost	Employ	/ee	Machine	T Contt da				e 📑 🗰 🗰	×	t i Subprojec	S	tructure 🧋 📋		
chart		=> Cost		g other		- Gantt cha	art		C IIIIO			GD LINK *		• • • •	afta 💎	Project stant -
	Activity views	Variance analysis	Kes	ource views	Capacity views	Additional	view Us	ser views	Properties	s Schedul	le	Insert		Outline	Εάπ	Scrolling
	Cute 65 datas 14.0	47 44-00	- L P	/												\ ^
	Cutorr date: 11.01	1.17 14:00	~			Febru	uary 2016			1		March 2016				
				04	05	06	07		08	09	10	11		12	13	14
Nr.	Name		Effort	202	194	83	197		96	146	165	201		94	69	136
	programmer - C++		393	33	<u>59</u>	28	50		23	36	40	54		25	21	24
	programmer - PHP		140	12	40	12	37		39							
□ 11.003	programmer - V.Ba	sic	248	<u>17</u>	<u>40</u>	<u>13</u>	50		11	18	44	43		12		
1.10	software configurat	ion managem	1'	software con	ifiguration mana	agement										
2.2	task 4		65'			task 4										
3.1.8	following and upda	ting plans	15'				follow	ring and u	pdating pla	ns						
3.2.1	software engineeri	ng environment	40'				1111		software e	ngineering enviror	nment					
3.2.2	software test enviro	onment	10'				sof	tware tes	st environm	ent						
3.5	software requireme	ents analysis	30'								software	e requirement	ts analy	ysis		
3.7.1	software implement	ntation	40'									soft	ware in	nplementation		
3.8	unit integration and	Itesting	26'									unit int	egratio	on and testing		
3.11	software configurat	tion managem	21'											software con	figuration n	nanagement
	manager	-	18	18												-
4																•
ŭ 🚺	1.003 Name: progr	ammer - V.Basic													Code:	
Activitie	es Role															
																ОК
Nr.	Name	Pro	oject		Fixed	Duration	Start	*	Finish	Role	Quantity	Utilizat	Effort	Notes		ON
1.9	system qua	lification testing sof	tware deve	elopment proc	Duration	28	20.01.16 13	3:00 25.0	01.16 17:00	11.003 programmer.						Cancel
☑ 1.10	software co	onfiguration ma sof	tware deve	elopment proc	Duration	21	20.01.16 13	3:00 25./	01.16 09:00	11.003 programmer.	1	100	21			
1.11	software pr	oduct evaluation sof	tware deve	elopment proc	Duration	34	26.01.16 08	3:00 01./	02.16 10:00	11.003 programmer.						
3.1.2	2 system test	planning nev	<pre>w_software</pre>	a development	Duration	38	27.01.16 08	3:00 02.0	02.16 15:00	11.003 programmer.						
3.1.1	software de	evelopment pla nev	<pre>w_software</pre>	e development	Duration	18	27.01.16 08	3:00 29.0	01.16 10:00	11.003 programmer.		400	05		-	
	task 4	Pm	.iert1		Duration	65	28.01.16.08	200 100	02.16.09:00	11.003 programmer		100	65			
Only a	issigned activities															
-																
					1		1	-								

- Mark the check boxes of the activities.
- Among others, you can define the quantity, usage and effort of a role for an activity.
- Click on the button **OK**.

Role properties during assignation

During the assignation you can refine role properties by controlling and defining the following values for each activity:

- Number of roles
- Usage of a role
- Effort of a role
- Notes concerning a role.

Activity selection

During this assignation you can determine the activity list by activating /deactivating the following options:

• Assigned activities only lists only assigned activities.

Activities at a specific date

You can filter activities that are due at a specific date. If you leftclick on a cell showing the result from the row Roles and column Date, you will only receive the displayed activities that were defined for this particular time period.

RE 🧀 E	5¢∓	ROLE USAGE								2016_2	soft								-	
Columns	Sort Renumber Excel	Role Creams Employee	Custom field Votes & link Other Tooltips	s 🚮	Maxi Effor Avera	mum rt age	 □ Project ✓ Project ✓ Cutoff 	start ⊻ end ⊻ date □	Current Milesto Reserve	t date ne in ca time	lendar	Critical path Labels	Total Activi Emple	utiliza ity oyee	tion 🗌 Per	iod	Activitys in Group by	n a row role		
																	,			
	Cutoff date:	03.02.16 00:00		<<		•		Febru	ary 2016	6					Mai	rch 201	6			
						05		06		07		8	09	1	10	11		12	13	_
Nr.	Name	1	Status	Effort		40		107	1	81	1	38 1	120	1	35	122	1	160	63	
	programmer - C++			243				33	\$	51	1	15 3	31	3	7	22		33	21	
	programmer - PHP			76					2	29	4	17								
	programmer - V.Basic			143						55	1	11 1	10	2	8	19		20		
	writter			0																
⊞ 13.001	manager			0																
	designer			180				17	2	29		11 :	29	3	2	1		40	21	
	analyst			299		40		57	1	17		4	50	3	10	40		40	21	
	support			75											8	40		27		
																				_
4																				F
•																				
– 1	1.003 Name: programm	ner - V.Basic																Code:		
Activitie	es 🥒																			
[_					-	ОК
Nr. 🥖	Name		Subproje	ct			Duration	Start		Fi	nish	Role	Qu	antity	Utilizat	Effort	Notes			
1.1.3	software install	ation planning	project pla	anning a	nd ov	ersight	34	08.02.16	5 16:00	15.02.	16 09:00	11.003 program	mer							Cancel
1.1.5	tollowing and u	pdating plans	project pla	anning a	nd ov	ersight	10	15.02.10	5 09:00	16.02.	16 11:00	11.003 program	mer	1	100	10				
⊻1.2.2	software test e	eering environmer	nt establishi	ng a soft ng a soft	ware o	dev	40	16.02.16	5 11:00	23.02	16 11:00	11.003 program	mer	1	100	40				
1.2.3	software devel	opment library	establishi	ng a soft	ware o	dev	21	16.02.16	5 11:00	18.02.	16 17:00	11.003 program	mer							
Only a	assigned activities																			
proupp			CTRUCTUR												_	1		-		
RESOURCI	POOL: http://localhost/ri	50/21	STRUCTURE	Role													WEEK1:	3		- +

5.3.3 Role View Resource Properties

If you click on a row in the table at a role view, you can display detailed information about the role in the properties window.

🛃 🧀 🔣 🖯 🌣 🗖	" ROLE USAGE						
FILE START PROJ	ECT FORMAT						
Gantt Chart	C Time	Emplo	yee Cother •	Machine	. III Resource ☆ Cost chi Gantt chi	e chart * art * nart	Save
Cutoff date: 08	3.05.23 08:00	<<	Ma	ay 2023	Addition		USET VIEWS
			19	20	21	22	2
Nr. Name		Effort	88	96	192	136	5 17
	++	40					
🕀 11.003 programmer - V.	Basic	40			24	16	
🗉 12.001 🛛 writter 🚽		288			24	24	4
⊟ 13.001 manager		280	56	56	64	56	1
1.1 Cost estimate		8	Cost estimate	,			
1.2 Project procedu	re	80			Project p	rocedure	
3.1 Create the order	plan	40		Create the	order plan		
3.4 Set up the docur	ment control	40				Set	up the docume
3.6 Project cost con	trol	80					Pro
5.3 Ordering facilitie	s	32					

The role information can be tracked on the following tabs:

- Activities
- Role

Activities

Prop	erties															
	13.001 Name: manager												Code:			
Act	vities Role															
Nr.	Name	Subproject	Fixed	Duration	Start	-	Finish	Role	Quantity	Utilizati	Effort	Notes		4		OK
⊻1	1 Cost estimate	Phase 1	Duration	8	08.05.23 08:0	.80 00	05.23 17:00	13.001 manager	1	100	8					Cancel
⊠3	1 Create the order plan	Phase 2	Duration	40	10.05.23 08:0	00 16.	05.23 17:00	13.001 manager	1	100	40					
☑ 1	2 Project procedure	Phase 1	Duration	80	10.05.23 08:0	0 23.	05.23 17:00	13.001 manager	1	100	80					
⊡ 1	3 Completing the construction schedule	Phase 1	Duration	64	17.05.23 08:0	0 26.	05.23 17:00	13.001 manager	1	100	64					
	2 Planning the design phase	Phase 2	Duration	32	23.05.23 08:0	0 26.	05.23 17:00	13.001 manager								Help
3	5 Setting up the project monitoring	Phase 2	Duration	40	24.05.23 08:0	00 30.	05.23 17:00	13.001 manager							- 1	Theip
		D 1 D						40.004		****						
	ly assigned activities															

In the No. column you can assign the activities to the selected role by selecting it.

More information about the activities is available here.

The option **Only assigned activities** reduces the activity list to the activities that have already been assigned.

Role

P	operties									
	13.001	Name:	manager					Code:		
_	Activities	Role							1 F	
								Resource pool		OK
	Nr.	Role		Code	Qualification	Costs	Notes			Cancel
	13.001	manager				60.00				
									[Help

You can see the properties of the role entered in the resource pool from the tab.

Activities on specific date

R 🧀 🕫	🗄 🤈 ୯ 🗖 "	ROLE USAGE							
FILE	START PROJECT	FORMAT							
Gantt	Network diagram Gantt-network chart	 Continue Cost 	Emplo	Role	e m er ▼	Employee	Resource	ce chart * art * hart	⁺ <mark>m</mark> Sav I <mark>m</mark> Ma
A	ctivity views	Variance analysis	Re	source views	;	Capacity views	Addition	al view	User v
	Cutoff date: 08.05.2	23 08:00	~~	19	Ma	ay 2023 20	21		2
Nr.	Name		Effort	88		96	192	13	6
± 11.001	programmer - C++		40						
± 11.003	programmer - V.Bas	ic	40				24	16	
± 12.001	writter		288				24	24	
± 13.001	manager		280	56		56	64	56	
⊡ 14.001	designer		160	8			32		
1.1	Cost estimate		8	Cost esti	imate	•			
3.2	Planning the design	phase	32'				Pla	inning the	design
3.7	Complete the reque	stlist	80'						ļ
5.5	Briefing at start of co	nstruction	40'						
	analyst		200			24	48	40	

You can filter out activities that are due on a certain date. If you click with the left mouse button on a cell which is a result of the role line and the date column, you will only get the activities that are in question for the selected period.

P	oper 1	ies 4.001 Name: designer											Code:	
	Nr.	Name Planning the design phase	Subproject Phase 2	Fixed Duration	Duration 32	Start ▼ 23.05.23 08:00	Finish 26.05.23 17:00	Role 14.001 designer	Quantity 1	Utilizati 100	Effort 32	Notes		OK Cancel Help
	✓ Only a	ssigned activities												

5.3.4 Assign activities to a team in the view Team

In order to assign activities to a team, do the following:

- Select the view **Start > Resource views > Team**.
- Select the menu item **Start > Edit > Filter**.

The dialogue box **Filter** opens.

R Filter			X
Project			
Project / Subproject: 2016.2	soft		.
Period			
□ Peri 03.02.16 💌 00:00			
to: 05.04.16 - 14:00			
Activity			
Hide completed activities			
Passuras			
Resources			
Show only overloaded resource	rces		
Only already planned resource	ces to choose from offer		
	N	0.1	
	Name	Lode	Costs —
Roles			70.00
15.001	analyst		/0.00
	designer		60.00
	manager		60.00
	programmer - C++		50.00
	programmer - PHP		45.00
	programmer - V.Basic		50.00
16.001	support		30.00
	wntter		30.00
	F .		0.00
			0.00
	North - Team A		0.00
	South		0.00
	vvest		0.00
	Caracidar (11 002 and an anna 1 (Parcia)		0.00
21.02	Consider (11.003 programmer - V.Basic)		0.00
	Consider (11.002 programmer - PHP)		0.00
	Diligent (11.002 programmer - FRF)		0.00
	Energen (11.003 programmer - V.Basic)		0.00
	Eager (11.001 programmer - C++)		0.00 -
	Edger (15.001 dridiyst)		0.00 👻
	OK Cancel		

- Remove the tick from the check box **Offer only used resources for selection** to view all teams from the resource pool in the list.
- You can mark the check box **Roles** and transfer all teams to the view Team usage. **Alternatively**, you can mark only selected teams.
- Click on the button **OK**.
- Select a team which you want to assign activities to in the table of the view Team usage. The tab **Activities** in the window Resource properties lists activities from the project schedule.

RB 🧀 🗔	5 Č Ŧ	TEAM USAGE						2016_2_5	soft							- 🗆 ×
FILE	START PROJECT Variance analysis Network diagram Gantt-network chart	FORMAT	le 🏭	Employee Machine	h Resource ☆ Cost char → Gantt cha	chart • • rt	* Save I Hanage	Project Reso	urce	25×	50× 75× 10	200× Activity × the Subprojection	t - Structure	H. ▼ H. ⊼ K	▲ ▼ ▼ ◆ ▼	Cutoff date Current date Project start •
A	 Activity views	Resource views	Cap	oacity views	Additional	view	User views	Properties	s	Sch	nedule	Insert	Outlin	ie Ed	lit	Scrolling
	Cutoff date: 03.02.1	16 00:00	~~	•	F	ebruary 2	016	•				March 2016			•	^
				05	06		07	08	09		10	11	12	13		14
Nr.	Name		Effort	40	107		142	41	110		107	103	140	63		
⊟ 11.001	North - Team A 🦰		84	24	24		21		10		5					
1.1.2	system test planning		31'		system	test plar	ning									
1.1.4	software transition p	lanning	17'		sof	tware tra	Insition planni	ng								
1.2.3	software developme	nt library	21'				software	developmen	it library							
1.3.3	system requirements	S	15'								system	requirements				
± 12.001	South		157				29	11	10		40	40	27			
± 13.001	East		196		33		46	15	21		5	22	33	21		
± 14.001	West		416	16	50		46	15	69		57	41	80	42		
4																~
	1.001 Name: North -	TeamA												Ca	ode:	
Activitie	s Team Tear	n members														
Nr.	Name		Sub	project		Duration	Start 🔻	Finish	0	A	Capac	Utilizat Effort	Notes			ОК
1.1.2	system test p	anning	proj	ect planning	and oversight	31	03.02.16 08:00	08.02.16 1	6:00 100	200						Cancel
1.1.1	software dev	elopment planning	proj	ect planning	and oversight	16	03.02.16 08:00	04.02.16 1	7:00 100	200						
1.1.4	software tran	sition planning	proj	ect planning	and oversight	17	08.02.16 16:00	10.02.16 1	7:00 100	200						
1.1.3	software insta	allation planning	proj	ect planning	and oversight	34	08.02.16 16:00	15.02.16 0	9:00 100	200					_	
122	tollowing and	updating plans	proj	ect planning i bliebing a col	ana oversight tware dev	21	16.02.16.09:00	18.02.161	1:00 100	200					-	
Only a	ssigned activities															
RESOURCE	POOL: http://localhost/	′ris6/21	ST	RUCTURE: Te	am									WEEK 1:3		- + .::

- Mark the check boxes of the activities.
- Among others, you can define the team usage and effort for an activity.
- Mark the check boxes of the activities.
- Click on the button **OK**.

Team properties during assignation

During the assignation you can refine team properties by controlling and defining the following values for each activity:

- · Readiness of a team
- · Availability of a team
- · Capacity of a team
- Usage of a team
- Effort of a team
- Notes concerning a team.

Activity selection

During the assignation you can determine the activity list by activating /deactivating the following options:

• Assigned activities only lists only assigned activities.

Activities at a specific date

You can filter activities that are due at a specific date. If you leftclick on a cell showing the result from the row Team and column Date, you will only receive the displayed activities that were defined for this particular time period.

RE 🧀	507	TEAM USAGE						2016_2_soft								- 0	×
Columns	SIARI PROJECT	FORMAI Role Teams Employee	Cus Not Other 1	tom fields es & links Fooltips 🔻	☐ Maximum Effort Average	 □ Project ✓ Project ✓ Cutoff 	start ⊻ Curren end ⊻ Milest date □ Resen	nt date one in calendar ve time	□ Criti	ical path els	✓ Total u ✓ Activit	utilization y yee	Period	 Activitys in a row Group by team 			~
	Data	To	oltips		Resource units				Show					Group			
	Cutoff date: 03.02.16	00:00	~~	05	Fe	bruary 2016	7	18 (0	1	Ma	rch 2016	12	13	•		
Nr.	Name		Effort	40	107	1	12	11 1	9	10	07	103	14	13	14		
FI 11.001	North - Team A		84	24	24	2	1	1	0	5	5	105	14	, 03			
± 12.001	South		157			2	9	11 1	0	4	-	40	27				
13.001	East		196		33	4	6	15 2	1	5	5	22	33	21			
⊒ 14.001	West		416	16	50	4	6	15 6	9	5	7	41	80	42			
1.1.1	software development	planning	16'	S 📰	oftware develop	ment plan	ning										
1.1.3	software installation pla	anning	34'			softw	vare installatio	n planning									
1.1.4	software transition plar	nning	17'		soft	ware trans	ition planning										
1.2.1	software engineering e	environment	40'				SC	ftware enginee	ring en	vironme	nt						
1.2.2	software test environm	ent	16'				software tes	t environment									
1.2.5	non-deliverable softwa	re	15'					no no	1-delive	erable so	ontware						
1.3.1	analysis of user input		38'						anaiy	ISIS OF US	ser input	concept					
1.3.2	operational concept		27'								operational	concept					•
Activiti	14.001 Name: West													Code:			
Nr	Name			Subproject		Duration	Start 🔻	Finish	0	A Ca	anac Utiliz	at Effort	t Notes			OK	
1.1.3	3 software installa	tion planning		project plan	ning and oversight	34	08.02.16 16:00	15.02.16 09:00	100	200		2101			-11 7	Cancel	
1.1.5	5 following and up	odating plans		project plan	ning and oversight	10	15.02.16 09:00	16.02.16 11:00	100	200						Cancer	
1.2.2	2 software test en	ivironment		establishing	a software dev	16	16.02.16 11:00	18.02.16 11:00	100	200							
1.2.1	I software engine	ering environmen	t	establishing	a software dev	40	16.02.16 11:00	23.02.16 11:00	100	200							
1	s sottware develo	ipment library		establishing	a software dev	21	16.02.16 11:00	18.02.16 17:00	100	200							
	assigned activities	6.04	~														
RESOURC	E POOL: http://localhost/ris	6/21	51	RUCTURE: I	eam									He WEEK1:3			* .d

5.3.5 Team View Resource Properties

If you click on a row in the table at a team view, you can display detailed information about the team resource in the properties window.

R 🖬 🧀	¢ 🖯 🦻	¢ 🗆 "	TEAM USAGE							E	Building p
FILE	START	PROJECT	FORMAT								
Gantt chart	en Network	: diagram etwork chart	⊙ Time ♣ª Effort ₽= Cost	Emplo	yee Role	Employee	.⊪ Resou ☆ Cost ci ⊂ Gantt	rce chart * hart * chart	Save	E Pr	oject esource fo
	Activity view	WS	Variance analysis	Re	source views	Capacity views	Additio	nal view	User views	Prop	perties
	Cuto	5 date: 08.05.1	23 08:00	~~	V 1	lay 2023					June
					19	20	21	22		23	2
Nr.	Name	V.		Effort		24	128	80		120	12
∃ 11.00 ⁺	1 North -	TeamA		176			8	40		40	4
∃ 12.00	1 South			208			48	40		40	4
3.3	Building	g planning pr	esentation	48'				Bu	ilding planni	ng pres	entation
3.5	Setting	up the projec	t monitoring	40'				Setti	ng up the pr	oject mo	nitoring
3.7	Comple	ete the reque	stlist	80'							
5.5	Briefing	at start of co	nstruction	40'							
⊞ 14.00 ⁻	1 West			216		24	72			40	4(

The Team information can be followed on the following tabs:

- Activities
- Team

• Team members

Activities

Land Land Land Land Land Land Land Land										Co	ode:	
vr. Name	Subproject	Fixed	Duration	Start 👻	Finish	On-call	Availability	Capacity	Utilization	Effort	Notes	
1.1 Cost estimate	Phase 1	Duration	8	08.05.23 08:00	08.05.23 17:00	100	400					
3.1 Create the order plan	Phase 2	Duration	40	10.05.23 08:00	16.05.23 17:00	100	400					
1.2 Project procedure	Phase 1	Duration	80	10.05.23 08:00	23.05.23 17:00	100	400					
1.3 Completing the construction schedule	Phase 1	Duration	64	17.05.23 08:00	26.05.23 17:00	100	400					
3.2 Planning the design phase	Phase 2	Duration	32	23.05.23 08:00	26.05.23 17:00	100	400					
3.5 Setting up the project monitoring	Phase 2	Duration	40	24.05.23 08:00	30.05.23 17:00	100	400					
	DI 0	· · ·	0.0	04.05.00.00.00	00.00.00.47.00	100	100					•

Information about the activities is available here.

The option Only assigned activities reduces the activity list to the activities that have already been assigned.

Team

Pr	opertie 12.0 Activities	2S 01 Name: South Team Team	members							Code:	
										Resource pool	ОК
	Nr.	Working group	Code	Team	Calendar	Non-working days	Capacity type	Capacity	Costs	Notes	Cancel
	12.001	South					Medium	4	180.00		
											 Help

On the tab, you can see the properties of the team entered in the resource pool.

Team members

operti	es										
12	001 Name:	South							Code:		
Activities	Team	Team men	bers								
									Resource pool		(
Nr.	Name	Code	Calendar	Non-working days	Working group - team	Role - qualification	Productivity	Costs	Notes		Ca
12.01	Superman		2 all 45-hour work week	04.01.16-05.01.16/V;07.01.16-08.01.16;29	12.001 South	13.001 manager	100	50.00			
15.01	Goeslike			04.01.16-05.01.16/V;09.02.16-12.02.16;29	12.001 South	16.001 support	100	40.00			
15.02	Goeslike			04.01.16-05.01.16/V;09.02.16-12.02.16;29	12.001 South	12.001 writter	100	40.00			
18.01	Slow			07.01.16-08.01.16;11.01.16;01.02.16-05.02	12.001 South	11.001 programmer - C++	100	50.00			
21.01	Consider			01.12.10-02.12.10;04.01.16-05.01.16;21.01	12.001 South	11.002 programmer - PHP	100	40.00			
21.02	Consider			01 10 10 00 10 10 04 01 10 05 01 10 01 01	12 001 Carth	11.002 omgrommer V/Po	100	40.00		T	

The tab lists other employees with their properties from the resource pool who belong to the same team.

Vorgänge zu bestimmtem Datum

R 🧀 🗇	🗄 🕽 ¢ 🗖 "	TEAM USAGE							Βι
FILE	START PROJECT	FORMAT							
	Network diagram	🕒 Time		Role	Employee	. Resource	chart *	tave	📄 Pro
Gantt	Gantt-network chart	Seffort ====================================	Employ	yee	* Machine	Gantt cha	rt ≖ art	I 📩 Man	age 🔠 Res w = 🚹 Infi
A	ctivity views	Variance analysis	Res	source views	Capacity views	Additional	view	User vie	ews Prope
	Cutoff date: 08.05.	23 08:00	<<	M 19	ay 1023 20	21	22	2	23
Nr.	Name		Effort		24	128	80		120
11.001	North - Team A		176			8	40		40
1.4	Create task lists		136'						
5.4	Deadline monitoring)	40'						
	South		208			48	40		40
	West		216		24	72			40

You can filter out activities that are due on a certain date. If you click with the left mouse button on a cell which is a result of the team line and the date column, you will only get the activities that are in question for the selected period.

PI	opertie	es												
-	11.0	01 Name: North - Team A										Code		
ſ	Activities													
	Nr.	Name	Subproject	Fixed	Duration	Start 👻	Finish	On-call	Availability	Capacity	Utilization	Effort	Notes	ОК
														Cancel
														Help
	✓ Only assi	igned activities												

5.3.6 Assign activities to an employee in the Human resource capacity planning

Important! You should already have the following completed:

- Set up employees in the resource pool and describe them with roles.
- Assign the roles to the activities.

In order to assign activities to employees, do the following:

- 1. Select the menu item **Start > Capacity views > Employee**.
- 2. Mark unhide employees in the Human resource capacity planning to display employees.
- 3. Select the employee who you want to assign activities to. The tab **Activities** in the window Resource properties lists activities from the project schedule.

Tip If you have the option Activities with matching role only activated, the employees will be offered only activities, which this role has been assigned.

R 🗀 E	5 🗟 🗆 🕫	HUMAN RESO	URCE CAPACITY PL	ANNING					2016_2_soft						-	□ ×
FILE	START PROJECT		FORMAT													^
Columns	A Z Sort Renumber Excel	Role Teams Employee	Custom field Notes & links Other Tooltips	s The Ma	ort E	⊇ Proj 2 Proj 2 Cut	ect start ⊻ ect end ⊻ off date □	Current date Milestone in cale Reserve time	□ Critical pat ndar ☑ Labels	th 🗹 To V Ac V En	tal utiliza tivity nployee	ation 🗹 Perio	d 🗌 Act	ivitys in a row oup by role		
	Data	Т	ooltips	Resour	ce units				Show					Group		
		Cutoff date: 03.02	.16 00:00			~~	V	Feb	2 uary 2016	•				March 2016		
							05	06	07	08		09	10	. 11	12	
Nr.	Name	1	Status	Effort B	Sho	tfall	96 -24	114 +291	202	88 +309		159 +206	172 +193	122 +243	173 +192	
	programmer - C++			243			+48	33 +96	51 +36	15 +92		31 +50.5	37 +51	22 +70	33 +43.5	
	programmer - PHP			76	-11 (1	4%)	+24	+40	29 +1	47 +18		+30	+12	+21	+20	
± 11.003	programmer - V.Basi	•		143			+48	+47	55 +68	11 +49		+49.5	28 +48	19 +58	20 +43.5	
⊟ 13.001	manager			96			16 +11	+45	+45	+45		29 +16	17 +28	+45	13 +32	
1.1.1	software development	t planning		16' -1	16		SC SC	ftware developm	ient planning							
1.3.1	analysis of user inpu		3	19' -1	19						Į	analysis	of user in	put		
1.3.2	operational concept			27' -2	27								opera	tional concept		
1.11	software product eva	uation		34' -3	34											
12.01	Superman	-					27	45	45	45		45	45	45	45	
	designer			227	-32 (1	4%)	-24	24 +7 57	+18	+36		29	+16	+9	40	
	analyst			350	-31 (9%)	40	+16	-5	+29		+20	+6	+40	+40	•
4	3															P
4 /	12.01 Name: Superm	an												Code:		
Activiti	es Employee C	alendar Tea	am members													
Nr.	A Name		Subproject		Duratio	n	Start 🔹	Finish	Role	Bala	On /	Availa Pr	Util A	Effort Notes		к
0.1.1.1	software deve	lopment planning	project planning a	and oversigh	t 1	6 03	.02.16 08:00	04.02.16 17:00	13.001 manager	-16	100	100			Car	ncel
	analysis of us	er input	system requireme	nts analysis	1	9 01	.03.16 11:00	03.03.16 15:00	13.001 manager	-19	100	100				
	software prod	uct evaluation	software develop	ment proc	3	4 24	03 16 11:00	30 03 16 14:00	13.001 manager	-27	100	100			-	
	bonnaio prod		unitare develop	mont proo				00.00.10 14.00	10.001 Managor		100	100		5		
	3														-	
🗌 Only a	assigned activities	Only a	activities with match	ing role												
RESOURC	E POOL: http://localhost/	is6/21	STRUCTURE	: Role > Em	iployee							E	📑 🔜 v	/EEK1:3		- + .::

- 4. Mark the check boxes of the activities.
- 5. Among others, you can define the employee workload for an activity.
- 6. Mark the check boxes of the corresponding activities.
- 7. Click on the button **OK**.

Employee properties during assignation

During the assignation you can refine role properties by controlling and defining the following values for each activity:

- Readiness of an employee
- Availability of an employee
- Productivity of an employee
- Workload of an employee
- Absence of an employee
- Effort of an employee
- Notes concerning an employee.

Activity selection

During the assignation you can determine the activity list by activating /deactivating the following options:

- Assigned activities only lists only assigned activities.
- Activities with matching role only is important for employee assignation. It lists only activities, to which a role executed by an employee, has already been assigned.

Activities at a specific date

You can filter activities that are due at a specific date. If you leftclick on a cell showing the result from the row Resource and column Date, you will only receive the displayed activities that were defined for this particular time period.

R 🗀 .	5 े 🗆 🕫	HUMAN RES	OURCE CAPACITY F	PLANNING	5				20	016_2_soft							-	□ ×
FILE	START PROJECT		FORMAT															^
Columns	Sort Renumber Excel	Role Teams Employ	☐ Custom fiel ☑ Notes & lin ee Other Tooltips	ds 🚡 ks 📕	Maximum Effort Average	☐ Proj ✓ Proj ✓ Cut	ject st ject er off da	art	it date one in calendar e time	 Critical path Labels 	✓ To ✓ Ac	tal utilizi tivity nployee	ation 🗹 P	eriod	Actin Grou	vitys in a row up by role		
	Data		Tooltips	Res	ource units					Show					C	Group		
	с	utoff date: 03.0	2.16 00:00			~<	•		February 2	2016	•	1				March 2016		A
No	News		Chatra	5 44 +		Ch - 46-11		96	06	07	08		09	-	10	11	12	
NF.	Name		status	242	D	Shortrall		-24	+291 33	51	+309	1	+206	•	193 37	+243	+192	
□ 11 002	programmer - PHP			243	-1	1 (14%)		+48	+96	+36 29	+92	-	+50.5		+51	+70	+43.5	
1.2.1	software engineering	environment		40'	0	,		+24	+40	+1	softwa	are engi	+30 neering er	Ivironm	ent	+21	+20	
1.2.4	software development	files		36	-36							softwa	re develop	ment fil	es			
14.02	Diligent							12	20	29.5	38		15		6	10.5	10	
21.01	Consider							12	20	0.5	27		15		6	10.5	10	
± 11.003	programmer - V.Basic			143				+48	+47	55 +68	11 +49		+49.5		28 +48	19 +58	20 +43.5	
	manager			96				16 +11	+45	+45	+45		29 +16		17 +28	+45	13 +32	
	designer			227	-3	2 (14%)		40 -24	24 +7	29 +18	+36		29		32 +16	1 +9	40	
	analyst			350	-	31 (9%)		40	5/ +16	38 -5	+29		60 +20		+6	40 +40	40 +40	
	support			75				+24	+40	+40	+40		+40		+32	40	+13	
																		▼
							_											7
	1.002 Name: programm	ner - PHP														Code:		
Activiti	es						_											ок
Nr.	Name		Subproj	ect		Durati	on	Start 🔹	Finish	Role		Quantity	Utilizat	Effort	Notes			
1.2.1	software engine	eering environm	ent establish	ning a soft	ware dev		40 1	6.02.16 11:00	23.02.16 11:00	11.002 program	nmer	1	100	40			C	ancel
⊻ 1.2.4	software devel	opment files	establish	ling a som	ware dev		36 2	2.02.16.08:00	26.02.16 12:00	11.002 program	nmer		100	36				
																	_	
	animand activition																-	
⊡ Only a	ssaigned activities																	
RESOURC	E POOL: http://localhost/ri	\$6/21	STRUCTUR	E: Role >	Employee								1	=	we	FFK 1 : 3		- +

5.3.7 Assign activities to an employee in the view Employee

Important! A project schedule, which includes activities and the employees required in the resource pool should already been set up.

In order to assign activities to employees, do the following:

- Select the view **Start > Resource views > Employee**.
- Select the menu item **Start > Edit > Filter**.

The dialogue box **Filter** opens.

R Filter			×
Project			
Project / Subproject: 2016.2	2 soft		-
Period			
□ Peri 03.02.16 💌 00:00			
to: 05.04.16 - 14:00			
Activity			
Hide completed activities			
Deserves			
Resources			
Show only overloaded res	ources		
Only already planned reso	urces to choose from offer		
Nr.	Name	Code	Costs
Roles			
15.001	analyst		70.00
14.001	designer		60.00
13.001	manager		60.00
11.001	programmer - C++		50.00
11.002	programmer - PHP		45.00
11.003	programmer - V.Basic		50.00
16.001	support		30.00
12.001	writter		30.00
Teams			
13.001	East		0.00
	North - Team A		0.00
12.001	South		0.00
14.001	West		0.00
Employee			
21.02	Consider (11.003 programmer - V.Basic)		0.00
21.01	Consider (11.002 programmer - PHP)		0.00
	Diligent (11.002 programmer - PHP)		0.00
	Diligent (11.003 programmer - V.Basic)		0.00
	Eager (11.001 programmer - C++)		0.00
□17.01	Eager (15.001 analyst)		0.00
	OK Cancel		

- Remove the tick from the check box **Offer only used resources for selection** to view all employees from the resource pool in the list.
- You can mark the check box **Employees** and transfer all employees to the view Employee workload. **Alterna-***tively* you can mark only selected employees.
- Click on the button **OK**.
- Select the employee which you want to assign activities to in the table of the view Employee workload. The tab **Activities** in the window Resource properties lists activities from the project schedule.

Tip If an employee has several roles, the activity will be shown as many times as the number of roles the employee has. For instance, Mr Ordentlich can work as mechanic, which means all activities will be listed twice, so as to allow him to be assigned to one activity under several roles.

RE 🧀 .	<u>।</u> २ ८ वि र	EMPLOYEE	USAGE						20	016_2_soft										-	□)	×
FILE Columns	START PROJECT	FORMA	AT □ Cus ☑ Not yee Other 1	tom fie es & lii Fooltip	elds 🔠 nks 🛃 s 🔹 🎎	Maximum Effort Utilization	由 Average	 □ Project ✓ Project ✓ Cutoff 	start . end . date .	Current date Milestone in cal Reserve time	lendar 🗹	Critical pat	:h ☑ T ☑ A □ E	otal util ctivity mploye	ization	n 🗆 F	Period	□ Ac	ctivitys in roup by (a row employee		^
	Data		Tooltips			Resource	units				Sł	iow							Group	þ		
				7				-											•			
	Cutoff date: 03.02.16	6 00:00	<<			Februa	ry 2016			1		March 2	016								April	
				05		06	07	08		09	10	1	1	1	2		13		14		15	
Nr.	Name		Effort	40		107	181	52		120	135	1:	22	16	50		63					
	Superman		0																			
± 13.02	Tidy		0																			
± 14.02	Diligent		40				29	11														
⊞ 15.01	Goeslike		75								8	4	0	2	7							
■ 16.02	Sleeper 📕		180			17	29	11		29	32		1	4	0		21					
1.1.4	software transition pla	anning	17			software	e transition pl	anning														
1.2.1	software engineering	environment	t 40					soft	vare en	gineering enviro	onment											
1.3.1	analysis of user input		19							analysis	of user i	nput										
1.4	system design		42								sy	stem desig	jn									
1.9	system qualification to	esting	28												syste	em qu	alifica	tion tes	sting			
1.11	software product eval	uation	34														sof	tware p	oroduct	evaluation	(
	Eager		84	24		24	21			10	5											▼
4																						_
	16.02 Name: Sleeper																	Code	a:			
Activitie	es Timesheets	Employee	Calendar	Т	eam membe	ers																
Nr	Name		Subproject			Duration	Start	▼ Fir	nish	Bole	Bala	On-call	Availa	Pr	Uhil	Α	Effort	Notes		0	ĸ	
			sector alana		d au ami abt	21	02 02 16 09 0	0 00 02	16 16:00	14 001 designer	Daia .	01 67	100		0	A	LIGIT	Notes	_			
	software devel	looment pla	project plann	ning and	d oversight	16	03.02.16.08.0	0 00.02	16 17:00	14.001 designer		6 0	100			1			_	Car	icel	
1.1.3	3 software instal	lation plann	project plann	ning and	d oversight	34	08.02.16 16:0	0 15.02.	16 09:00	11.001 programm	n	0 100	0									
☑ 1.1.4	software transi	tion planning	project plann	ning and	d oversight	17	08.02.16 16:0	10.02.1	16 17:00	14.001 designer		0 100	0	100	100		17					
1.2.1	I software engin	eering envi	establishing a	a softw	are dev	40	16.02.16 11:0	0 23.02.	16 11:00	11.001 programm	n	0 100	0						_			
123	software deve	looment libr	establishing :	a softw	are dev	21	16.02.16.11-0	18 02	16 17:00	11.001 programm	n	0 100	0						T			
Only a	assigned activities	⊡ 0r	nly activities v	with mat	tching role																	
										_			_									
RESOURCI	E POOL: http://localhost/r	156/21	ST	RUCTU	JRE: Employ	yee										11.	WEEK 1	1:3				

- Mark the check boxes of the activities.
- Among others, you can define the employee workload for an activity.
- Mark the check boxes of the activities.
- Click on the button **OK**.

Employee properties during assignation

During the assignation you can refine role properties by controlling and defining the following values for each activity:

- Readiness of an employee
- Availability of an employee
- Productivity of an employee
- Workload of an employee
- Absence of an employee
- · Effort of an employee
- Notes concerning an employee.

Activity selection

During the assignation you can determine the activity list by activating /deactivating the following options:

- Assigned activities only lists only assigned activities.
- Activities with matching role only is important for employee assignation. It lists only activities to which a role executed by an employee has already been assigned.

Activities at a specific date

You can filter activities that are due at a specific date. If you leftclick on a cell showing the result from the row Employee and column Date, you will only receive the displayed activities that were defined for this particular time period.

R 🧀	🖥 🔿 🔿 🗖 🕫	EMPLOYEE USAGE					20	16_2_soft								-	□ ×
FILE	START PROJECT	FORMAT															^
Columns	A Z Sort Renumber Excel	□ Role □ Cus □ Teams ☑ Not □ Employee Other	tom fields tes & links Fooltips 👻	Maximum Effort Utilization	db Average	 Project ✓ Project ✓ Cutoff 	start ⊻ end ⊻ date □	Current date Milestone in calen Reserve time	□ (dar ⊻ L	Critical path abels	✓ Tot ✓ Act	al utilizati ivity ployee	on 🗆 I	Period	☐ Activitys in ☑ Group by	n a row employee	
	Data	Tooltips		Resource	units				Sho	w					Grou	ıp	
			,			-									•		
	Cutoff date: 03.02.16	<< 00:00		Februar	ry 2016					March 201	6			1			April
			05	06	07	08	_	09	10	11		12		13	14		15
Nr.	Name	Effort	40	107	181	52		120	135	122		160		63			
	Superman	0															
	Tidy	0															
	Diligent	40			29	11											
⊞ 15.01	Goeslike	75				<i>[</i>			8	40		27					
⊞ 16.02	Sleeper	180		17	29	. 11		29	32	1		40		21			
	Eager	84	24	24	21			10	5								
± 18.01	Slow	82			29	11		10	32					~			
± 19.01	Fast	155	40	33	1/	4		21	5	22		33		21			
± 20.02	Think Consider	230	16	33	1/	4		40	25	40		40		21			
±21.02	Consider	127			39	11		10	28	19		20					
																	-
																	•
<u> </u>	17.02 Name: Eager														Code:		
Activit	ties																
																	ж
Nr.	Name	Subproject		Duration	Start	▼ Fini	ish	Role	Bala	On-call A	vaila I	Pr Util	A	Effort 1	Notes 🔺		
1.1.	.3 software installa	tion plann project plann	ning and oversight	t 34	08.02.16 16:0	0 15.02.1	6 09:00	15.001 analyst	0	100	0					Ca	ncel
01.12	.3 software installa	tion plann project plann	ning and oversight	t 34	08.02.16 16:0	0 15.02.1	6 09:00	11.001 programm	0	100	0						
1.2.	2 software test en	vironment establishing	a software dev	16	16.02.16 11:0	0 18.02.1	6 11:00	15.001 analyst	0	100	0						
12	3 software develo	pment libr establishing oment libr establishing	a software dev	21	16.02.16 11:0	0 18.02.1 0 18.02.1	6 17:00 6 17:00	11.001 programm	-21	100	0	100 100	,	21			
□12	1 software engine	erina envi establishina	a software dev	40	16.02 16 11-0	0 23.02.1	6 11:00	11 001 programm	0	100	n	100 100			•		
🗌 Only	r assigned activities	Only activities v	with matching role														
RESOURC	CE POOL: http://localhost/ris	6/21 ST	RUCTURE: Emplo	oyee								E		WEEK 1			

5.3.8 Employee View Resource Properties

If you click on a row in the table at a employee view, you can display detailed information about the employee resource in the properties window.

R 🗀 🗇) 🖬 👂 🕈		EMPLOYEE US	AGE											Building) plar	ining	
FILE	START	PROJECT	FORMAT															
Gantt chart	 Network dia Gantt-netw Activity views 	agram ork chart	 Time Effort Cost Variance analysis 	Employ	ree Stranger	ole eam other * ws	An En	nployee achine ty views	.∥ Res ☆ Co ⊆ Ga Add	sour st ch ntt c ition	rce chart * nart * chart nal view	I Use	Save Manage Show * er views	E B Pro	Project Resource Info operties	×0	25× 50× 75	× 100×
	10	Cutoff date:	08.05.23 08:00			~		May 2	023				1				June 20	23
	1						19		20		21		22		23		24	
Nr.	Name 📏			Effort	Overlo	ad			24		128		80		120		120	
	Tidy, John			40														
⊡ 15.02	Goeslike			168							24		24		40		40	
3.3	Building pl	lanning pr	esentation	48									Buil	ding	planning p	rese	ntation	
3.7	Complete	the reques	stlist	80														Comple
5.5	Briefing at	start of co	nstruction	40														
± 16.02	Sleeper			152							32				40		40	
17.01	Eager			136							8		40		40		40	
± 20.02	Think			64					24		40							
± 21.02	Consider			40							24		16					

The employee information can be followed on the following tabs:

- Activities
- Employee
- Calendar
- Team members

Activities

Properti 15. Activities	CS 02 Name: Goeslike Timesheets Employe	e Calendar	- Team me	embers								Con	de:			
Nr.	Name	Subproject	Fixed	Duration	Start	-	Finish	Role	Balance	On-call	Availability	Productivity	Utilization	Ad Ab		Ж
2.3	Building planning presentation	Phase 2	Duration	48	24.05.23 08:00		31.05.23 17:00	12.001 writter	0	100	0	100	100		Car	ncel
☑ 3.7	Complete the request list	Phase 2	Duration	80	05.06.23 08:00		16.06.23 17:00	12.001 writter	0	100	0	100	100			
5.5	Briefing at start of construction	Phase 3	Duration	40	14.07.23 08:00		20.07.23 17:00	12.001 writter	0	100	0	100	100			
<u> </u>															He	ielp
✓ Only ass	igned activities	Only activities	s with matching r	ole											1	

In the No. column, you can assign the activities to the selected person by marking them.

This provides you with further information about the activities.

The option **Only assigned activities** reduces the activity list to the activities already assigned.

Only activities with matching role only those activities are listed to which a role exercised by the employee is already assigned.

In addition, you can refine the personnel characteristics in the table when making the assignment, by checking the following values for each activity:

- On-call of an employee
- Availability of an employee
- Additional utilization of an employee
- Negative effort of an employee
- Substitution for which employee

or define the following values:

- Productivity of an employee
- Utilisation of an employee
- Absence of an employee
- · Effort of an employee
- Notes of an employee.

Employee

Pro	perties												
•	15.02	Name: Goe	slike								Code:		
	Activities	Timesheets	Emplo	yee Cale	endar Team members								
											Resource pool		ОК
1	lr.	Name	Code	Calendar	Non-working days	Working group - team	Role - qualification	Productivity	Costs	Notes			Cancel
1	5.01	Goeslike			04.01.16-05.01.16/V;09.02	12.001 South	16.001 support	100	40.00			1	
	5.02	Goeslike			04.01.16-05.01.16/V;09.02	12.001 South	12.001 writter	100	40.00				
												1	Help
													Those

On the tab, you can see the characteristics of a human resource entered in the resource pool, including its professional qualifications.

Calendar

Properties	5					
L 15.02	Name: Goeslike				Code:	
Activities	Timesheets Employee	Calendar	Team members			
Nr.	Calendar / Activity	Week	Shift Source	Monday	8 hour 08:00-12:00;13:00-17:00	ОК
1	Standard	40 hour	8 hour	Tuesday	8 hour 08:00-12:00;13:00-17:00	Cancel
3.3	Building planning presentation		Project	Wednesday	8 hour 08:00-12:00;13:00-17:00	
3.7	Complete the request list		Project	Thursday	8 hour 08:00-12:00;13:00-17:00	
5.5	Briefing at start of construction		Project	Friday	8 hour 08:00-12:00;13:00-17:00	
	5			Saturday	0 hour	Help
				Sonday	0 hour	
4			•			

On the Calendar tab, you can see which calendars are used in the assigned tasks and how the working times are defined.

Team members

roperti	ies										
15	5.02 Name:	Goeslike							Code:		
Activities	s Timesheel	ts Em	ployee Calendar	Team members							
									Resource pool		ОК
Nr.	Name	Code	Calendar	Non-working days	Working group - team	Role - qualification	Productivity	Costs	Notes		Cancel
12.01	Superman		2 all 45-hour work week	04.01.16-05.01.16/V;07.01.16-08.01.16;29	12.001 South	13.001 manager	100	50.00			
15.01	Goeslike			04.01.16-05.01.16/V;09.02.16-12.02.16;29	12.001 South	16.001 support	100	40.00			
15.02	Goeslike			04.01.16-05.01.16/V;09.02.16-12.02.16;29	12.001 South	12.001 writter	100	40.00			Liele
18.01	Slow			07.01.16-08.01.16;11.01.16;01.02.16-05.02	12.001 South	11.001 programmer - C++	100	50.00			нер
21.01	Consider			01.12.10-02.12.10;04.01.16-05.01.16;21.01	12.001 South	11.002 programmer - PHP	100	40.00			
21.02	Consider			01 10 10 00 10 10 04 01 16 05 01 16 01 01	12.001 Couth	11 002 pmorement V/Pa	100	40.00		T	

The tab lists other team members of his team with their properties from the resource pool.

📧 🧀 🗇 🗔 Þ 🗢 🗖 " EMPLOYEE USAGE Building planning FORMAT START PROJECT 📲 Network diagram • Time 📴 Role Employee Resource chart * 📩 Save 📄 Project Activity -_ ¢ Gantt-network chart * Machine E Resource t- Subproj 🞎 Effort 😹 Team ∴ Cost chart * I 🔚 Manage Gantt Employee Je Cost ්න Link -Gantt chart f) Info chart 📑 Other 🔻 Show Additional view Resource views User views Properties Schedule Insert Activity views Variance analysis Capacity views 4 Cutoff date: 08.05.23 08:00 May 2023 June 2023 19 23 24 20 21 22 25 Effort 24 128 80 120 120 8 Nr. Name Overload ± 13.01 Tidy, John 40 ⊡ 15.02 Goeslike 168 24 24 40 40 Bu Iding planning presentation 3.3 Building planning presentation 48 Complete the reque 3.7 80 Complete the request list 5.5 Briefing at start of construction 40 **± 16.02** Sleeper 152 32 40 40 **⊕ 17.01** 136 40 Eager 8 40 40 8 ± 20.02 Think 64 24 40 ± 21.02 Consider 40 24 16

Activities on specific date

You can filter out transactions that are due in a certain period of time. If you click with the left mouse button on a cell that is a result of the employee row and the date column, you will only see the activities that come into question for the selected period.

roperti 15. Activities	CS 02 Name: G	oeslike											Code	e:]
Nr. 🗹 3.7	Name Complete the r	Subproject Phase 2	Fixed Duration	Duration 80	Start 05.06.23 08:00	•	Finish 16.06.23 17:00	Role 12.001 writter	Balance 0	On-call 100	Availability -100	Productivity 100	Utilization 100	Ad	Absences	Effort 80	OK
✓ Only ass	igned activities		Only activitie	s with matching	role												Help

5.3.9 Assign activities to a material in the view Material requirements

In order to assign activities to a material, do as follows:

- Select the view **Start > Resource views > Material requirements**.
- Select the menu item **Start > Edit > Filter**.

The dialogue box **Filter** opens.

RE Filter			X
Project			
Project / Subproject: 2016 2 s	soft		+
Deried			
renod			
Peri 03.02.16 • 00:00			
to: 05.04.16 💌 14:00			
Activity			
Hide completed activities			
Resources			
Show only overloaded resou	rces		
Only already planned resource	es to choose from offer		
Nr.	Name	Code	Costs
Material			
12.003	Metals - Spring steel		0.00
12.002	Metals - Stainless steel		0.00
12.001	Metals - Steel		0.00
13.001	Non-ferrous metals - Aluminium		0.00
13.003	Non-ferrous metals - Brass		0.00
13.002	Non-terrous metals - Copper		0.00
	OK Cancel		

- Remove the tick from the check box **Offer only used resources for selection** to view all materials from the resource pool in the list.
- You can mark the check box **Material** and transfer all materials to the view Material requirements. **Alternatively**, you can mark only selected materials.
- Click on the button **OK**.
- Select the material which you want to assign activities to in the table of the view Material requirements. The tab **Activities** in the window Resource properties lists activities from the project schedule.

RB 🧀 E	5 ° 🗆 🕫	MATERIAL RE	QUIREN	MENTS					2016_2	2_soft					- (□ ×
Columns	Sort Renumber Excel	FORI	e Othe	Custom fields lotes & links er Tooltips 🔻	d Maxim d Effort d Averag	num 🗆 P 🗹 P ge	roject start roject end utoff date	✓ Curre ✓ Miles □ Reser	ent date stone in calenda rve time	☐ Critical path r ☑ Labels	☐ Total utili ✓ Activity ☐ Employee	ization 🗌 Period	C Activitys	in a row		
	Data		Tooltip	5	Resource u	units				Show			Grou	ıp		
	Cutoff da	ite: 03.02.16 00:0	00		<< _			Februar	rv 2016	•		Mar	rch 2016			
Nr.	Name		Unit	Quan N	otes	05	06		07	08	09	10	11	12	13	_
	Metals - Steel		100	3			2		1							
	Metals - Stainless ste	el	100	3		1	1		1							
	Metals - Spring steel		50 kg	0												
± 13.001	Non-ferrous metals -/	Aluminium	1 kg	13							13					
	Non-ferrous metals -	Copper	10 kg	0												
± 13.003	Non-ferrous metals -	Brass 🔨	10 kg	0												
4																
- 222 1	3.002 Name: Non-ferr	ous metals - Cop	per											Code:		
A -41-01-	Metadal															
ACTIVITE	Material															2
Nr.	Name			Subproject		Duratio	n Start	*	Finish	Calculation	Amount	Notes			0	^
1.1.5	following and u	updating plans	ŗ	project plannin	g and oversigh	nt 1	0 15.02.16	09:00	16.02.16 11:00						Can	icel
1.2.2	software test e	environment	e	establishing a s	software dev	. 1	6 16.02.16	11:00	18.02.16 11:00							
1.2.1	software engin	eering environme	ent e	establishing a s	software dev	. 4	0 16.02.16	11:00	23.02.16 11:00							
1.2.3	software deve	lopment library	6	establishing a s	software dev	. 2	1 16.02.16	11:00	18.02.16 17:00	Hix	3					
125	non-deliverable	e software		establishing a s	software dev	. 3	5 26.02.16	13-00	01 03 16 11:00					•		
🗌 Only a	assigned activities															
	-															
RESOURCE	E POOL: http://localhost/r	is6/21		STRUCTURE:	Material							8	WEEK 1	L:3 •	- I	- +

- Mark the check boxes of the activities.
- Among others, you can define the material quantity for an activity.
- Mark the check boxes of the activities.
- Click on the button **OK**.

Material properties during assignation

During assignation you can refine material properties by controlling and defining the following values for each activity:

- Calculation of a material
- Quantity of a material
- Notes concerning a material.

Activity selection

During this assignation you can determine the activity list by activating /deactivating the following options:

• Assigned activities only lists only assigned activities.

Activities at a specific date

You can filter activities that are due at a specific date. If you leftclick on a cell showing the result from the row Material and column Date, you will only receive the displayed activities that were defined for this particular time period.

5.3.10 Material requirement Properties

If you click on a row in the table at a Material requirement view, you can display detailed information about the material requirement in the properties window.

R 🧀 🗇	🗄 🄈 🖒 🗔 "	MATERIAL RE	QUIRE	MENTS						Bui
FILE	START PROJECT	FORM	MAT							
Gantt chart	Network diagram Gantt-network chart	🕒 Time 🎎 Effort 🚅 Cost	Emp	loyee	Role Team Other *	4 *	Employee Machine	Resource chart Cost chart * Gantt chart	 T Save I Manage Show ▼ 	ा Project डा Resource € Info
А	ctivity views	Variance analysis	F	Resource	views	Ca	pacity views	Additional view	User views	Properties
	Cutoff c	late: 08,05 25 08:00)			~~	•	May 2023		1
Nr.	Name	1 U	Jnit	Quantity	Notes	_	19	20	21	22
<u> </u>	Metals - Steel	1	100	5			5			
Nr.	Project procedure	1	100	5					Project proc	edure
	Metals - Stainless st	eel 1	100	3			3			
	Metals - Spring steel	5	50 kg	2				2		
	Non-ferrous metals	- Aluminium 1	1 kg	7					7	

The machine type information can be tracked on the following tabs:

- Activities
- Material requirement

Activities

Material Material Mr. Name Subproject Fixed Duration Start Finish Calculation Ar	Code:	
Activities Material	and Mater	
Nr. Name Subproject Rixed Duration Start V Finish Calculation Ar	A Neter	- OK
	Iounit Notes	
L 1.1 Cost estimate Phase 1 Duration 8 08.05.23 08:00 08.05.23 17:00		Cancel
☑ 1.2 Project procedure Phase 1 Duration 80 10.05.23 08:00 23.05.23 17:00 Fix	5	
3.1 Create the order plan Phase 2 Duration 40 10.05.23 08:00 16.05.23 17:00		
1.3 Completing the construction schedule Phase 1 Duration 64 17.05.23 08:00 26.05.23 17:00		
3.2 Planning the design phase Phase 2 Duration 32 23.05.23 08:00 26.05.23 17:00		Help
3.3 Building planning presentation Phase 2 Duration 48 24.05.23 08:00 31.05.23 17:00		

In the No. column you can assign the activities to the selected material by selecting it.

More information about the activities is available here.

The option Only assigned activities reduces the activity list to the activities that have already been assigned.

Material

12.001	Name: Metals - Stee						Code:	
Activities	Material						Resource pool	ОК
Nr.	Material group	Code	Material type	Unit	Costs	Notes		Cancel
12.001	Metals		Steel	100 kg	0.00			
12.002	Metals		Stainless steel	100 kg	0.00			
12.003	Metals		Spring steel	50 kg	0.00			Help

You can see the properties of the machine type entered in the resource pool from the tab.

Activities on specific date

R 🗀 🗇	🖯 🗘 ¢ 🗔 "	MATERIAL RE	QUIR	EMENTS							E	Building plannii	ng	
FILE	START PROJECT	FOR	MAT											
Gantt chart	Network diagram Gantt-network chart	© Time ♣ Effort — Cost	Em	ployee	Role Team Other *		Employee Machine	. II Resource cha ☆ Cost chart * Gantt chart	art •	* Save	Project	0× 25× 50	IX 75× 100×	tan A tan S tan Li
A	ctivity views	Variance analysis		Resource	views	G	apacity views	Additional view	w	User views	Properties	Sche	dule	
	Cutoff	date: 08.05.23 08:00	0			<<	·	May 2023					June 20)23
Nr.	Name	1	Unit	Quantity	Notes		19	20		21	22	23	24	
□ 12.001	Metals - Steel		100	5			5							
1.2	Project procedure		100	5						Project pro	cedure			
± 12.002	Metals - Stainless st	teel	100	3			3							
□ 12.003	Metals - Spring stee	1	50 kg	2				2						
1.3	Completing the cons	struction sch	50 kg	2						Com	pleting the con	struction sche	dule	
□ 13.001	Non-ferrous metals	- Aluminium	1 kg	7						7				
1.4	Create task lists		1 kg	7										
± 13.002	Non-ferrous metals	- Copper	10 kg	6								6		

You can filter out activities that are due on a certain date. If you click with the left mouse button on a cell which is a result of the material line and the date column, you will only get the activities that are in question for the selected period.

Pi	operti	es											
*	13.	001 Name: Non-ferrous metals - Aluminium								Co	ode:		
ſ	Activities												014
	Nr.	Name	Subproject	Fixed	Duration	Start	•	Finish	Calculation	Amount	Notes] L	UK
	2 1.4	Create task lists	Phase 1	Duration	136	26.05.23 08:00		19.06.23 17:00	Fix	7			Cancel
													Help
	Only as:	igned activities											

5.3.11 Assign activities to a machine type in Machine types

Important! A project schedule, which includes activities and the roles required in the resource pool should already been set up.

In order to assign activities to a machine type, do the following:

- Select the view Start > Resource views > Machine types.
- Select the menu item **Start > Edit > Filter**.

The dialogue box **Filter** opens.

NE Filter			×
Project			
Project / Subproject: 2016_2_s	soft		*
Pariad			
Peri 03.02.16 • 00:00			
to: 05.04.16 - 14:00			
Activity			
Hide completed activities			
Resources			
Show only overloaded resou	rces		
Only already planned resource	ces to choose from offer		
Nr.	Name	Code	Costs
Teams			
13.001	East		0.00
11.001	North - Team A		0.00
12.001	South		0.00
Machine types	West		0.00
	Milling machine		90.00
12.001	Rotate machine		85.00
Machine			
12.01	machine 1		85.00
13.01	machine 2		90.00
	OK Cancel		

- Remove the tick from the check box **Offer only used resources for selection** to view all machine types from the resource pool in the list.
- You can mark the check box Roles and transfer all machine types to the view Machine type usage.

Alternatively ,you can mark only selected machine types.

- Click on the button **OK**.
- Select a machine type which you want to assign activities to. The tab **Activities** in the window Resource properties lists activities from the project schedule.

RB 🧀 E	५ े 🗌 र	MACHINE TYPE	ES USAGE						2010	6_2_soft							-	□ ×
FILE	START PROJECT	FORMA	T □ Cus ☑ Not	tom fields es & links	₩ Maximum	□ Proj ✓ Proj	ect start ect end	✓ Curr ✓ Mile	rent date estone in cale	endar 🗹	Critical path	 ✓ Total util ✓ Activity 	ization 🗌	Period	C Activitys	in a row by machine types		^
Columns	Sort Renumber Excel	Employee	Other T	ooltips 🔻	db Average	✓ Cute	off date	Res	erve time			Employe	2					
	Data	T	ooltips		Resource units					SI	how					Group		
				•				-								•		<u> </u>
	Cutoff date: 03.02.16 (00:00	<<		F	ebruary 20	016					March	2016					
				05	06		07	-	08	09	10)	11	12		13	4	
Nr.	Name		Effort		50		11		40	21	36	6	62					
□ 12.001	Rotate machine		139		50	1.50	11 ftware ii	nstallat	tion planning	1	16	;	62					
1.1.3	software installation pla	anning	34		soft	ware tra	insition r	lannin	a na	,								
1.1.4	software transition plan	ning	1/		Con		following	and u	odating plan	15								
1.1.0	upit testing	plans	21					g and a	pagang plan				unit testi	na				
1.0.2	unit integration and test	ting	26										unit intea	ration a	nd testing			
1.7	qualification testing	ung	20										qual	ification	testing			
□ 13 001	Milling machine		81						40	21	20							
124	software development	files	36						softw	rare dev	elopment files	5						
1.2.5	non-deliverable softwar	re	15							non-	deliverable so	ftware						
1.5	software requirements	analysis	30								S	oftware requ	irements	analysis	5			
																		-
4																		F
	2 004 NL Detets are	-blas																
W []	2.001 Name: Rotate ma	cnine														Lode:		
Activitie	es Machine types																	
N	News		C.4			Duration	0-4		Datab	M		Quant	a. Distant	Mataa			(ж
INT.	iname	-1	Juc	project	and associated	Juration	02 02 10	00.00	FILIST	100 10	actime type	Quant	ty Utilizat	. Notes			_	
	system test plan	ning oment planning	proj	ect planning ect planning	and oversight	16	03.02.16	08:00	04.02.16.17	00 12	001 Rotate mac						Ca	ncel
☑1.1.4	software transitio	on planning	proj	ect planning	and oversight	17	08.02.16	6 16:00	10.02.16 17	:00 12	.001 Rotate mac		1 100)				
☑1.1.3	software installa	tion planning	proj	ect planning	and oversight	34	08.02.16	6 16:00	15.02.16 09	:00 12	.001 Rotate mac		1 100)				
☑1.1.5	following and up	dating plans	proj	ect planning	and oversight	10	15.02.16	6 09:00	16.02.16 11	:00 12	.001 Rotate mac		1 100)				
123	software develo	nment lihrarv	eets	hlishinn a sr	ftware dev	21	16 02 16	<u>; 11-00</u>	18 02 16 17	-00 12	001 Rotate mac							
	assigned activities																	
RESOURC	E POOL: http://localhost/ris	6/21	ST	RUCTURE: N	lachine types										WEEK	1:3		- + .:

- Mark the check boxes of the activities.
- Among others, you can define the quantity, utilization and notes of a machine type for an activity.
- Mark the check boxes of the activities.
- Click on the button **OK**.

Machine type properties during allocation

During the allocation you can refine role properties by controlling and defining the following values for each activity:

- Number of machine type
- Usage of machine type
- Notes concerning a machine type

Activity selection

During the assignation you can determine the activity list by activating /deactivating the following options:

• Assigned activities only lists only assigned activities.

Activities at a specific date

You can filter activities that are due at a specific date. If you leftclick on a cell showing the result from the row Machine type and column Date, you will only receive the displayed activities that were defined for this particular time period.

5.3.12 Machine types Resource properties

If you click on a row in the table at a machine type view, you can display detailed information about the machine type in the properties window.

🗈 🧀 ¢)日) ぐ 🗆 "	MACHINE TYP	ES USAGE							Buildi	ng planning	
FILE	START PROJECT	FORM	AT									
Gantt chart	Network diagram Gantt-network chart	🕑 Time 🎎 Effort 🚅 Cost	Employ	ee 🔀 Other 🔹	Employee Machine	.⊪ Resor	urce chart + chart + t chart	⁺ <mark></mark> Save I <mark></mark> Manag Show	ge 📰 Re	oject source o	0× 25× 50× 75× 100	Activity • • Subproject
,	Activity views	Variance analysis	Res	ource views	Capacity views	Additio	onal view	User view	rs Prop	erties	Schedule	Insert
				7							•	♦ 2023
	Cutoff date: 08.05.	23 08:00	<<	М	ay 2023					June	2023	
				19	20	21	2	2	23	24	4 25	26
Nr.	Name 🖌		Effort	24	64	120	8	0	56	12	0 88	40
⊡ 12.001	Rotate machine		296	24	64	88				40	40	40
1.2	Project procedure		80			Project	procedure					
1.3	Completing the cons	struction sch	64			••••	Completing	the constru	iction sche	dule		
3.2	Planning the design	phase	32				Planning the	design ph	ase			
5.1	Project reporting		120									Proje
□ 13.001	Milling machine		296			32	8)	56	80	48	
1.4	Create task lists		136								Create task	(lists
3.6	Project cost control		80						Project co	st contro	1	
5.2	Invoice verification		80								Inv	voice verification

The machine type information can be tracked on the following tabs:

- Activities
- Machine types

Activities

I 3001 Name: Milling machine Code; Activities Machine types Name: Subproject Fixed Duration Stat ▼ Finish Machine type Quantity Utilization Notes OK 2.2 Planning the design phase Phase 2 Duration 32 23.06.23.07.00 13.001 Milling machine Image: Control of the set of the	rope	erties												
Activities Machine types Nr. Name Subproject Fixed Duration Stat Finish Machine type Quantity Utilization Notes A set up the project monitoring Phase 2 Duration A set up the document control Phase 2 Duration A set up the document control Phase 2 Duration A set up the document control Phase 2 Duration A set up the document control Phase 2 Duration A set up the document control Phase 2 Duration A set up the document control Phase 2 Duration A set up the document control Phase 2 Duration A set up the document control Phase 2 Duration <	H	13.001 Name: Milling machine										Code:		
Nr. Name Subproject Fixed Duration Stat Finish Machine type Quantity Utilization Notes OK 12.2 Planning the design phase Phase 2 Duration 32 22.052.30 ft/20.01 Milling machine Image: Control of the state Image: Control of the state Cancel	Acti	ities Machine types												
□ 2.2 Planning the design phase Phase 2 Duration 32 22.05.22 08:00 12.001 Miling machine	Nr.	Name	Subproject	Fixed	Duration	Start 👻	Finish	Machine type	Quantity	Utilization	Notes			ОК
3.5 Setting up the project monitoring Phase 2 Duration 40 24 05 23 08:00 30.05 23 17:00 13.001 Milling machine 3.6 Project cost control Phase 2 Duration 80 24 05 23 08:00 06.05 23 17:00 13.001 Milling machine 1 100 3.3 Building planning presentation Phase 2 Duration 42 40 52 30 8:00 31.05 23 17:00 13.001 Milling machine 1 3.4 Set up the document control Phase 2 Duration 40 24 05 23 08:00 30.05 23 17:00 13.001 Milling machine 1 3.4 Set up the document control Phase 2 Duration 136 26 05 23 08:00 30.05 23 17:00 13.001 Milling machine 1 1.4 Create task lists Phase 1 Duration 136 26 05 23 08:00 19.06 23 17:00 13.001 Milling machine 1	3	2 Planning the design phase	Phase 2	Duration	32	23.05.23 08:00	26.05.23 17:00	13.001 Milling machine					_	Cancel
☑ 3.6 Project cost control Phase 2 Duration 80 24 05 23 08:00 05 06 23 17:00 13 001 Milling machine 1 100 □ 3.3 Building pleaning presentation Phase 2 Duration 48 24 05 23 08:00 31.05 23 17:00 13.001 Milling machine Image: Control of the cont	3	5 Setting up the project monitoring	Phase 2	Duration	40	24.05.23 08:00	30.05.23 17:00	13.001 Milling machine						
□ 3.3 Building planning presentation Phase 2 Duration 48 24.0523 08:00 31.0523 17:00 13.001 Milling machine □ 3.4 Set up the document control Phase 2 Duration 40 24.0523 08:00 30.0523 17:00 13.001 Milling machine □ 4.4 Create task lists Phase 1 Duration 136 26.0523 08:00 19.0523 17:00 13.001 Milling machine Help	☑ 3	6 Project cost control	Phase 2	Duration	80	24.05.23 08:00	06.06.23 17:00	13.001 Milling machine	1	100				
□ 3.4 Set up the document control Phase 2 Duration 40 24.05.23 08:00 30.05.23 17:00 13.001 Milling machine Help □ 1.4 Create task lists Phase 1 Duration 136 26.05.23 08:00 19.062.23 17:00 13.001 Milling machine 1 100 Help	3	3 Building planning presentation	Phase 2	Duration	48	24.05.23 08:00	31.05.23 17:00	13.001 Milling machine						
☑ 1.4 Create task lists Phase 1 Duration 136 26.05.23 0.00.0 19.062.23 17.00 13.001 Milling machine 1 100 ▼	3	4 Set up the document control	Phase 2	Duration	40	24.05.23 08:00	30.05.23 17:00	13.001 Milling machine						Help
	☑ 1.	4 Create task lists	Phase 1	Duration	136	26.05.23 08:00	19.06.23 17:00	13.001 Milling machine	1	100			-	Thep
			n n	n		05 00 00 00 00	40.00.00.47.00	40.004.000						

In the No. column you can assign the activities to the selected machine type by selecting it.

More information about the activities is available here.

The option **Only assigned activities** reduces the activity list to the activities that have already been assigned.

Machine types

Properties	;							
13.00	Name: Milling machine						Code:	
Activities	Machine types							_
							Resource pool	OK
Nr.	Machine groups	Code	Machine type	Unit	Costs	Notes		Cancel
13.001	Milling machine				90.00			
								Help

You can see the properties of the machine type entered in the resource pool from the tab.

Activities on specific date

R 🗀 🗇) 🖯 🤈 ¢ 🗖 "	MACHINE TYP	ES USAG	E						Buildi	ing plan	ning		
FILE	START PROJECT	FORMA	AT											
Gantt chart	Network diagram Gantt-network chart	🕑 Time 🎎 Effort 를 Cost	Employ	Role Team (ee Other •	Employee	. III Resource ☆ Cost cha Gantt ch	e chart * rt * art	Save I Manag	e Elia Res	oject source o	0× 25×	× 50× 75× 100×	tan Activit tan Subpr	.y * roject
4	Activity views	Variance analysis	Res	ource views	Capacity views	Additiona	lview	User views	Prope	erties	S	Schedule	Inse	rt
				/							•		•	2023
	Cutoff date: 08.05.	23 08:00	<<	М	ay 2023					June	2023			
				19	20	21	22	2	23	24	4	25	26	
Nr.	Name		Effort	24	64	120	80)	56	12	0	88	40	
⊡ 12.001	Rotate machine		296	24	64	88				40)	40	40	
1.2	Project procedure		80			Project pr	ocedure	_						
1.3	Completing the cons	struction sch	64			Cor	npleting	the constru	ction sche	dule				
3.2	Planning the design	phase	32			Pla	nning the	design pha	se					
5.1	Project reporting		120					V						Proje
⊡ 13.001	Milling machine		296			32	80		56	80)	48		
1.4	Create task lists		136									Create task I	ists	
3.6	Project cost control		80						Project cos	st contro	d I			
5.2	Invoice verification		80									Invo	ice verificat	tion

You can filter out activities that are due on a certain date. If you click with the left mouse button on a cell which is a result of the machine type line and the date column, you will only get the activities that are in question for the selected period.

	Ies 001 Name: Milling machine											Code:			
Nr. ☑ 3.6 ☑ 1.4	Name Project cost control Create task lists	Subproject Phase 2 Phase 1	Fixed Duration Duration	Duration 80 136	Start 24.05.23 08:00 26.05.23 08:00	Ŧ	Finish 06.06.23 17:00 19.06.23 17:00	Machine type 13.001 Milling machine 13.001 Milling machine	Quantity 1 1	Utilization 100 100	Notes			C	OK Cancel
✓ Only a	signed activities														Help

5.3.13 Assign activities to machines in the view Machine usage

Important! A project schedule, which includes activities and the machines required in the resource pool should already been set up.

In order to assign activities to a machine, do the following:

- Select the view **Start > Resource views > Machine**.
- Select the menu item **Start > Edit > Filter**.

The dialogue box **Filter** opens.

NE Filter			×
Project			
Project / Subproject: 2016_2_s	soft		*
Pariad			
Peri 03.02.16 • 00:00			
to: 05.04.16 - 14:00			
Activity			
Hide completed activities			
Resources			
Show only overloaded resou	rces		
Only already planned resource	ces to choose from offer		
Nr.	Name	Code	Costs
Teams			
13.001	East		0.00
11.001	North - Team A		0.00
12.001	South		0.00
Machine types	West		0.00
	Milling machine		90.00
12.001	Rotate machine		85.00
Machine			
12.01	machine 1		85.00
13.01	machine 2		90.00
	OK Cancel		

- Remove the tick from the check box **Offer only used resources for selection** to view all machines from the resource pool in the list.
- You can mark the check box Roles and transfer all machines to the view Machine usage.

Alternatively, you can mark only selected machines.

- Click on the button **OK**.
- Select a machine which you want to assign activities to in the table of the view Machine usage. The tab **Activities** in the window Resource properties lists activities from the project schedule.
| RB 🧀 . | 5 ে 🗌 ፣ | MACHINERY U | ISAGE | | | | | | | | | | | | 2 | 016_2 | _soft | | | | | | | | | | | | | | | | | | - 1 | | × |
|-----------------|------------------------------|-------------------------------------|-----------------------|-----------------------------|-----------------------|-------------|--------------------------|----------------|---------------------|------------------------|---------------------------|-------------------|-------------------|--------------------------|-----------------------------|-----------|--------------|--------------|-----------------|---------|---------|-------------------|------------------------------------|-------------|--------------|-------|-------------|-----------|-------------------|-----------------|----------------|------------|---------|---------|-----------|-------------|---------|
| FILE
Columns | Sort Renumber Excel | FORMAT
Role
Teams
Employee | Cus
Not
Other 1 | tom fi
es & I
Tooltij | ields
inks
ps 🔻 | аь
в | Maxir
Effort
Avera | mum
t
ge |

 | Proje
Proje
Cuto | ect si
ect e
off di | tart
nd
ate | ⊻ C
⊻ N
□ R | urrer
Ailest
eserv | it date
one in
e time | caler | ıdar | □ Ci
☑ La | ritica
abels | l patł | | Z Tot
Ad
Em | t al uti
tivity
ploye | lizati
e | on 🗌 | Pe | riod | |] Activ
] Grou | itys i
.p by | n a ro
mach | w
niner | y | | | | ^ |
| | Data | T | ooltips | | | Reso | ource | units | | | | | | | | | | Shov | v | | | | | | | | | | | Gro | up | | | | | | _ |
| | Cutoff date: 03.02.16 | 00:00 | << | 07 0
S 1 | 08 C
M . | 9 10
F W | 11
T | 12
F | 13
S | ebrua
14
S | ry 21
15
M | 016
16
T | 17
W | 18 1
T | 19 21
F S |) 21
S | 22
M | 23
T | 24
W | 25
T | 26
F | 27
S | 28 3
S | 29 (
M | 01 00
T V | 2 0 | 3 04
F F | 4 0:
S | 5 06
3 S | 07
M | 08
T | 09
W | 10
T | 11
F | 12 1
S | 13 1
S 1 | 14
M |
| Nr. | Name | | Effort | | 1 | 8 8 | | | | | 7 | 3 | | | | | 8 | 8 | 8 | 8 | 8 | | | 8 | 3 | 2 | 2 8 | | | 8 | 8 | 4 | | 8 | | | 8 |
| ⊟ 12.01 | machine 1 | | 53 | | 1 8 | 8 8 | | | | | 7 | 3 | | | | | | | | | | | | | | | | | | | | | | 8 | | f | 8 |
| 1.1.4 | software transition plar | nning | 17 | | | | soft | ware | tran | sitio | ı pla | inni | ng | | | | _ | | | | | | | | | | | | | | | | | | | | |
| 1.1.5 | following and updating | plans | 10 | | | | | | | | | to | llow | ing a | nd up | datin | g plai | ns | | | | | | | | | | | | | | | | | | | |
| 1.7 | unit integration and tes | ting | 26 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ⊡ 13.01 | machine 2 | | 81 | | | | | | | | | | | | | | 8 | 8 | 8 | 8 | 8 | oftw | aro d | 8 | 3 | 2 | 2 8 | | | 8 | 8 | 4 | | | | | |
| 1.2.4 | software development | files | 36 | | | | | | | | | | | | | | - | | | | 3 | UILW | areu | ever | | | livora | hla | softw | aro | | | | | | | |
| 1.2.5 | non-deliverable softwa | re | 15 | | | | | | | | | | | | | | | | | | | | | | | I-UCI | IVEIG | Die | SOILW | are | | | oftw | are r | equir | remo | en |
| • | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 1 | |
| Activiti | 1.2.4 Name: software | development file
m members | S | | | | | | | | | | | | | | | | | | | | | | | | | | | | Coo | de: | | | | | _ |
| Nr | Name | | c | uboro | iect | | | _ | Dur | ation | | Sta | rt | - | | Finish | | Mac | hine | type | | 4 | | hil | Notes | | | | | | | [| | | 0 | К | |
| 1.1.3 | software installa | tion planning | 0 | roiect | olann | ing and | overs | siaht | | 34 | 08 | B.02 | 16 16 | :00 | 15.0 | 2.16 0 | 9:00 | 12.0 |)1 ma | chine | 1 | | 0 | | | - | | | | | | | | | Can | | 7 |
| ☑ 1.1.5 | following and up | odating plans | p | roject | plann | ing and | overs | sight | | 10 | 1 | 5.02 | 16 09 | :00 | 16.0 | 2.16 1 | 1:00 | 12.0 |)1 ma | chine | 1 | | 0 | 100 | | | | | | | | | | ιL | Call | | |
| ☑1.7 | unit integration a | and testing | S | oftwar | e dev | elopme | nt pro | c | | 26 | 1 | 1.03. | 16 08 | :00 | 16.0 | 3.16 1 | 0:00 | 12.0 |)1 ma | chine | 1 | | 0 | 100 | | | | | | | | | | | | | |
| 1.6.2 | unit testing | ling | S | oftwar | e imp | ementa | ition a | n | | 31 | 1 | 1.03. | 16 08 | 00: | 16.0 | 3.16 1 | 6:00
c-nn | 12.0 |)1 ma | chine | 1 | 1 | 0 | | | | | | | | | | | | | | |
| 1.0 | qualification test | ung | 5 | Jitwai | e uev | ciopine | ant pro | · | | 21 | - N | 0.00. | 10 10 | .00 | 10.0 | 3.101 | 0.00 | 12.0 | // 1110 | Crime | _ | | 00 | | | | | | | | | | Ŧ | | | | |
| Only a | assigned activities | 🗹 Only i | activities v | vith ma | atchir | ig role | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| RESOURC | E POOL: http://localhost/ris | 6/21 | ST | RUCT | URE: | Machi | ne | | | | | | | | | | | | | | | | | | | | E | | 112 D | AY 1 | :1 - | - | | -1- | | - + | - 14 |

- Mark the check boxes of the activities.
- Among others, you can define the machine usage for an activity.
- Mark the check boxes of the activities.
- Click on the button **OK**.

Machine properties during assignation

During the assignation you can refine machine properties by controlling and defining the following values for each activity:

- Availability of a machine
- Usage of a machine
- Notes concerning a machine.

Activity selection

During the assignation you can determine the activity list by activating/deactivating the following options:

• Assigned activities only lists only assigned activities.

Activities at a specific date

You can filter activities that are due at a specific date. If you leftclick on a cell showing the result from the row Machine and column Date, you will only receive the displayed activities that were defined for this particular time period.

5.3.14 Machinery properties

If you click on a row in the table at a machine view, you can display detailed information about the machine in the properties window.

R 🧀 🕫	· 🖯 りぐ 🗆 "	MACHINERY U	ISAGE								Buildin	g planni
FILE	START PROJECT	FORMAT										
Gantt chart] Network diagram] Gantt-network chart	🕑 Time 🎎 Effort 를 Cost	Emplo	yee Cole	& Empl	oyee	. III Resource ☆ Cost cha Gantt ch	e chart * art * art	⁺ <mark></mark> Save I Manage Show ▼	ा≣ Pro ≣≣ Re €] Inf	oject source o	0× 25:
A	Activity views	Variance analysis	Re	source views	Capacity	views	Additiona	l view	User views	Prop	erties	5
	Cotoff date: 08.05.	23 08:00	<<	40	May 2023		24		•	22	June	2023
Nr	Name		Effort	24	40		40	40		16	8	•
□ 12.01	machine		200	24	40		16				4()
1.2	Project procedure		80				Project p	ocedure				
5.1	Project reporting		120									
± 13.01	machine 2		160				24	40		16	4()

The machine information can be tracked on the following tabs:

- Activities
- Machine
- Team members

Activities

ropertie	es										
12.	01 Name: machine 1									Code:	
Activities	Machine Team members										
Nr.	Name	Subproject	Fixed	Duration	Start 👻	Finish	Machine type	Availability	Utilization	Notes	OK
2 1.2	Project procedure	Phase 1	Duration	80	10.05.23 08:00	23.05.23 17:00	12.01 machine 1	0	100		Cancel
1.3	Completing the construction schedule	Phase 1	Duration	64	17.05.23 08:00	26.05.23 17:00	12.01 machine 1	0			
3.2	Planning the design phase	Phase 2	Duration	32	23.05.23 08:00	26.05.23 17:00	12.01 machine 1	0			
✓ 5.1	Project reporting	Phase 3	Duration	120	12.06.23 08:00	30.06.23 17:00	12.01 machine 1	0	100		
											Help
											· · ·
Only ass	igned activities 🗹 Or	nly activities w	ith matching	g role			1				

In the No. column, you can assign the activities to the selected machine by marking them.

This provides you with further information about the activities.

The option **Only assigned activities** reduces the activity list to the activities already assigned.

Only activities with matching role only those activities are listed to which a role exercised by the machine is already assigned.

Machine

Prope	12.01	Name: machine 1 Machine Team members						Code:]	
		L						Resource pool		ОК
Nr.		Machine name	Code	Working group - team	Machine group - Machine type	Costs	Notes			Cancel
12.01		machine 1			12.001 Rotate machine	85.00				
										Help
										Trop

On the tab, you can see the characteristics of a machine entered in the resource pool, including its machine type.

Team members

The tab lists other machines with their properties from the resource pool if the machines are grouped into a team.

Activities on specific date

💀 🧀 🍫 🖯 🏷 🦿 "	MACHINERY U	JSAGE					
FILE START PROJECT	FORMAT						
Gantt chart	⊙ Time ♣ª Effort ₽ Cost	Employ	yee Barrier Team	Employee & Machine	Resource ☆ Cost cha Gantt ch	e chart * art * aart	⁺ <mark> Save</mark> I <mark> Manage</mark> Show
Activity views	Variance analysis	Res	source views	Capacity views	Additiona	al view	User views
Cutoff date: 08.05.23	3 08:00	<<	Ma 19	ay 2023 20	21	22	2
Nr. Name		Effort	24	40	40	40	1
□ 12.01 machine 1		200	24	40	16		
1.2 Project procedure		80			Project pr	ocedure	
5.1 Project reporting		120					
13.01 machine 2		160			24	40	16

You can filter out transactions that are due in a certain period of time. If you click with the left mouse button on a cell that is a result of the machine row and the date column, you will only see the activities that come into question for the selected period.

Pr	opertie	es											
#	12.0	Name: machine 1									Code:		
	Activities												
	Nr.	Name	Subproject	Fixed	Duration	Start 👻	Finish	Machine type	Availability	Utilization	Notes	UK	
	2 1.2	Project procedure	Phase 1	Duration	80	10.05.23 08:00	23.05.23 17:00	12.01 machine 1	0	100		Cancel	
	🗆 1.3	Completing the construction schedule	Phase 1	Duration	64	17.05.23 08:00	26.05.23 17:00	12.01 machine 1	0				
												Help	
[Only assi	gned activities 🔽 Onl	y activities wit	h matching	role								

5.3.15 Resource utilization

Information about activities to which the resources have been allocated. In all views of Resource Usage, such as

- Role
- Team
- Employee
- · Machine types
- Machinery
- Material

you can view the activities that cause the utilization from the opened project as well as the portfolio.

In order to view an overview of the activities, do as follows:

• Click on a cell that shows the resource allocation. The window Object properties with the subordinated activities appears in the lower part of the program window.

RE 📁 .	5 ∂∓	EMPLOYEE USAG	SE											ne	ew_so	ftwa	are dev	elop	ment	proce	ess													-		×
FILE	START PROJECT	FORMAT	Cus	stom f tes &	field link	ls s	ت ا ت	Maximur Effort	n db	Ave	rage		Proj Proj Cuti	iect st iect er off da	art [nd [2 Ci 2 M	urrent (ileston	date ie in time	caler	[ndar [_ Crit ✓ Lab	tical p pels	ath	✓ To	tal u	utiliza y	ation	□ F	Period	6	Act	ivitys oup b	in a r y emp	ow loyee		
	Data	To	olting				26	Jtilizatio	n	ite											bow											Cre				
	Data	100	onips		_			Resou	ice ui	iits										-	Febru	Jary 2	016									GIU	up			
	Cutoff date: 27.01.16	00:00	<<	26 T	27 W	28 T	29 F	30 3 S 5	1 01	02 T	03 W	04 T	05 F	06 S	07 S	08 M	09 10 T V	0 1 / T	1 10 T F	2 13 S	14 S	15 M	16 1 T V	7 18 / T	19 F	20	21	22 M	23 T	24 W	25 T	26 2 F	27 20 S 5	3 29 M	01 T	0.
Nr.	Name		Effort	· ·	16	16	10	0 0	8	6				0	0			4	1 8		0	13	13 8	8	8	0	0	3								F.
⊟ 13.02	Tidy		25															4	8			8	5													
1.7	following and updating	plans	15																		1	f o	llowir	g and	l up	datin	ig pla	ns								
2.2	software test environm	ient	10																				S 0	ftwar	e te	st en	iviron	men	t							
⊟ 16.02	Sleeper		58		8	8	2															5	<u>8</u>	<u>8</u>	<u>8</u>			<u>3</u>								
1.1	software development	planning	18					sonwar	e dev	elop	men	it piai	mini	9						-	_	1							offw	aro	annin	oori	no nr	vironn	nont	
2.1	software engineering e	environment	40		-																								SOILW	are	enya	een	iy en	vironi	nem	
1.2	system test planning		38		0	8	0		8	0	SVS	tem t	esti	olann	ina																					
•																																				•
.	16.02 Name: Sleeper																														Code:					
Activiti	es Timesheets E	Employee Cal	lendar		Tea	m me	ember	8																												
Nr.	Name			Subp	rojec	t			(Durati	on	St	art			Fin	ish	R	ole			B	0	A		Pr	Util	A.	Effo	ort I	Votes			(UK	
1.5 1.5	software tran software tran	nsition planning nsition planning		projec projec	ct pla	annin annin	ig and ig and	l oversigi l oversigi	nt nt		18 18	05.02 05.02	. 16 0 . 16 0	00:80 08:00	09 09	02.1 02.1	6 10:00 6 10:00) 14) 1	4.001 1.001	desigr progra	ner ammer.	-1	1 0 1	00 10 00 10	00 00									Ca	ancel	
21.1.4	(2016_2_soft) software tran (2016_2_soft) software tran	nsition planning		projec	ct pla	annin annin	ig and	l oversig	nt st		17	08.02	2.16 1	6:00	10	U2.1	6 17:00 6 17:00)								100	100			17						
16	eoftware tra	neition planning		nmier	st ola	annin	ig and in end	loversio	*		5	n9 n3	1 1 1	0.00	09	02.1	6 16-00	, 1 1.	1 001	deeinr	her	-1	1	10 1/	n	100	100			17		•				
Conly a	E POOL: http://localhost/ris	Only act	tivities 1	with m	natch	ning I	role STRL	ICTURE:	Emplo	vee																E	1	- 	DAY	1.1		_				+

- These activities are displayed not as bars in the diagram, but as list in the Properties window.
- The overload of an employee, which happens because of simultaneous assignments in other projects, is marked in red.
- It will become significant if the assigned employees or allocated machines are not only participating in the actual project, but are also the part of other projects within the company.

Tip You can select a portfolio for a project, by

• Clicking on a vacancy of the Gantt chart area

R 🗃 📁	⊟ 5 े ₹	EMPLOYEE USAG	SE											new_	softw	are de	velop	ment	proce	55												-		×
FILE	START PROJECT	FORMAT																																^
Gantt chart	Variance analysis Carter diagram Gantt-network chart	Employee Besource views	e å m *	Er M	nploy achin	ee ie	. ∞ ∞ ⊂ ⊂	Resource Cost cha Gantt ch dditiona	e char rt ▼ art	t •	* S	iave Manag ihow	ge v	Project	t Res	ource	0×	25×	50×	75× 100	22	Ac ات Su کې Lir	ivity bproj k *	r ect ⊤	St	ructur	• = • = • = ine	* * *	T K M	• •	Ţ	Cutoff Curren Project	date nt date t start ing	•
	,				-													-		Februa	ary 2	016							-					
	Cutoff date: 27.01.	16 00:00	~~	26 T	27 W	28 T	29 F	30 31 S S	01 M	02 T	03 W	04 T	05 0 F \$	6 07 6 S	08 M	09 T	10 1 W 1	1 12 T F	2 13 S	14 S	15 M	16 17 T W	18 T	19 F	20 S	21 S	22 : M	23 2 T	24 2 W 1	5 26 F F	27 S	28 2 S /	29 01 M T	0: V
Nr.	Name		Effort		16	16	10		8	6							4	4 8			13	13 8	8	8			3							
⊡ 13.02	Tidy		25														4	4 8			8	5												
1.7	following and updati	ng plans	15																		fo	llowin	g and	upd	ating) plan	S							
2.2	software test environ	ment	10																			Sol	twar	etes	ten	Aronn	ient							
□ 16.02	Sleeper	-	58		8	8	2	oftware	dev	elopr	nenti	nlani	nina								5	<u>8</u> 8	<u>8</u>	8			<u>3</u>							
1.1	software engineering	nt planning	18		-	• • • • • • • • • • • • • • • • • • • •		ontinune	uon	olop.																	s SC	oftwa	ire er	ainee	ring e	enviro	nmen	t
□ 20.02	Think	genvironment	38		8	8	8		8	6													-							-				
1.2	system test planning	1	38								syste	m te	st pla	nning				1																
4 Proje	Selected portfolio: 21 ct overview Portfolio c	016 portfolio dashboard Exte	emal do	cum	ents																						R	eload		Rem	ove			
Name								b	ocked			Cor	mplete	d Cod	le	Cat	egory			Priority	S	atus				Start			Fini	ish	_			
✓sof	ware development process							0	ptimis	tic			1	5						100					25.	11.10 (01.10 (00:00	20	6.01.1 c 02 1	1 14:00				
	y software development pro	Cess						0	pumisi otimist	lic fic				0						100					20.	01.160	00.00	2	9.02.1 9.03.1	6 14·0	5			
⊡Pro	ject2							0	ptimis	tic				0						100					02.	02.16 (00:00	2	3.02.1	6 00:00	5			
20	16_2_soft							0	ptimis	tic				0						100					03.	02.16 (00:00	24	4.02.1	6 00:00	וו			
RESOUR	CE POOL: http://localhost,	/ris6/21 PORTFOL	IO ON			2	STRU	CTURE: E	mplo	yee															E		11	DAY	1:1			-		+

- click on button in the properties window and select portfolio from the list
- all projects of the portfolio are listed in the tab portfolio dashboard.

5.4 Automatically assign resources

5.4.1 Assign employees to activities

Requirements: In order to assign employees to activities, at first you need to assign personnel resources in the form of roles.

The automatic staff assignment consists of three steps:

- 1. Select employees
- 2. Select activities
- 3. Assign employees

In order to assign employees to activities semi-automatically, please follow these steps:

• Select the menu item Project > Employee > Assign employees to activities.

R 🖬 🧀	🖥 🎝 🗟	Ŧ		EMPLOYE	E USAGE			
FILE	START	PROJEC	r i	FORM	IAT			
1	Earliest	start date	Emp	oloyee 👻	* A	bb		3
Taka	🕨 Latest st	art date	**	Assign th	e employe	es a a	ctivities	
over	Other funct	ions 🝷	-2	Remove t	he employ	ees fr	om activitys	
	Schedule		<u>å</u> å	Determin	e the emp	loyees	a activitys	

The dialogue box Employee assignment - Step 1 of 3: Choice of employees opens.

Nr.	Name	Code	E-mail	Calendar	Week	On-call	Role - qualification	Pro	Costs	Notes
13.001	East				40 hour	100 %				
✓ 14.02	Diligent				40 hour	100 %	11.002 programmer - PHP	100 %	0.00	
✓ 14.01	Diligent				40 hour	100 %	11.003 programmer - V	100 %	0.00	
✓ 19.02	Fast				40 hour	100 %	11.003 programmer - V	100 %	0.00	
✓ 19.01	Fast				40 hour	100 %	11.001 programmer - C++	100 %	0.00	
11.001	North - Team A				40 hour	100 %				
☑ 17.01	Eager				40 hour	100 %	15.001 analyst	100 %	0.00	
✓ 17.02	Eager				40 hour	100 %	11.001 programmer - C++	100 %	0.00	
✓ 13.01	Tidy				40 hour	47.619	11.001 programmer - C++	100 %	0.00	
✓ 13.02	Tidy				40 hour	47.619	11.003 programmer - V	100 %	0.00	
12.001	South				40 hour	100 %				
✓ 15.01	Goeslike				40 hour	100 %	16.001 support	100 %	0.00	
18.01	Slow				40 hour	100 %	11.001 programmer - C++	100 %	0.00	
214.001	West				40 hour	100 %				
✓ 16.02	Sleeper				40 hour	95.238	14.001 designer	100 %	0.00	
16.01	Sleeper				40 hour	95.238	11.001 programmer - C++	100 %	0.00	
20.01	Think				40 hour	100 %	14.001 designer	100 %	0.00	
20.02	Think				40 hour	100 %	15.001 analyst	100 %	0.00	
21.02	Consider				40 hour	100 %	11.003 programmer - V	100 %	0.00	
21.01	Consider				40 hour	100 %	11.002 programmer - PHP	100 %	0.00	
212.01	Superman			2 all	45 hour	100 %	13.001 manager	100 %	0.00	
4										Þ
	1									

The list includes all the employees you can assign to activities or reassign to other activities by selecting them in Step 1.

Employees are grouped together in teams, while employees not being part of a team are shown at the lower end of the list.

- Calendar predefined calendar of the employee.
- Week average working hours per week.
- **On-call** percentage of the possible working capacity of an employee within project duration, adjusted for the reported non-working days (holidays/sickness).
- Click the check boxes of the employees you would like to assign to activities in the column **No.** You may also click on the button **Select all**.

• Click on the button **Continue**. The dialogue box **Employee assignment - Step 2 of 3: Choice of activities** opens.

Nr.	Name	Completed	Duration	Start	Finish 📥
\checkmark	new_software development process			27.01.16 08:00	29.03.16 14:00
∕4	system design	0	42	01.03.16 15:00	08.03.16 17:00
≤5	software requirements analysis	0	30	01.03.16 15:00	07.03.16 12:00
	unit integration and testing	0	26	09.03.16 08:00	14.03.16 10:00
∕8	qualification testing	0	21	14.03.16 10:00	16.03.16 16:00
9	system qualification testing	0	28	16.03.16 16:00	22.03.16 11:00
⊻10	software configuration management	0	21	16.03.16 16:00	21.03.16 12:00
⊻11	software product evaluation	0	34	22.03.16 11:00	28.03.16 14:00
⊻12	End	0	0	29.03.16 14:00	29.03.16 14:00
⊡1	project planning and oversight			27.01.16 08:00	15.02.16 11:00
⊠1.1	software development planning	0	18	27.01.16 08:00	29.01.16 10:00
⊻1.2	system test planning	0	38	27.01.16 08:00	02.02.16 15:00
⊻1.3	software installation planning	0	9	02.02.16 15:00	03.02.16 16:00
⊻ 1.5	software transition planning	0	18	05.02.16 08:00	09.02.16 10:00
☑1.7	following and updating plans	0	15	11.02.16 13:00	15.02.16 11:00
⊻1.6	software transition planning	0	5	09.02.16 10:00	09.02.16 16:00
⊻1.4	software installation planning	0	36	05.02.16 08:00	11.02.16 12:00
⊘ 2	establishing a software development environment			15.02.16 11:00	26.02.16 11:00
✓2.1	software engineering environment	0	40	15.02.16 11:00	22.02.16 11:00
✓ 2.2	software test environment	0	10	15.02.16 11:00	16.02.16 14:00
✓2.3	software development library	0	21	15.02.16 11:00	17.02.16 17:00
✓2.4	software development files	0	36	18.02.16 08:00	24.02.16 12:00
✓ 2.5	non-deliverable software	0	15	24.02.16 13:00	26.02.16 11:00
⊠3	system requirements analysis			26.02.16 11:00	07.03.16 09:00
⊠3.1	analysis of user input	0	19	26.02.16 11:00	01.03.16 15:00
≤3.2	operational concept	0	27	01.03.16 15:00	07.03.16 09:00
≤3.3	system requirements	0	15	01.03.16 15:00	03.03.16 14:00
	software implementation and unit testing			09.03.16 08:00	15.03.16 17:00
≤6.1	software implementation	0	40	09.03.16 08:00	15.03.16 17:00 🔻
•	1				

This list provides you with all the activities you can later assign employees to.

- The activities provided for selection reflect the structure of the project.
- Click on the check boxes for the activities to whom you want to assign employees. You may also click on the button **Select all**.
- Click on the button **Continue**. The dialogue box **Employee assignment Step 3 of 3: Assigning activities to employees** opens.

Nr.	Name	On-call	Role/quantity-effort	Start	Finish	Pro	Costs	Notes	
2.1	software engineering environ	100 %	0 Ph	15.02.16 11:00	22.02.16 11:00				
2.3	software development library	100 %	'0 Ph	15.02.16 11:00	17.02.16 17:00				
2.5	non-deliverable software	100 %	0 Ph	24.02.16 13:00	26.02.16 11:00				
3.3	system requirements	100 %	'0 Ph	01.03.16 15:00	03.03.16 14:00				
4	system design	100 %	0 Ph	01.03.16 15:00	08.03.16 17:00				
8	qualification testing	100 %	0 Ph	14.03.16 10:00	16.03.16 16:00				
10	software configuration manag	100 %	'0 Ph	16.03.16 16:00	21.03.16 12:00				
11	software product evaluation	100 %	0 Ph	22.03.16 11:00	28.03.16 14:00				
☑ 15.01	Goeslike	100 %	16.001 support			100 %	0.00		
⊠7	unit integration and testing	100 %	26 Ph	09.03.16 08:00	14.03.16 10:00				
∕8	qualification testing	100 %	21 Ph	14.03.16 10:00	16.03.16 16:00				
∀ 9	system qualification testing	100 %	28 Ph	16.03.16 16:00	22.03.16 11:00				
≤ 14.02	Diligent	100 %	11.002 programmer - PHP			100 %	0.00		
2.1	software engineering environ	100 %	40 Ph	15.02.16 11:00	22.02.16 11:00				
2.4	software development files	100 %	'1 * 36 Ph	18.02.16 08:00	24.02.16 12:00				
14.01	Diligent	100 %	11.003 programmer - V.Basic			100 %	0.00		
1.7	following and updating plans	100 %	0 Ph	11.02.16 13:00	15.02.16 11:00				
2.1	software engineering environ	100 %	0 Ph	15.02.16 11:00	22.02.16 11:00				
2.2	software test environment	100 %	'0 Ph	15.02.16 11:00	16.02.16 14:00				
5	software requirements analysis	100 %	0 Ph	01.03.16 15:00	07.03.16 12:00				
7	unit integration and testing	100 %	0 Ph	09.03.16 08:00	14.03.16 10:00				
10	software configuration manag	100 %	0 Ph	16.03.16 16:00	21.03.16 12:00				
13.02	Tidy	47.619	11.003 programmer - V.Basic			100 %	0.00		
1.7	following and updating plans	100 %	0 Ph	11.02.16 13:00	15.02.16 11:00				
2.1	software engineering environ	100 %	0 Ph	15.02.16 11:00	22.02.16 11:00				
2.2	software test environment	100 %	0 Ph	15.02.16 11:00	16.02.16 14:00				
5	software requirements analysis	0 %	0 Ph	01.03.16 15:00	07.03.16 12:00				
7	unit integration and testing	0 %	0 Ph	09.03.16 08:00	14.03.16 10:00				
10	software configuration manag	0 %	0 Ph	16.03.16 16:00	21.03.16 12:00				-
•								>	

This list includes all the selected employees you can assign to the selected activities in Step 3.

Employees can be assigned to an activity if their role and qualification meet the demands of the activity.

Assignations are automatically evaluated and have an effect on succeeding activities (white: assignation possible, grey: assignation not possible as already covered by an employee, red: assignation possible, but time conflicts occur).

- **On-call** percentage of the possible working capacity of an employee within activity duration, adjusted for the reported non-working days (holidays/sickness).
- **Role** role of the employee.
- Effort number of required employees for the activity and effort.
- Start scheduled start of the activity.
- **Finish** scheduled finish of the activity.
- Click on the check box for the activity you want to assign to an employee (for instance, because the employee can be on-call for 100% of the total activity duration). Assignation options are dynamically adjusted.

Note: During assignination we recommend you to use the following strategy to avoid resources overload: first, assign activities to employees who can cover activities at 100% (column **On-call**) and productivity at 100%.

- Repeat Step 6, if necessary. You may also click on the button Assign employees automatically.
- Click on the button **Finish**.

Important! Possible conflicts and overloads are indicated in red, and there is no automatic assignation.

5.4.2 Remove employees from activities

You can automatically remove the employee assigned to the tasks.

The automatic removal of employees resources consists of two steps:

- 1. Select employee
- 2. Select activities

To automatically deduct employees from the activities, please proceed as follows:

1. • Select the menu item **Project > Employee > Remove the employee from activities**.



The dialogue box Employee deduction - Step 1 of 2: Choice of employee opens.

	Name	Code	E-mail	Calendar	Week	On-call	Role - qualification	Prod	Costs	Notes
11.001	North - Team A				40 hour	100 %				
☑ 17.01	Eager				40 hour	100 %	15.001 analyst	100 %	50.00	
☑ 13.01	Tidy, John				40 hour	100 %	11.001 programmer - C++	100 %	40.00	
12.001	South				40 hour	100 %				
21.02	Consider				40 hour	100 %	11.003 programmer - V	100 %	40.00	
☑ 15.02	Goeslike				40 hour	100 %	12.001 writter	100 %	40.00	
14.001	West				40 hour	100 %				
☑ 16.02	Sleeper				40 hour	100 %	14.001 designer	100 %	50.00	
20.02	Think				40 hour	100 %	15.001 analyst	100 %	40.00	

The list includes all the employees you can deduct from activities by selecting them in Step 1.

Employees are grouped together in teams, while machines not being part of a team are shown at the lower end of the list.

- Calendar predefined calendar of the employee.
- Week average working hours per week.

- **On-call** percentage of the possible working capacity of an employee within project duration, adjusted for the reported non-working days (holidays/sickness).
- Select the check boxes by the employees in the **No.** column that you want to deduct from activities. You may also click on the button **Select all**.
- Click on the button Continue. The dialogue box Employee deduction Step 1 of 2: Choice of activities opens.

Nr.	Name	Completed	Effort	Duration	Start	Finish	4
	Building planning				08.05.23 08:00	24.07.23 12:00	
⊻2	Invoicing for phase 1	0	0	0	29.06.23 17:00	29.06.23 17:00	
☑ 4	Invoicing for phase 2	0	0	0	16.06.23 17:00	16.06.23 17:00	
6	Invoicing for phase 3	0	0	0	20.07.23 17:00	20.07.23 17:00	
7	End of the planning	0	0	0	24.07.23 12:00	24.07.23 12:00	
⊠ 1	Phase 1				08.05.23 08:00	29.06.23 17:00	
1.1	Cost estimate	100	16	1	08.05.23 08:00	08.05.23 17:00	
☑ 1.2	Project procedure	0	80	10	10.05.23 08:00	23.05.23 17:00	
☑ 1.3	Completing the construction schedule	0	128	8	17.05.23 08:00	26.05.23 17:00	
☑ 1.4	Create task lists	0	136	17	26.05.23 08:00	19.06.23 17:00	
☑ 1.5	Order	0	152	19	05.06.23 08:00	29.06.23 17:00	
☑ 3	Phase 2				10.05.23 08:00	16.06.23 17:00	
✓ 3.1	Create the order plan	20	80	5	10.05.23 08:00	16.05.23 17:00	
☑ 3.2	Planning the design phase	0	32	4	23.05.23 08:00	26.05.23 17:00	
☑ 3.3	Building planning presentation	0	96	6	24.05.23 08:00	31.05.23 17:00	
☑ 3.4	Set up the document control	0	40	5	24.05.23 08:00	30.05.23 17:00	
☑ 3.5	Setting up the project monitoring	0	40	5	24.05.23 08:00	30.05.23 17:00	
☑ 3.6	Project cost control	0	80	10	24.05.23 08:00	06.06.23 17:00	
☑ 3.7	Complete the request list	0	160	10	05.06.23 08:00	16.06.23 17:00	
5	Phase 3				12.06.23 08:00	20.07.23 17:00	
5 1	Project reporting	0	120	15	12 06 23 08:00	30.06.23.17:00	1

This list shows you all the activities of the project or portfolio.

- The activities offered for selection reflect the structure of the project.
- Click on the check box for the activity from which you want to subtract the employees. You may also click on the button **Select all**.
- Click on the button **Finish**.

5.4.3 Assign machinery to activities

Requirements: In order to assign machines to activities, at first you need to assign personnel resources in the form of roles.

In order to assign machines to activities semi-automatically, please follow these steps:

• Select the menu item **Project > Machine > Assign machines to activities**.

R 🖬 🧀	\$ 🖯 🗘	¢ 🗆 "		GANTT CHA	RT					
FILE	START	PROJEC	л	FORMAT						
~	Earliest st	tart date	Emp	loyee 🔹	•	Add		🖅 Resource poo		
Take	Latest sta	rt date	Mac	hine *	Project resou	rces				
over	Schedule		-*	Assign the machinery to activities						
		Cutoff	d 🟞	Determine n	nachii	ne role fi	rom machin	ery assigment	May 2	

The dialogue box Assigning machines - Step 1 of 3: Selection of machines opens.

r.	Name	Code	Machine group - Machi	Costs	Notes
12.01	machine 1		12.001 Rotate machine	85.00	
13.01	machine 2		13.001 Milling machine	90.00	

The list includes all the machines you can assign to activities or reassign to other activities by selecting them in Step 1.

Machines are grouped together in teams, while machines not being part of a team are shown at the lower end of the list.

- Machine group-machine type to which type of machine does the machine belong.
- **Costs** Operating costs per hour.
- Click the check boxes of the machines you would like to assign to activities in the column **No.** You may also click on the button **Select all**.
- Click on the button **Continue**. The dialogue box **Assigning machines Step 2 of 3: Selection of activities** opens.

	Name	Completed	Effort	Duration	Start	Finish
	Building planning				08.05.23 08:00	24.07.23 12:
⊴ 2	Invoicing for phase 1	0	0	0	29.06.23 17:00	29.06.23 17:
∠ 4	Invoicing for phase 2	0	0	0	16.06.23 17:00	16.06.23 17:
26	Invoicing for phase 3	0	0	0	20.07.23 17:00	20.07.23 17:
27	End of the planning	0	0	0	24.07.23 12:00	24.07.23 12:
21	Phase 1				08.05.23 08:00	29.06.23 17:
1.1	Cost estimate	100	16	1	08.05.23 08:00	08.05.23 17:
☑ 1.2	Project procedure	0	80	10	10.05.23 08:00	23.05.23 17:
☑ 1.3	Completing the construction schedule	0	128	8	17.05.23 08:00	26.05.23 17
☑ 1.4	Create task lists	0	136	17	26.05.23 08:00	19.06.23 17:
☑ 1.5	Order	0	152	19	05.06.23 08:00	29.06.23 17
3	Phase 2				10.05.23 08:00	16.06.23 17:
3.1	Create the order plan	20	80	5	10.05.23 08:00	16.05.23 17
☑ 3.2	Planning the design phase	0	32	4	23.05.23 08:00	26.05.23 17
☑ 3.3	Building planning presentation	0	96	6	24.05.23 08:00	31.05.23 17:
☑ 3.4	Set up the document control	0	40	5	24.05.23 08:00	30.05.23 17:
☑ 3.5	Setting up the project monitoring	0	40	5	24.05.23 08:00	30.05.23 17
☑ 3.6	Project cost control	0	80	10	24.05.23 08:00	06.06.23 17:
3.7	Complete the request list	0	160	10	05.06.23 08:00	16.06.23 17:
5	Phase 3				12.06.23.08.00	20 07 23 17

This list provides you with all the activities you can later assign machines to.

- The activities provided for selection reflect the structure of the project.
- Click on the check boxes for the activities to whom you want to assign machines. You may also click on the button **Select all**.
- Click on the button **Continue**. The dialogue box **Assigning machines Step 3 of 3: Assigning machines to activities** opens.

r.	Name	Machinery/quantity-effort	Start	Finish	Costs	Notes
12.01	machine 1	12.001 Rotate machine			85.00	
☑ 1.2	Project procedure	80 man-hour	10.05.23 08:00	23.05.23 17:00		
1.3	Completing the construction schedule	'1 * 64 man-hour	17.05.23 08:00	26.05.23 17:00		
3.2	Planning the design phase	'1 * 32 man-hour	23.05.23 08:00	26.05.23 17:00		
✓ 5.1	Project reporting	120 man-hour	12.06.23 08:00	30.06.23 17:00		
13.01	machine 2	13.001 Milling machine			90.00	
✓ 3.6	Project cost control	80 man-hour	24.05.23 08:00	06.06.23 17:00		
1.4	Create task lists	'1 * 136 man-hour	26.05.23 08:00	19.06.23 17:00		
☑ 5.2	Invoice verification	80 man-hour	12.06.23 08:00	23.06.23 17:00		

This list includes all the selected machines you can assign to the selected activities in Step 3.

Machines can be assigned to an activity if their group and type meet the demands of the activity.

Assignations are automatically evaluated and have an effect on succeeding activities (white: assignation possible, grey: assignation not possible as already covered by an machine, red: assignation possible, but time conflicts occur).

- Machinery Machine type of the machine.
- quantity-effort Quantity of machines required for the activity and effort.
- Start Planned start of activity.
- Finish Planned finish of activity.
- Click on the check box for the activity you want to assign to an machine. Assignation options are dynamically adjusted.
- Repeat Step 6, if necessary. You may also click on the button Assign machines automatically.
- Click on the button Finish.

Important! Possible conflicts and overloads are indicated in red, and there is no automatic assignation.

5.4.4 Remove machinery from activities

You can automatically remove the machines assigned to the activities.

Automatic removal from the machine park consists of two steps. 1:

- 1. select machine park resources
- 2. select activities

To automatically remove machinery from the activities, please follow these steps:

• Select the menu item **Project > Machine > Remove the machinery from activities**.

R 🧀	\$ 🖯 ל	ぐ □ "		GANTT CH	ART				
FILE	START	PROJEC	т	FORMAT					
	Earliest st	tart date art date	Emp Mac	oloyee 🔻	1	Add Select		Resource poo	ol Irces
over	Other functions 🔹 Schedule		** **	** Assign the machinery to activities					
		Cutoff	d 👯	Determine r	nachii	ne role f	rom machin	ery assigment	May 2

The dialogue box Machine deduction - Step 1 of 2: Choice of machinery opens.

۱r.	Name	Code	Machine group - Machi	Costs	Notes
12 01	machine 1		12 001 Rotate machine	85.00	
2 13.01	machine 2		13.001 Milling machine	90.00	

The list includes all the machines you can deduct from activities by selecting them in Step 1.

Machines are grouped together in teams, while machines not being part of a team are shown at the lower end of the list.

- Machine group-machine type to which type of machine does the machine belong.
- Costs Operating costs per hour.
- Select the check boxes by the machines in the **No.** column that you want to deduct from activities. You may also click on the button **Select all**.
- Click on the button **Continue**. The dialogue box **Machinery deduction Step 2 of 2: Selection of activities** opens.

	Name	Completed	Effort	Duration	Start	Finish	
	Building planning				08.05.23 08:00	24.07.23 12:00	
✓ 2	Invoicing for phase 1	0	0	0	29.06.23 17:00	29.06.23 17:00	
✓ 4	Invoicing for phase 2	0	0	0	16.06.23 17:00	16.06.23 17:00	
26	Invoicing for phase 3	0	0	0	20.07.23 17:00	20.07.23 17:00	
27	End of the planning	0	0	0	24.07.23 12:00	24.07.23 12:00	
21	Phase 1				08.05.23 08:00	29.06.23 17:00	
1.1	Cost estimate	100	16	1	08.05.23 08:00	08.05.23 17:00	
☑ 1.2	Project procedure	0	80	10	10.05.23 08:00	23.05.23 17:00	
☑ 1.3	Completing the construction schedule	0	128	8	17.05.23 08:00	26.05.23 17:00	
☑ 1.4	Create task lists	0	136	17	26.05.23 08:00	19.06.23 17:00	
2 1.5	Order	0	152	19	05.06.23 08:00	29.06.23 17:00	
3	Phase 2				10.05.23 08:00	16.06.23 17:00	
⊠ 3.1	Create the order plan	20	80	5	10.05.23 08:00	16.05.23 17:00	
3.2	Planning the design phase	0	32	4	23.05.23 08:00	26.05.23 17:00	
⊠ 3.3	Building planning presentation	0	96	6	24.05.23 08:00	31.05.23 17:00	
⊠ 3.4	Set up the document control	0	40	5	24.05.23 08:00	30.05.23 17:00	
☑ 3.5	Setting up the project monitoring	0	40	5	24.05.23 08:00	30.05.23 17:00	
3.6	Project cost control	0	80	10	24.05.23 08:00	06.06.23 17:00	
3.7	Complete the request list	0	160	10	05.06.23 08:00	16.06.23 17:00	
2 5	Phase 3				12.06.23 08:00	20.07.23 17:00	
51	Project reporting	0	120	15	12.06.23.08-00	30.06.23.17.00	

This list shows you all the activities of the project or portfolio.

- The activities offered for selection reflect the structure of the project.
- Click on the check box for the activity from which you want to subtract the machines. You may also click on the button **Select all**.
- Click on the button **Finish**.

5.4.5 Identify roles from the employyes assignation

If you have assigned employees to activities without assigning roles before this, you can identify the required roles from the employee assignation.

In order to identify roles from employee assignation, do as follows:

• Select the menu item Project > Assistant > Employee > Identify roles from the employee assignation.



The dialogue box Identify roles from employee assignation - Step 1 of 1: Activities selection opens.

✓ ✓4 ✓5 ✓7 ✓8 ✓9 ✓10 ✓11 ✓12 ✓1	new_software development process system design software requirements analysis unit integration and testing qualification testing system qualification testing software configuration management	0 0 0 0	42 30	27.01.16 08:00 01.03.16 15:00 01.03 16 15:00	29.03.16 14:00 08.03.16 17:00
 ✓4 ✓5 ✓7 ✓8 ✓9 ✓10 ✓11 ✓12 ✓1 	system design software requirements analysis unit integration and testing qualification testing system qualification testing software configuration management	0 0 0 0	42 30	01.03.16 15:00	08.03.16 17:00
 ✓5 ✓7 ✓8 ✓9 ✓10 ✓11 ✓12 ✓1 	software requirements analysis unit integration and testing qualification testing system qualification testing software configuration management	0 0 0	30	01 03 16 15:00	
 ✓7 ✓8 ✓9 ✓10 ✓11 ✓12 ✓1 	unit integration and testing qualification testing system qualification testing software configuration management	0	00		07.03.16 12:00
 ✓ 8 ✓ 9 ✓ 10 ✓ 11 ✓ 12 ✓ 1 	qualification testing system qualification testing software configuration management	0	26	09.03.16 08:00	14.03.16 10:00
 ✓9 ✓10 ✓11 ✓12 ✓1 	system qualification testing software configuration management		21	14.03.16 10:00	16.03.16 16:00
 ✓ 10 ✓ 11 ✓ 12 ✓ 1 	software configuration management	0	28	16.03.16 16:00	22.03.16 11:00
 ✓11 ✓12 ✓1 		0	21	16.03.16 16:00	21.03.16 12:00
⊡12 ⊡1	software product evaluation	0	34	22.03.16 11:00	28.03.16 14:00
⊠1	End	0	0	29.03.16 14:00	29.03.16 14:00
	project planning and oversight			27.01.16 08:00	15.02.16 11:00
⊻1.1	software development planning	0	18	27.01.16 08:00	29.01.16 10:00
⊻1.2	system test planning	0	38	27.01.16 08:00	02.02.16 15:00
⊻1.3	software installation planning	0	9	02.02.16 15:00	03.02.16 16:00
⊻1.5	software transition planning	0	18	05.02.16 08:00	09.02.16 10:00
⊻1.7	following and updating plans	0	15	11.02.16 13:00	15.02.16 11:00
⊻1.6	software transition planning	0	5	09.02.16 10:00	09.02.16 16:00
⊻1.4	software installation planning	0	36	05.02.16 08:00	11.02.16 12:00
⊘ 2	establishing a software development environment			15.02.16 11:00	26.02.16 11:00
⊻2.1	software engineering environment	0	40	15.02.16 11:00	22.02.16 11:00
✓2.2	software test environment	0	10	15.02.16 11:00	16.02.16 14:00
✓2.3	software development library	0	21	15.02.16 11:00	17.02.16 17:00
✓2.4	software development files	0	36	18.02.16 08:00	24.02.16 12:00
⊻2.5	non-deliverable software	0	15	24.02.16 13:00	26.02.16 11:00
⊻3	system requirements analysis			26.02.16 11:00	07.03.16 09:00
⊠3.1	analysis of user input	0	19	26.02.16 11:00	01.03.16 15:00
⊻3.2	operational concept	0	27	01.03.16 15:00	07.03.16 09:00
⊻3.3	system requirements	0	15	01.03.16 15:00	03.03.16 14:00
	software implementation and unit testing			09.03.16 08:00	15.03.16 17:00
.1	software implementation	0	40	09.03.16 08:00	15.03.16 17:00

It lists all activities you can select from.

- Mark the check boxes of the activities you want to select in the column Number.
- Click on the button **Finish**.

Note:

• You can click on the button Select all activities to mark all activities at a time.

5.4.6 Identify machine types from machine allocation

If you have allocated machines to activities without having previously allocated machine types, you can identify the required machine types from the machine allocation.

In order to identify machine types from machine allocation, do as follows:

• Select the menu item *Project* > *Assistant* > *Employee*> *Machine* > *Identify machine types from machine allocation**.



The dialogue box Identify machine types from machine allocation - Step 1 of 1: Selection of activities opens.

2					
<u>▼_</u>	new_software development process			27.01.16 08:00	29.03.16 14:00
✓4	system design	0	42	01.03.16 15:00	08.03.16 17:00
≤5	software requirements analysis	0	30	01.03.16 15:00	07.03.16 12:00
⊘ 7	unit integration and testing	0	26	09.03.16 08:00	14.03.16 10:00
✓8	qualification testing	0	21	14.03.16 10:00	16.03.16 16:00
⊻9	system qualification testing	0	28	16.03.16 16:00	22.03.16 11:00
⊻10	software configuration management	0	21	16.03.16 16:00	21.03.16 12:00
⊻11	software product evaluation	0	34	22.03.16 11:00	28.03.16 14:00
⊻12	End	0	0	29.03.16 14:00	29.03.16 14:00
⊻1	project planning and oversight			27.01.16 08:00	15.02.16 11:00
⊻1.1	software development planning	0	18	27.01.16 08:00	29.01.16 10:00
⊻1.2	system test planning	0	38	27.01.16 08:00	02.02.16 15:00
⊻1.3	software installation planning	0	9	02.02.16 15:00	03.02.16 16:00
⊻ 1.5	software transition planning	0	18	05.02.16 08:00	09.02.16 10:00
⊻1.7	following and updating plans	0	15	11.02.16 13:00	15.02.16 11:00
✓ 1.6	software transition planning	0	5	09.02.16 10:00	09.02.16 16:00
⊻1.4	software installation planning	0	36	05.02.16 08:00	11.02.16 12:00
⊘ 2	establishing a software development environment			15.02.16 11:00	26.02.16 11:00
✓2.1	software engineering environment	0	40	15.02.16 11:00	22.02.16 11:00
√2.2	software test environment	0	10	15.02.16 11:00	16.02.16 14:00
✓2.3	software development library	0	21	15.02.16 11:00	17.02.16 17:00
2.4	software development files	0	36	18.02.16 08:00	24.02.16 12:00
⊻2.5	non-deliverable software	0	15	24.02.16 13:00	26.02.16 11:00
⊻3	system requirements analysis			26.02.16 11:00	07.03.16 09:00
⊻3.1	analysis of user input	0	19	26.02.16 11:00	01.03.16 15:00
✓ 3.2	operational concept	0	27	01.03.16 15:00	07.03.16 09:00
✓ 3.3	system requirements	0	15	01.03.16 15:00	03.03.16 14:00
	software implementation and unit testing			09.03.16 08:00	15.03.16 17:00
✓6.1	software implementation	0	40	09.03.16 08:00	15.03.16 17:00 🔻
•					

It lists all activities you can select from.

- Mark the check boxes of the activities in the column Number you want to select.
- Click on the button **Finish**.

Note:

• You can click on the button **Select all activities** to mark all activities at a time.

5.5 Synchronize resources

5.5.1 Shift to resource pool

It may be that the resources used in a project differ from those in the resource pool file, because project resources are saved with the project. In this case, you can shift the project resources to the resource pool.



In order to align the resources, do as follows: Select the menu item **Project > Project resource > to Resource pool**



The dialogue **Choose between project resources and resource pool** will open if there are differences in resources. The first row shows the entries from the resource pool, the second row - from the project resources.

R = (Choice of	Project Reso	ources and	Resource Po	ol						X
C	Use resou	urce pool									OK
0	Replace	resource pool	project reso	urces (via coo	le)						
	Manual re	esource select	tion								Cancel
Ca	ilendar (2 D)iff.) Roles (11 Diff.) Te	eam (1 Diff.)							
Ír	Nr.	Name	Sunday	Monday	Tuesday	Wednes	Thursday	Friday	Saturday	Exceptions	Notes
	1	Standard Standard		08:00-12:0 08:00-12	08:00-12:0 08:00-12	08:00-12:0 08:00-12	08:00-12:0 08:00-12	08:00-12:0 08:00-12		08.08.08' 08.08.08'	5-days- and 4-hWeek
-	21	- Fund Rai	-	- 08:00-12	- 08:00-12	- 08:00-12	- 08:00-12	- 08:00-12	-	-	-
-											
-											

- Take a minute to decide which of the following options you want to use for your work.
 - Choose the option Use resource pool to use the resource pool.
 - Choose the option **Replace project resources with resource pool (per code)** to replace the differing project resources data with those of the resource pool.
 - Choose the option Manual selection of resources to select manually for each deviating item.
- Click on the button **OK**.

Note:

• In selecting resources manually, the dialogue **Manual selection of resources** opens in the next step. For each of the resource items you need to enter manually what you want to do with the differing resources.

5.5.2 Manual selection of calendar

In case of differing calendars in project resources and resource pool, you can use this function to define which calendars you want to use in which ways.

The list of project resources contains the calendars (with deviations) used in a project. In the list of resource pools - the calendar defined in the resource pool.

Ne	Name	Sunday	Monday	Tuesday	Wednes	Thursday	Friday	Saturday	Exceptions	Notes
1	Chandrad	Junuay	00.00 10	00.00.10	00.00 10	00.00.10	00.00.10	Jaturuay		NOLCS
1 21	Fund Rai		08:00-12	08:00-12	08:00-12	08:00-12	08:00-12			
U	se Resource Po	ool	Replace	Pesource Po	ol	Add to the	Resource Po	bl Add	a new Group Resource Pool	Delete from All Activities
esource	e pool									
lter:									Se	ected rows: 2
Nr.	Name	Sunday	Monday	Tuesday	Wednes	Thursday	Friday	Saturday	Exceptions	Notes
1	Standard		08:00-12	08:00-12	08:00-12	08:00-12	08:00-12			5-days- and 4-hWeek
2	all		08:00-12	08:00-12	08:00-12	08:00-12	08:00-12		•••	

In order to align the project calendar with the resource pool, do as follows:

- In the table **Project resources** mark the calendar you want to align.
- Click on one of the following buttons:
 - Click on the button Use resource pool, if you want to use the resource pool calendar.

Note: this button is active only when you have selected an item for the resource pool.

- Click on the button Add to resource pool to add the project calendar to the resource pool.
- Click on the button Delete from all project activities to delete the project calendar.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.3 Manual selection of roles

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the resources saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

rioject lesu						-		
Nr.	Role			Code	Qualification	Costs	Price adju	Notes
11.001	Chairperson					0.00		
12.001	Board of Directors					0.00		
13.001	Auction Manager					0.00		
14.001	Wine Tasting Manager					0.00		
15.001	Publicity Manager					0.00		•
Use	Resource Pool	Replace Pesource Pool	Add to the Resource Pool	Add a ne	w Group Resource Pool	De	elete from All A	ctivities
Filter:						Selected	rows:	8
Nr.	Role			Code	Qualification	Cos	ts Price adju	Notes
11.001	programmer				C++	50.	00	
					PHP	45.	00	
11.002	programmer							
11.002 11.003	programmer programmer				V.Basic	50.	00	
11.002 11.003 12.001	programmer programmer writter				V.Basic	50. 30.	00	
11.002 11.003 12.001 13.001	programmer programmer writter manager				V.Basic	50. 30. 60.	00	
11.002 11.003 12.001 13.001 14.001	programmer programmer writter manager designer				V.Basic	50. 30. 60.	00	
11.002 11.003 12.001 13.001 14.001 15.001	programmer programmer writter manager designer analyst				V.Basic	50. 30. 60. 60. 70.		

In order to align manually the project roles with the roles contained in the resource pool file, do as follows:

- In the table **Project resources** mark the role you want to align.
- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool roles.

Note: this button is active only when you have selected an item for the resource pool.

- Click on the button **Replace resource pool** to replace the resource pool role with the project resource role.

Note: this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

- Click on the button **Add to resource pool** to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button Add to a new group in the resource pool to add the project resource and the group name to the new group in the resource pool.
- Click on the button Delete from all project activities to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.4 Manual selection of teams

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the resources saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

	uicea												
Nr.	Working gro	oup Code	E-mail	Team		Calendar	Non-working days	Capacity	t Capa	c Co	osts Pr	ice adju	No
11.001	Volunteer T	e				21 Fund Raiser		Medium		1 (0.00		
4													Þ
Use	Resource Po	ol	Replace	Pesource Poo	bl	Add to the F	Resource Pool Add	a new Group Re	source Pool	Delet	e from A	VI Activiti	es
Resource p ilter:	ool									Selected row	/s:		4
Nr.	Working	Code	E-mail	Team	Cale	endar	Non-working days	Capacity t	Capac	Costs	Price a	adju	Notes
	AL			Team A				Medium	2	0.00			
11.001	North												
11.001 12.001	South							Medium	2	0.00			
11.001 12.001 13.001	South							Medium Medium	2	0.00			
11.001 12.001 13.001 14.001	South East West							Medium Medium Medium	2 2 2	0.00			
11.001 12.001 13.001 14.001	South East West							Medium Medium Medium	2 2 2	0.00			
11.001 12.001 13.001 14.001	North South East West							Medium Medium Medium	2 2 2	0.00			

In order to align manually the project teams with the teams contained in the resource pool file, do as follows:

- In the table **Project resources** mark the team you want to align.
- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool team.

Note: this button is active only when you have selected an item for the resource pool.

Click on the button Replace resource pool to replace the resource pool team with the project resource team.

Note: this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

- Click on the button **Add to resource pool** to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button Add to a new group in the resource pool to add the project resource and the group name to the new group in the resource pool.
- Click on the button Delete from all project activities to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.5 Manual selection of employees

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the resources saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

	sources												
Nr.	Name	Code	E-mail	Calendar	Begin	End	Non-worki	Working g	Role - qual	Pro	Costs	Pric	Notes
13.02	Tidy						19.07.10-2	11.001 North	11.003 pro	100 %	0.00		
Us Resource	e Resource Pool	Rej	place Pesourc	e Pool	Add to	the Resourc	e Pool A	dd a new Group	Resource Poo		Delete from	All Activ	ities
ilter:										Selecte	d rows:		18
Nr.	Name	Code	E-mail	Calendar	Begin	End	Non-worki	Working g	Role - qual	Pro	Costs	Pric	Not
12.01	Superman		superma	2 all			19.07.10-2		13.001 ma	100 %	0.00		
13.01	Tidy					26.02.16	19.07.10-2	11.001 Nor	11.001 pro	100 %	0.00		
13.02	Tidy					26.02.16	19.07.10-2	11.001 Nor	11.003 pro	100 %	0.00		
14.01	Diligent						25.11.10-2	13.001 East	11.003 pro	100 %	0.00		
14.00	Diligent						25.11.10-2	13.001 East	11.002 pro	100 %	0.00		
14.02	Goeslike		goeslike		11.10.10		24.12.10;2	12.001 So	16.001 sup	100 %	0.00		
14.02	Goeslike		goeslike		11.10.10		24.12.10;2	12.001 So	12.001 writ	100 %	0.00		
14.02 15.01 15.02	Gocalito						30.11.10;0	14.001 West	11.001 pro	100 %	0.00		
15.01 15.02 16.01	Sleeper												

In order to align manually the project employees with the employees contained in the resource pool file, do as follows:

- In the table **Project resources** mark the employee you want to align.
- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool employee.

Note: this button is active only when you have selected an item for the resource pool.

 Click on the button Replace resource pool to replace the resource pool employee with the project resource employee. **Note:** this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

- Click on the button **Add to resource pool** to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button Add to a new group in the resource pool to add the project resource and the group name to the new group in the resource pool.
- Click on the button Delete from all project activities to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.6 Manual selection of materials

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the resources saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

Nr.	Material group	Code	Material type		Unit	Unit price	Price adju	Notes
11.001	Telefonanlage		Octopus F200			480.00		
11.002	Telefonanlage		ISDN Telekom Octo	opus E-Modell 20 A		320.00		
12.001	Xeon Server		3X16OCB, 2CB Ra	m - DUAL XEON		1 800.00		
13.001	IFI		19" Zoll TET DELL	UltraSharp		500.00	18.08.10/1.8	
Use I	Resource Pool Replace Pesourc	e Pool Add t	o the Resource Pool	Add a new Group	Resource Pool	Delete	e from All Activi	ties
Resource po	ol					Selected row		6
					·		J.	•
Nr.	Material group	Code	Material type		Unit	Unit price	Price adju	Notes
12.001	Metals		Steel		100 kg	0.00		
12.002	Metals		Stainless steel		100 kg	0.00		
10.000	Metals		Spring steel		50 kg	0.00		
12.003	- Notalo							
12.003	Non-ferrous metals		Aluminium		1 kg	0.00		
12.003 13.001 13.002	Non-ferrous metals Non-ferrous metals		Aluminium Copper		1 kg 10 kg	0.00		
12.003 13.001 13.002 13.003	Non-ferrous metals Non-ferrous metals Non-ferrous metals		Aluminium Copper Brass		1 kg 10 kg 10 kg	0.00 0.00 0.00		
12.003 13.001 13.002 13.003	Nonferrous metals Nonferrous metals Nonferrous metals		Aluminium Copper Brass		1 kg 10 kg 10 kg	0.00 0.00 0.00		
12.003 13.001 13.002 13.003	Non-ferrous metals Non-ferrous metals Non-ferrous metals		Aluminium Copper Brass		1 kg 10 kg 10 kg	0.00 0.00 0.00		
12.003 13.001 13.002 13.003	Non ferrous metals Non ferrous metals Non ferrous metals		Aluminium Copper Brass		1 kg 10 kg 10 kg	0.00 0.00 0.00		

In order to align manually the project employees with the materials contained in the resource pool file, do as follows:

• In the table Project resources mark the material you want to align.

- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool material.

Note: this button is active only when you have selected an item for the resource pool.

- Click on the button **Replace resource pool** to replace the resource pool material with the project resource material.

Note: this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

- Click on the button **Add to resource pool** to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button **Add to a new group in the resource pool** to add the project resource and the group name to the new group in the resource pool.
- Click on the button **Delete from all project activities** to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.7 Manual selection of machine types

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the resources saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

roject res	ources						
Nr.	Machine groups	Code	Machine type	Unit	Unit price	Price adju	Notes
11.001	Drehmaschinen	111	Graziano		235.00		
12.001	Fräsemaschinen		Кюрр		500.00		
	Resource Pool Benjace Pe	isource Pool	the Resource Pool	Add a new Group Resource Pool	Delete	e from All Activ	ities
Use	Resource Fool Replace Fe	Add to	the Resource Pool	Add a new Group Resource Poor	Delete	e from All Activ	lues
Resource p	oool						
ilter:					Selected row	s:	2
Nr.	Machine groups	Code	Machine type	Unit	Unit price	Price adju	Notes
12.001	Rotate machine				85.00		
13.001	Milling machine				90.00		

In order to align manually the project employees with the machines contained in the resource pool file, do as follows:

- In the table **Project resources** mark the machine types you want to align.
- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool machine types.

Note: this button is active only when you have selected an item for the resource pool.

- Click on the button **Replace resource pool** to replace the resource pool machine type with the project resource machine type.

Note: this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

- Click on the button **Add to resource pool** to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button Add to a new group in the resource pool to add the project resource and the group name to the new group in the resource pool.
- Click on the button Delete from all project activities to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.8 Manual selection of machinery

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the resources saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

						Troject editegon	03 (2.0)	inty Troject status	5 (5 Dill.)		
roject resou	urces										
Nr.	Machine name				Code	Working group	Mac	chine group	Costs	Price adju	Notes 🔺
11.01	Graziano						11.0	01 Drehmas	0.00		
13.01	VDF						11.0	02 Drehmas	0.00		
15.01	Heidenreich						11.0	03 Drehmas	0.00		
16.01	Kunzmann						12.0	03 Fräsemas	0.00		
17.01	Gildemeister						11.0	04 Drehmas	0.00		-
Use	Resource Pool	Replace Pe	source Pool	Add to t	he Resource	Pool Add a r	new Gro	oup Resource Pool	De	elete from All A	Activities
Resource po	ol										
ilter:									Selected	rows:	2
					0.1	Madrice		Machine aroun	0		Num
Nr.	Machine name				Lode	working group	, I	Machine group	Cos	sts Price adju	J Notes
Nr. 12.01	Machine name machine 1				Lode	working group	1	12.001 Rotate m	85.	sts Price adju 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2				Lode	working group	1	12.001 Rotate m 13.001 Milling ma	85.	oo 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2				Code	working group	1	12.001 Rotate m 13.001 Milling ma	85. 90.	oo 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2				Lode	working group	1	12.001 Rotate m 13.001 Milling ma	85. 90.	oo 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2					working group	1	12.001 Rotate m	85.	Price adju 00 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2				Lode	working group	1	12.001 Rotate m	85.	DO Price adju	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2						1	12.001 Rotate m	85. 90.	00 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2						1	12.001 Rotate m	. 90.	00 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2						1	12.001 Rotate m	85. 90.	00 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2							12.001 Rotate m	. 90.	00 00	J Notes
Nr. 12.01 13.01	Machine name machine 1 machine 2							12.001 Rotate m	. 90.	00 00	J Notes

In order to align manually the project machines with the machines contained in the resource pool file, do as follows:

- In the table **Project resources** mark the machines you want to align.
- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool machine.

Note: this button is active only when you have selected an item for the resource pool.

 Click on the button Replace resource pool to replace the resource pool machine with the project resource machine.

Note: this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

- Click on the button **Add to resource pool** to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button **Add to a new group in the resource pool** to add the project resource and the group name to the new group in the resource pool.
- Click on the button Delete from all project activities to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.9 Manual selection of project category

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the project categories saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

ual resource	e selection	-	-			_	
alendar (1 Dif	.) Roles (7 Diff.) Project categori	es (4 Diff.) Project status	(1 Diff.)				
Project reso	urces						
Nr.	Group			Code	Name		Notes
11.01	Operative				Level 1		
11.02	Operative				Level 2		
12.01	Nachrangige						
13.01	Strategische						
Use	Resource Pool Replace	ce Pesource Pool	Add to the Resource Pool	Add a new Group	Resource Pool	Delete from	All Activities
Resource po Filter:	ool					elected rows:	3
Nr.	Group			Code	Name		Notes
11.01	Strategic						
12.01	Operational						
13.01	Tactical						
						OK	Abbrechen

In order to align manually the project categories with the categories contained in the resource pool file, do as follows:

- In the table **Project resources** mark the category you want to align.
- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool categories.

Note: this button is active only when you have selected an item for the resource pool.

- Click on the button **Replace resource pool** to replace the resource pool category with the project resource category.

Note: this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

 Click on the button Add to resource pool to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button Add to a new group in the resource pool to add the project resource and the group name to the new group in the resource pool.
- Click on the button Delete from all project activities to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.10 Manual selection of project status

In case of project resources differing from the resource pool, you can use this function to define which resource you want to use in which ways.

The list of project resources contains the resources (with deviations) used in a project. The list of the resource pool contains the resources saved in the resource pool (the program filters automatically the resources that match with the project resources and the resource pool in the field **Filter**).

Project reso	urces								
Nr.	Group					Code	Name		Notes
11.01	In Planung								
Use	Resource Pool	Replace Pe	esource Pool	Add to the Resource Pool	Add a	new Group I	Resource Pool	Delete from	All Activities
Resource p	ool								
Filter:							S	elected rows:	4
Nr.	Group					Code	Name		Notes
11.01	in work								
1201	in planning								
12.01									
13.01	completed								
13.01	completed								
13.01	completed rejected								
13.01	completed rejected								
13.01	completed rejected								
13.01	completed rejected								
13.01	completed rejected								

In order to align manually the project status with the status contained in the resource pool file, do as follows:

• In the table **Project resources** mark the status you want to align.

- Click on one of the following buttons:
 - Click on the button Use resource pool if you want to use the resource pool status.

Note: this button is active only when you have selected an item for the resource pool.

- Click on the button **Replace resource pool** to replace the resource pool status with the project resource status.

Note: this button is active only when the allocation of a resource pool to the project resource via the code has been successful.

- Click on the button **Add to resource pool** to add the project resource to the resource pool (the group properties are entered in the existing group, but not in the group name of the project resource).

Note: this button is active only when you have selected a group in the table Resource pool.

- Click on the button Add to a new group in the resource pool to add the project resource and the group name to the new group in the resource pool.
- Click on the button Delete from all project activities to delete the project resource.
- If necessary, switch to another tab to align the resources.
- Click on the button **OK**.

5.5.11 Manual selection of project clients

.. index :: Synchronise project clients, Project client difference

In case of differences between the project resources and the resource pool you can determine here which resource is to be used and how.

In the list of project resources, the resources contained in the project (with deviations) are displayed. In the list of the resource pool the resources stored in the resource pool (the programme automatically filters the resources in the project and resource pool in the resource pool in the **Filter** field).

	ource selection													
ject cust	tomer (1 Diff.)													
roject res	sources:													
Nr.	Name	Code	Website	Street	Postcode	City	State	Country	Contact	E-mail	Phone	Notes		
11.01	North Way Mus	152773	North-W	13 Leek	27342	Buxton			Mr. Red	Redgoo	0173536			
					1								1	
Us	se Resource Pool	Re	place Resour	ce Pool	Add to	the Resour	ce Pool	Add a nev	v Group Reso	urce Pool	Delete	from All Activities		
Us elete fror	se Resource Pool m All Acti	Re	place Resour	ce Pool	Add to	the Resour	ce Pool	Add a nev	v Group Reso	urce Pool	Delete	from All Activities		
Us elete fror Iter:	se Resource Pool m All Act 152773 North Way N	Re	place Resour	ce Pool	Add to	the Resour	ce Pool	Add a nev	v Group Reso	urce Pool	Delete	from All Activities Selected rows:		
Us elete fror tter: Nr.	se Resource Pool m All Act 152773 North Way N Name	Aus Code	place Resour	ce Pool Street	Add to Postcode	City	State	Add a nev	v Group Reso	E-mail	Delete t	from All Activities Selected rows: Notes		
Us elete fror ter: Nr.	ee Resource Pool m All Act 152773 North Way N Name	Mus Code	Website	street	Add to Postcode	City	State	Add a nev	v Group Reso	E-mail	Phone	From All Activities Selected rows: Notes		
Us elete fror ter:	se Resource Pool m All Act 152773 North Way N Name	Aus Code	Website	Street	Add to	City	State	Add a nev	v Group Reso	E-mail	Phone	Selected rows:		
Us elete fror Iter:	ae Resource Pool m All Act 152773 North Way N Name	Aus Code	Website	Street	Postcode	City	State	Add a nev	Contact	E-mail	Phone	Selected rows:		
Us	se Resource Pool m All Act 152773 North Way N Name	Aus Code	Website	Street	Postcode	City	State	Add a nev	Contact	E-mail	Phone	Selected rows: Notes		
Us kelete froi Iter: Nr.	e Resource Pool m All Act 152773 North Way N Name	/lus Code	Website	Street	Postcode	City	State	Add a nev	Contact	E-mail	Phone	Selected rows: Notes		

To manually match the project clients with the employees contained in the resource pool file manually with the employees contained in the resource pool file, please proceed as follows proceed as follows:

- 1. mark the client in the **Project Resources** table, you want to match.
- 2. click on one of the following buttons:
 - 1. click the **Use Resource Pool** button, if you want to use the resource pool project client. **Note:** This button is only enabled if you have selected a position in the resource pool.
 - 2. Click the **Replace Resource Pool** button to replace the resource pool project client with the resource pool project client. **Note:** this button is only enabled if an assignment of the resource pool with the project resource via the code is successful.
 - click the Add to Resource Pool button, to add the project resource to the resource pool (the group properties are the group properties are added to the existing group but not the group name of the project resource).
 Note: This button is only enabled if a group is activated if a group is selected in the Resource Pool table.
 - 4. Click the **Add to resource pool in a new group** button to add the project resource. to add the project resource and group name to the resource pool in a new group.
 - 5. Click the **Delete from all project tasks** button to delete the project resource.
- 3. If necessary, switch to another tab to match the corresponding resources.
- 4. Click on the **OK** button.

CHAPTER

PROJECT VIEWS

6.1 Project views

Rillsoft Project provides about 12 views. You can toggle between the different views doing the following:

• Select the menu item **Start** and click on the view name in the tab Views.

R	3 🧀	₽ \$ ¢		GANTT (CHART			
	FILE	START	PROJECT	FORM	1AT			
		Nariance	e analysis		Role	Employee	Resource chart	* Save
	Gantt chart	Gantt-n	etwork chart	Employee	Other •	Machine	Gantt chart	I manage
		Activity vie	ws —	Resource	ce views	Capacity views	Additional view	User views

Views on / off

Which of the project views do you want to have on display in the tab

In order to define which of the project views should be shown in the tab, do as follows:

• Select the menu item **File > Options > Extended**.

anaral	Extended	
eneral	Extended	
splay	Views	
spiay	Gantt chart	
tended	Variance analysis time	
	Variance analysis effort	
istomize Ribbon	Variance analysis cost	
	✓ Network diagram	
uick Access Toolbar	Gantt-network chart	
	⊠ Role usage	
	✓ Team usage	
	Employee usage	
	Material requirements	
	Machine types usage	
	Machinery usage	
	Human resource capacity planning	
	Machine capacity planning	
	Activity Properties	
	General General	
	✓ Roles	
	Employee	
	☑ Timesheets	
	Material	
	Machine types	
	Machinery	
	✓ Links	
	✓ Format	
	✓ User fields	
	✓ Notes	
	☑ Documents	
	Project/Subproject Properties	
	☑ General	
	✓ Teams	
	✓ Machine types	
	Machinery	
	✓ Headers and footers	
	✓ Format	

- Mark the check box of the views you are interested in the block Views.
- Click OK.

Customize tabs in properties window

In the Activitiy properties area, you can specify which tabs should be visible in the process properties window.

Pr	operties												
	1.2	Name:	Project procedu	ıre					Code:		Fixed:	Duration	*
	General	Roles	Employee	Timesheets	Material	Machine type	Machinery	Links	Format	✓ User fields	Notes	Documents	

In the **Project/sub-project properties** area, you can specify which tabs should be visible in the project/sub-project properties window.

I Name: Prepare project General Preferred team Shared machine types Shared machinery Format Color User fields Notes Documents	Propertie	s									
General Preferred team Shared machine types Shared machinery Format Color User fields Notes Documents	□ 1	Name:	Prepare	project							
	General	Preferred	team	Shared machine types	Shared machinery	Format	Color	User fields	Notes	Documents	

In the Conflict properties area, you can specify which tabs should be visible in the conflict properties window.

Ρ	roperties							
	0							
Г	Late activities	Overallocated resources	Failed resources	Unassigned resources	Partially assigned resources	Portfolio dashboard	Cross-project links	
	Conflict				Nr.	Name		

6.2 Gantt chart

R 🗀 🗔 <	ちぐ 🗆 ፣	GANTT CHART				2016_2_soft					- 🗆 ×
FILE ST	TART PROJECT	FORMAT									^
Gantt chart	'ariance analysis letwork diagram santt-network chart	Employee Role	Employee		* <mark>■ Save</mark> I ➡ Manage ■ Show ▼	Project Resource		Activity •	Structure	▼ ▲ 張-▼ ₩ ◆	Y Cutoff date Current date Y Project start ▼
Acti	ivity views	Resource views	Capacity views	Additional view	User views	Properties	Schedule	Insert	Outline	Edit	Scrolling
Cutoff date: 03.02.16 00:00 <<			•	February 20	016		Ма	irch 2016	A		
Nr. 1.1.5	Name following and upd	Effort Durat ati 10 1.25	Start 15.02.16 09:00	Finish 16.02.16 11:00	05	06	07 08 following and updati	09 ng plans	10	11	12
□1.2 1.2.1 1.2.2 1.2.3 1.2.4 1.2.5 □1.3 1.3.1 1.3.2 1.3.3 1.4 1.5 □1.6	establishing a sot software engineer software test envir software developm software developm non-deliverable so system rejuirem analysis of user in operational conce system requirem system design software requirem	tt 279 10 in 160 5 o 32 2 ne 21 2.63 ne 36 4.5 off 30 1.88 ents 95 5.75 uput 38 2.38 pt 27 3.38 unts 30 1.88 exts 5.25 e.e 30 3.78 pt 30 1.88 attable 5.25 e.e 30 3.5	16.02.16 11:00 16.02.16 11:00 16.02.16 11:00 22.02.16 08:00 26.02.16 10:00 01.03.16 11:00 01.03.16 11:00 03.03.16 15:00 03.03.16 15:00 03.03.16 15:00	01.03.16 11:00 23.02.16 11:00 18.02.16 11:00 18.02.16 11:00 01.03.16 11:00 09.03.16 12:00 09.03.16 09:00 09.03.16 09:00 07.03.16 14:00 10.03.16 14:00 10.03.16 14:00 10.03.16 14:00			software test er	establishin vare engineering env vironment opment library 5 oftware developm 1 , non delive 1 , non delive 1 , non delive 1 , non delive 1 , non delive	ng a software devi irronment rable software sis of user input , operational , system require , system require , system a system , system a	elopment en juirements a l concept ements design equirements softw	analysis s analysis vare implementation
4		-+ 0 0	44 00 40 00:00	47.00 40 47:00						ooffu	
1.3 Name: system requirements analysis Code:											
General	Preferred team	Shared machine type Project calenda	s Shared mar r:	Project settings	User fields	Notes	Color: 🔳 A	Automatic color 🔹			ОК
Start: Finish: Set Cutoff date	Date Time 01.03.16 * 11:00 09.03.16 * 09:00 e: 03.02.16 * 00:00	Project calend Category: - Not selected Status: - Not selected Baseline:	ar • Priori	Image: Stepsing of the stepsi	1 hour in workdays(depe in hours erable for activity for activity(Exam	endent on project c (Example: 150 M ²) ple: 5 man-hours)	Use for subo and activities	rdinated subprojects			Cancel
RESOURCE PO	RESOURCE POOL: http://docalhost/fils6/21 🗧 🖬 🔛 WEEK 1:3 + 🔬										

Application of Gantt charts:

- Visualisation of the project scheduling.
- Visualisation of the project structure.
- Visualisation of the contingency reserve.

• Quick access to the properties of activities and subprojects.

You can use the Gantt chart for to do the following:

- Create and edit activities.
- Link activities.
- Create and edit subprojects.
- Edit the project structure.
- Change the timescale.
- Check contingency reserves.
- Check resource utilization by means of filter settings.

Context menu in the Gantt chart

For the table of activities

Mark a row (activity or subproject) in the table of activities. Once you have marked an activity, you can do as follows:

፠	Cut	Umschalt+Entf					
Ē	Сору	Strg+C					
	Previous activity customize the lates	t start time					
	Successor activity customize the ear	liest start time					
	Abgeschlossen	•					
	Split	•					
	Remove from incompatible group						
	Incoming link delete						
	Outbound link delete	•					

- Cut cut the marked activity
- **Copy** copy the marked activity
- Customize previous activity the latest start time shift all activities that are scheduled for an earlier time than the marked activity to the latest possible start date
- Customize successor activity the earliest start time shift all activities that are scheduled for a later time than the marked activity to the earliest possible start date
- Completed enter the completion percentage of a marked activity
- Split split the marked activity into several activities
- Incoming/Outbound link delete delete the links of the marked activity

In a marked subproject you can do the following activities:
፠	Cut Umschalt+Entf
Ē	Copy Strg+C
+]]	Show detail
Ξ	Level 1
=	Level 2
Ξ	Level 3
Ţ≣	Lowest level
-3	Hide detail
Ī	Hide all
\checkmark	Anfangs- und End-Termine von Vorgängen übernehmen
M	Frühestmögliche Anfangstermine setzen
M	Spätestmögliche Anfangstermine setzen
••	Verzögerte Vorgänge auf Stichtag verschieben
••	Ressourcenauslastung optimieren

- Cut cut the marked subproject
- Copy copy the marked subproject
- Show detail display up to any outline level of the marked subproject detail
- Accept the start and finish dates of activities accept the start date of the first activity and the end date of the last activity for the subproject start and the end of subproject
- Earliest start date this command is active only for subprojects with fixed start and finish dates and shifts all activities in the subproject to the earliest possible start dates.
- Latest start date this command is active only for subprojects with fixed start and finish dates and shifts all activities in the subproject to the latest possible start dates.
- Move delayed activities to cutoff day if the project controlling detects that activities are still not 100% completed, you can shift these activities to the deadline and so update the project's status.
- **Optimize resource utilization** most effective resource allocation, so as to avoid excess and shortfall within the prescribed period

For the chart area

Ġ	Paste	Strg+V
	Select all	Strg+A
	New activity	
	New activity from template file	
	New activity from integration server templat	te
	New subproject	
	New subproject from template file	
	New subproject from integration server tem	plate

In the chart area you can mark an activity / subproject and do the following:

- Paste insert marked acrtivities / subprojects into a project
- Select all mark all activities and subprojects: If activities are subordinated to a subproject, only the subproject will be marked in the chart.
- New activity create a new activity at the position pointed to by the cursor
- New activity from template file insert an already saved activity from template file at the position pointed to by the cursor
- New activity from Rillsoft Integration Server template insert an already saved activity from Rillsoft Integration Server template at the position pointed to by the cursor. Only for the solution with interface to the Rillsoft Integration Server
- New subproject create a new subproject at the position pointed to by the cursor
- New subproject from template file insert an already saved subproject from template file at the position pointed to by the cursor
- New subproject from Rillsoft Integration Server template insert an already saved subproject from Rillsoft Integration Server template at the position pointed to by the cursor. Only for the solution with interface to the Rillsoft Integration Server

6.3 Variance analysis

Variance analysis view shows you the difference between the current project plan and one of the baselines according to the following criteria:



- Time
- Effort
- Cost

Application of variance analysis:

- Visualisation of the difference between target and actual.
- Detailed analysis of all parameter deviations.

You can use the variance analysis to do the following:

- Edit activities and subprojects from the actual plan.
- Change the timescale.

Context menu in the Variance analysis view

Select baseline

Show progress line over start date

Show progress line over finish date

Show only difference

- Select baseline select a project state saved previously as a baseline for comparison.
- Show progress line over start date visualize the schedule deviations between a project state and selected baseline related to start dates.
- Show progress line over finish date visualize the schedule deviations between a project state and selected baseline related to finish dates.
- Show only difference show only activities/projects, where there is the time shift between target and actual.

6.4 Variance analysis time

Variance analysis time shows you the temporal difference between the current project plan and one of the baselines.

Click on **Start > Variance analysis > Time**



Time difference

R 🗀 🖯	ء 🗆 ي	VAF	RIANCE /	ANALYSIS					2016_2_soft					- 🗆 ×
FILE	START PROJ	ECT	FORM	AT										^
		Role		User fields	Start date	P	Project start	Current date	Critical path	Links				
Columns	∠Ψ 3— Sort Renumber	Employ	l ⊠ vee Oth	Notes & links	✓ Finish date		Project end	Milestone in calence Recence time	ar 🗹 Labels	Only difference				
	•		yee Oth	er rooiups •		<u>v</u> (uton uate (
	Data		Tooltip)S	Progress line			SI	iow					
		Cutoff date:	18.04.16	00:00		<< -			April 2016			May 2	2016	Ē
Nr.	Name		Dur	Start	Finish		13	14	15	16 17	18	19	20	21
⊡ 1	software d	evelopme	40	28.03.16 00:00	29.05.16 14	00			/					
⊡ 1.1	project pla	nning and	14	29.03.16 08:00	15.04.16 17	00			ptoject	planning and oversig	pht			
1.1.	.1 software de	evelopme	2 4	29.03.16 08:00	30.03.16 17 01.04.16 17	00		software developm	ent planning		target			
1.1.	2 system test	t planning	6	29.03.16 08:00	05.04.16 17	00	1	system tes	t planning					
1.1.	.3 software in	stallation	4.25	06.04.16 08:00	12.04.16 10	00	1		software insta	llation planning				
1.1.	.4 software tra	ansition pl	5 4	06.04.16 08:00	12.04.16 17 11.04.16 17	00			software transit	ion planning				
1.1.	.5 following a	nd updati	3	13.04.16 08:00	15.04.16 17	00	actual		Tollowin	g and updating plans	5			
⊡ 1.2	establishin	ig a softw	10.38 12.5	18.04.16 08:00	02.05.16 11: 04.05.16 12	00	uotuui		/ =		establi	ishing a software	development	environment
1.2.	.1 software er	ngineering	5 6	18.04.16 08:00	22.04.16 17 25.04.16 17	00				softwa	ire engineering env	ronment		
1.2.	2 software te	st environ	2 5	18.04.16 08:00	19.04.16 17 22.04.16 17	00				sontware tes	tenvironment			
4														•
- 🐴	1.1 Name: s	software deve	elopment	planning					Code:	Baseline: E	3P 2			
General	Costs 🗸	' Roles 🛛 🗸 I	Employee	e Material	Machine type	•	Machinery							
	Start		Finish		Effort		Duration							
l arget:	29.03.16 08:0	30	.03.16 17	7:00	16		2							
Actual:	29.03.16 08:0	01.	.04.16 17	7:00	32		4							
Difference		day		+2 day	+16 Ph		+2 A	AT						
RESOURCE	POOL: http://loca	alhost/ris6/21									3		3 •	i +

Application of Variance analysis time:

- Visualization of the temporal difference between target and actual.
- Graphical representation of schedule deviations.
- Rapid detection of time deviations from the plan and fact by means of a progress line.

Note:

• The first row lists the properties of the scheduled activities and subprojects, while the second row lists the properties of the required activities and subprojects. Parameter deviating from the baseline are marked in yellow.

6.5 Variance analysis effort

Variance analysis effort shows you the difference between a current effort and the effort saved in a baseline.

Click on Start > Variance analysis > Effort



Effort difference

R 🗀		o (, □ ±	VARIAN	ICE ANAL	YSIS						2016_2_	soft						- 🗆	×
FILE	ST	ART PROJECT	FC	DRMAT	/														^
Gantt	💼 Ne	etwork diagram antt-network chart	() T	ime ffort	Employe	Rol	e 🏭 m 😤	Employee Machine	.ih. ~~~~			Project	0× 25×	50× 75× 100×	Activity *	Structure	▼ ▲ ▼ ~ ▼	Cutoff dat	e ite rt v
chart	Activ	rity views	Variance	analysis	Reso	urce view	s Cap	acity views	 Additional	view Use	er views	Properties	Sc	hedule	Insert	Outline	Edit	Scrolling	
L		-	Cutoff dat	10 04 1	E 00-00									•					
			Cutori dui	0. 10.04.1	00.00								April 201	6			May	2016	
Nr.		Name		Effort	Effort d	Durat	Start	Finish		13	1	4	15	16	17	18	19	20	-
⊡ 1		software develop	pment	1252	+114	40	28.03.16	29.05.16		40 64	1:	36	70	280	84	64	167	18	L
⊟ 1.1		project planning	and ov	270		14	29.03.16	15.04.16		48 64	1:	36	86 70						
1	1.1.1	software develop	ment p	16 32	+16	2 4	29.03.16	30.03.16 01.04.16		16 32									
- <i>i</i>	1.1.2	system test plann	ning	48		6	29.03.16	05.04.16	1	32	1	6		💙 tar	get effort				
1	1.1.3	software installat	ion pla	102		4.25	06.04.16	12.04.16	i		7	2	30						
<i>i</i> –	1.1.4	software transitio	n plan	80 64	-16	5 4	06.04.16	12.04.16 11.04.16			4	8	32 16						
1	1.1.5	following and upo	dating	24		3	13.04.16	15.04.16	1				24						
□ 1.2	!	establishing a so	ftware	290 404	+114	10.38 12.5	18.04.16	02.05.16 04.05.16	act	lal effo	rt			232 280	52 84	6 40			
	1.2.1	software enginee	ring en	160 192	+32	5 6	18.04.16	22.04.16 25.04.16		aarono				160	- 32				
	2.2	software test envi	ironment	32 80	+48	2 5	18.04.16	19.04.16 22.04.16						32 80					-
•		1												•					Þ
-	1.1.1	Name: statwa	are develop	oment plar	nning							Code		Baseline: B	P 2				
Gene	eral	Costs 🗸 Roles	s Em	ployee	Materia	м	achine type	Machir	nery										
Ne		Namo		odo	Working a	mun to	Polo a	alification	Conto	Producti	Linkson	an Abaanaa	. E#a	ut Nogativ	Tatal cost				
191.		Think	u	Jue	14.001 We	ioup •ite ist	15.001 a	nalyst	40.00	100	% 100)%		16 0	640.00				
20	.02	Think			14.001 We	st	15.001 a	nalyst	40.00	100	% 100	1%	3	32 0	1 280.00				
RESOUR	RCE PO	OL: http://localhost	/ris6/21												E	WEEK 1			+ .::

Application of Variance analysis effort:

• Visualization of the difference between target effort and actual effort in the time scale.

6.6 Variance analysis cost

Variance analysis cost shows you the difference between current costs and the costs saved in a baseline

Click on **Start > Variance analysis > Cost**



Cost difference

R 🧀	85	¢ □ ₹	VARIANO	E ANALYSI	5				2016	_2_soft							- 🗆 ×
FILE	ST/	RT PROJECT	FOF	RMAT													^
Gantt chart	Re Ga Activ	twork diagram ntt-network chart ty views	 Tim Effe Cost Variance at 	ort st nalysis	nployee Resource viev	le the En am the Ma her T /s Capaci	nployee achine ty views A	.th ▼ ☆▼ 〒 dditional view	T I User views	Proje	ect ource	25× 50×	75× 100×	t Activity → t Subproject → tao Link → Insert	Structure Outline	▼ ▲ 、 ▼ ▼ M ◆ Edit	Vertife the current date Current date Project start ▼ Scrolling
L		Cutoff	f date: 18.04.	16 00:00		~					v						
Ne		Name	Start	Finish	Corte	Corte diff	12			April 201	6		47	40	May 20	16	
E 1		software devel	28.03.16	29.05.16	92 570.00	+6 670.00	2240	167	4 760	11270	11320		7020	6220	10660	6455 2475	- 4260
⊡ 1.1		project plannin	29.03.16	15.04.16	30 270.00 28 750.00	-1 520.00	2240 2880	167	760	11270 9110	15400		0400	0100		2113	1300
1	1.1.1	software devel	29.03.16	30.03.16 01.04.16	640.00 1 280.00	+640.00	640 1280	∢ •									
ĺ	1.1.2	system test pla	29.03.16	05.04.16	2 400.00		1600	8(00								
1	1.1.3	software install	06.04.16	12.04.16	13 430.00			94	80	3950			target o	ost			
1	1.1.4	software transit	06.04.16	12.04.16 11.04.16	10 800.00 8 640.00	-2 160.00	N.	64	80	4320 2160							
i -	1.1.5	following and u	13.04.16	15.04.16	3 000.00		actual	cost		3000							
⊡ 1.2	2	establishing a	18.04.16	02.05.16	19 150.00 27 340.00	+8 190.00					11320 13480		7020 8460	810 5400			
j.	1.2.1	software engin	18.04.16	22.04.16 25.04.16	7 200.00 8 640.00	+1 440.00					7200		1440				
_ \	1.2.2	software test e	18.04.16	19.04.16 22.04.16	1 440.00 3 600.00	+2 160.00					1440 3600						
																	•
	1. 1	Name: softwa	ire developm	ent plannin	9						Code:	Base	eline: BF	2			
Gen	eral	Costs 🗸 Roles	🗸 Emplo	oyee	Material N	lachine type	Machiner	у									
		Fixed	Roles			Employ	res	Materials	Mach	ine types	Ma	ichinery		Liquidity			
		0.00	640.00			640.	00	0.00		0.00		0.00		0.00			
		0.00	1 280.00			1 280.	00	0.00		0.00		0.00		0.00			
			+640.00			+640.	00										
RESOUR	RCE PO	DL: http://localhost/	/ris6/21											3	WEEK 1	3	

Application of Variance analysis cost:

• Visualization of the difference between target costs and actual costs in the time scale.

6.7 Variance analysis activity properties

If you click on a row in the table at a Variance analysis view, you can see the differences between the current state of the activities and a state saved in the base plan in the properties window.

R 🧀	¢ 🖬 🌶 ¢ 🗖		VARIAN	CE ANALYSIS TIME			E	Building planning					- 🗆	×
FILE	START PROJE	ECT		FORMAT										~
Gantt chart	Cost	Em	ployee	Machine	.th * .22 * 	* I	ा Project ≧ Resource ∎Info	0× 25× 50× 75× 10	Actions and the second	ivity = oproject = k =	tin	▼ ▲ 1× • ▼ # ◆	Cutoff dat Current da	e ite rt *
Activity	views Variance analys	is Res	source viev	vs Capacity views	Additional view	User views	Properties	Schedule	In	sert	Outline	Edit	Scrolling	
	Ci	utoff da	te: 08.05.2	3 08:00	<<	v		•	•					• •
Nr.	Name 🥒	Effort	Duration	Start	Finish	19	May 2023	21	22	23	June 20	123	15	26
I 1	Dhaco 1	512	30	00.05.23.00.00	20.06.23.17:00	- 15	20	21	22	25	24			P
		-		-	-				Audit cons	struction s	hedule			
2	Audit constructio	0	0	29.05.23 08:00	29.05.23 08:00			•						
3	Invoicing for pa	0	0	29.06.23 17:00	29.06.23 17:00									*
4	Phase 2	528	28	10.05.23 08:00	16.06.23 17:00				-			Phase 2		
4.1	Create the order	80 112	5 7	10.05.23 08:00	16.05.23 17:00 18.05.23 17:00		C	reate the order plan						
4.2	Planning the des	32	4	23.05.23 08:00	26.05.23 17:00			Plan	ning the desi	ign phase				
4.3	Building plannin	96 64	6 8	24.05.23 08:00	31.05.23 17:00 02.06.23 17:00				B	uilding plar	nning presentatio	n		
4.4	Set up the docu	40	5	24.05.23 08:00	30.05.23 17:00				Set up ti	he docume	nt control			
4.5	Setting up the pr	40	5	24.05.23 08:00	30.05.23 17:00				Setting (up the proj	ect monitoring			
4.6	Project cost contr	80	10	24.05.23 08:00	06.06.23 17:00					Pro	ject cost control			
4.7	Complete the re	160	10	05.06.23 08:00	16.06.23 17:00							Complete t	he request list	t
5	Invoicing for pha	0	0	16.06.23 17:00	16.06.23 17:00							Invoicing f	or phase 2	
± 6	Phase 3	392	29	12.06.23 08:00	20.07.23 17:00									
7	Invoicing for pha	0	0	20.07.23 17:00	20.07.23 17:00									Ŧ
														- F

These differences can be tracked on the following tabs:

- General
- Costs
- Roles
- Employee
- Material
- Machine type
- Machinery

General

Propertie	S						
4.1	Name: Create the	e order plan		Code:	Baseline:	Building planning BP11	
General	Costs 🗸 Roles	✓ Employee ✓ Material	✓ Machine type	 Machinery 			
	Start	Finish	Effort	Duration			
Target:	10.05.23 08:00	16.05.23 17:00	80	5			
Actual:	10.05.23 08:00	18.05.23 10:00	56	7			
Difference:	day	+1.71 day	-24 man	+2 work-d			
							Help

Here are the deviations and a summed difference between planned and current values of an activities for

- start and finish dates
- the effort
- the duration

can be seen.

Costs:

rope	rties									
	4.1	Name:	Create the order plan			Code:	Baseline:	Building planning BP11		
Gene	ral	Costs	✓ Roles ✓ Employee	✓ Material	🗸 Machine type 🛛 🗸	Machinery				
		Fixed	Roles		Employes	Materials	Machine types	Machinery	Liquidity	
		0.00	3 600.00		0.00	0.00	0.00	0.00	0.00	
		0.00	2 800.00		2 800.00	0.00	9 800.00	9 800.00	0.00	
				-800.00			+9 80	0.00		
										Help

On the Costs tab you can see how large the target-actual deviations are for the resource costs.

operties									
4.1	Name: Cre	eate the order p	plan		Cod	e:	Baseline: Building planning	BP11	
General	Costs 🗸 R	oles 🗸 Emp	ployee 🗸 Material	✓ Machine t	ype 🗸 Ma	chinery			
Nr.	Role	Code	Qualification	Costs	Quantity	Utilization	Effort	Total cost	
13.001	manager manager			60.00 60.00	1	100 % 100 %	40 56	2 400.00 2 800.00	
16.001	support support			30.00 30.00	1 1	100 % 100 %	40 56	1 200.00 0.00	
									H

Here you get an exact comparison between planned and actual roll requirements in one activities.

Employee

roperties	S									
4.1	Name:	Create the order	plan	(Code:		Baseline:	Building planning	3P11	
General	Costs	✓ Roles	ployee 🗸 Material 🔩	🖌 Machine type 🛛 🗸	Machinery					
Nr. N	Name	Code	Working group - team	Role - qualification	Cos	ts Productivity	Utilization	Absences E	ffort Negativ e.	
12.01 s	Superman		- 12.001 South	- 13.001 manager	50.0		100 %		56	2 800.00

Which staff members were originally scheduled and which are currently assigned to an activities can be seen in the **Employee** tab.

Material

Properties							
4.1	Name: Create the order pla	an	Code:		Baseline: Building pla	anning BP11	
General	Costs 🗸 Roles 🗸 Emplo	oyee 🗸 Material 🗸 Machine type	 Machinery 				7
Nr.	Material group C	Code Material type	Unit	Costs	Amount	Total cost	
12.002	 Metals	 Stainless steel	100 kg	267.00	1	267.00	
13.001	 Non-ferrous metals	 Auminium	- 1 kg	20.00	1	20.00	
							Help

Here you get an exact comparison between planned and actual material consumption in one activities.

Machine type

operties	5						
4.1	Name: Create	the order plan		Code:	Ba	seline: Building planning BP11	
General	Costs 🗸 Roles	✓ Employee	Material 🗸 Mach	ine type 🗸 Machine	ny		
Nr.	Machine groups	Code	Machine type	Costs	Utilization	Quantity	Total cost
12.001	- Rotate machine			85.00	100 %	1	4 760.00
13.001	- Milling machine		-	90.00	100 %	i	- 5 040.00

Here you get an exact comparison between planned and actual machine type requirements in one activities.

Machinery

4.1 Name: Create the order plan				
	Code:	Baseline:	Building planning BP11	
General Costs 🗸 Roles 🖌 Employee	e 🗸 Material 🗸 Machine type 🖍 Machinery]		
Nr. Machine name Code V	Working group - team Machine group - Machine type	Costs	Utilization	Total cost
12.01 machine 1	- 12.001 Rotate machine	85.00	100 %	4 760.00
 13.01 machine 2	- 13.001 Milling machine	90.00	- 100 %	5 040.00

Here you get an exact comparison between planned and actual machine requirements in one activities.

6.8 Variance analysis of subproject properties

If you click on a row in a Variance analysis view in the table, you can have the differences between the current state of a subproject and a state saved in the base plan shown in the properties window.

R 🧀	\$ 6 5 ¢	"	VARIANCE A	ANALYSIS TIME			B	uilding planning				- 🗆	×
FILE	START F	ROJECT	FOF	RMAT									^
Gantt chart	Contractions of the second sec	ort st	Employee	& Employee	.h.* ≫.* ⊊	*= I=	Froject Resource Info	0× 25× 50× 75× 100×	t Activity ▼ T Subproject ▼ top Link ▼	Structure	▼ ▲ 張 - ▼ ₩ ◆	Cutoff da Current d	te ate art =
Activity	views Variance a	nalysis	Resource views	Capacity views	Additional view	User views	Properties	Schedule	Insert	Outline	Edit	Scrolling	
	Cuto	ff date:	08.05.23 08:00		<< 🔽			•			•	2023	<u> </u>
Nr.	Name	Dura	Start	Finish	19	May 2023	21	22	23 ,	une 2023 24 , 25		26	27
⊟ 1	Phase 1	39 45	08.05.23 08:00	29.06.23 17:0 07.07.23 17:0	0								
1.1	Cost estimat	1	08.05.23 08:00	08.05.23 17:0	0 Cost estin	nate							
1.2	Project proce	10 14	10.05.23 08:00	23.05.23 17:0 29.05.23 17:0	0			Project proced	ure				
1.3	Completing t	8	17.05.23 08:00	26.05.23 17:0	0			Completing the const	ruction schedule				
1.4	Create task li.	17	26.05.23 08:00	19.06.23 17:0	0					Create	e task lists		
1.5	Order	19 25	05.06.23 08:00	29.06.23 17:0 07.07.23 17:0	0								
2	Audit constru	0	29.05.23 08:00	- 29.05.23 08:0	0			Audit construct	uon schedule				
3	Invoicing for	0	29.00.23 17:00 07.07.23 17:00	29.06.23 17:0 07.07.23 17:0	0							•	
⊟ 4	Phase 2	28 33	10.05.23 08:00	16.06.23 17:0 23.06.23 17:0	0		-				Phase 2		
4.1	Create the or	7 10	10.05.23 08:00	10.05.23 17:0 23.05.23 17:0	0		Crea	ate the order plan	_				
4.2	Planning the	4	23.05.23 08:00	26.05.23 17:0	0			Planning the design p	hase				
4.3	Building plan	8	24.05.23 08:00 30.05.23 08:00	02.06.23 17:0 08.06.23 17:0	0		-		Building pla	anning presentation	n		
4.4	Set up the do	5	24.05.23 08:00 30.05.23 08:00	30.05.23 17:0 05.06.23 17:0	0		_		Set up the docum	ent control			
4.5	Setting up th	5	24.05.23 08:00 30.05.23 08:00	30.05.23 17:0 05.06.23 17:0	0				Setting up the pro	oject monitoring			
4													Þ
	1 Name:	Phas	e 1			Code		Baseline:	Building planning BP	15			
Gen	eral Costs	Sha	red machine types	Shared mac	hinery								
	Start		Finish		Effort			differen	ces between	the current			
Target	08.05.23	08:00	29.06.23 17:	00	512			saved in	n the base pla	and a state			
Actual	08.05.23	08:00	07.07.23 17:	00	592			and and					
Differe	nce:	d	lay	+8 day	+80 man							Ha	ln.
								-					۳
CLIENT:	EN 2016 🛛 🗘								E 🖪	WEEK 1 : 2 * -		+ 100	

These deviations can be tracked on the following tabs:

- General
- Costs
- Shared machine types
- Shared machinery

General

1 Name: Phase 1 Code: Baseline: Building planning BP15 General Costs Shared machine types Shared machinery Start Finish Effort Target: 08.05.23.08.00 29.05.23.17.00 512	Properties								
General Costs Shared machine types Shared machinery Start Finish Effort Target: 08.05.23.08.00 29.06.23.17.00 512	— 1	Name: Phase 1	Code:	Baseline: Building	g planning BP15				
Start Finish Effort Target: 08.05.23.08.00 29.06.23.17.00 512	General Costs Shared machine types Shared machinery								
Target: 08.05.23.08.00 29.06.23.17.00 512		Start Finish	Effort						
0.0.2 0.00 20.02 17.00 012	Target:	08.05.23 08:00 29.06.23 17:00	512						
Actual: 08.05.23 08:00 07.07.23 17:00 592	Actual:	08.05.23 08:00 07.07.23 17:00	592						
Difference: day +8 day +80 man	Difference:	day +8 day	+80 man						
Help						Help			

Here are the deviations and a summed difference between planned and current values of a sub-project for

• start and end dates

- the effort
- the duration

can be seen.

Costs

I Name: Phase 1 Code: Baseline: Building planning BP15 General Costs Shared machine types Shared machine types Shared machine types Materials Machine types Machine types Liquidity 0.00 19 680.00 9 360.00 0.00 224 480.00 6 800.00 0.00 0.00 23 040.00 9 360.00 0.00 27 200.00 9 520.00 0.00 + 3 360.00 + 2 720.00 + 2 720.00 + 2 720.00 + 2 720.00 + 2 720.00	Properties							
General Costs Shared machine types Shared machinery Fixed Roles Employes Materials Machine types Machinery 0.00 19 680.00 9 360.00 0.00 24 480.00 6 800.00 0.00 0.00 23 040.00 9 360.00 0.00 27 200.00 9 520.00 0.00 +2 720.00 +2 720.00 +2 720.00 +2 720.00 -10 -10	1 Name:	Phase 1		Code:	Baseline:	Building planning BP15		
Fixed Roles Employes Materials Machine types Machinery Liquidity 0.00 19 680.00 9 360.00 0.00 24 480.00 6 800.00 0.00 0.00 23 040.00 9 360.00 0.00 27 200.00 9 520.00 0.00 +3 360.00	General Costs	Shared machine types	Shared machinery					
0.00 19 680.00 9 360.00 0.00 24 480.00 6 800.00 0.00 0.00 23 040.00 9 360.00 0.00 27 200.00 9 520.00 0.00 +3 360.00 +3 360.00 +2 720.00 +2 720.00 +2 720.00 +2 720.00	Fixed	Roles	Employes	Materials	Machine types	Machinery	Liquidity	
0.00 23 040.00 9 360.00 0.00 27 200.00 9 520.00 0.00 +3 360.00 +2 720.00 +2 720.00 +2 720.00 +2 720.00	0.00	19 680.00	9 360.00	0.00	24 480.00	6 800.00	0.00	
+3 360.00 +2 720.00 +2 720.00	0.00	23 040.00	9 360.00	0.00	27 200.00	9 520.00	0.00	
		+3 360.00			+2 720.00	+2 720.00		
								Hel

On the **Costs** tab you can see how large the target-actual deviations are for the resource costs.

Shared machine types

roperties										
1	Name: Phase 1				Code:		Baseline:	Building planning BP15		
General	Costs Shared mad	chine types	Shared machinery							1
Nr.	Machine groups	Code	Machine type	Costs	Quantity	Utilization Activit	ties	Duration	Total cost 🔺	
12.001	- Rotate machine			85.00	i	100 % 1.2;1.	.3	112	9 520.00	
13.001	- Milling machine	-		90.00	i	100 % 1.1;1.	.3;1.5	272	24 480.00	
	-	-	•	-	-			-	- 🔻	Hel

Here you get an accurate comparison between planned and actual needs for common machine types in a sub-project.

Shared machinery

operties							
1 Name:	Phase 1		Code:		Baseline:	Building planning BP15	
General Costs	Shared machine	e types Shared mach	inery				
Nr. Machine na	me Code	Working group - team	Machine group - Machine type	Costs	Utilization Activities	Duration	Total cost 🔺
12.01 machine 1			- 12.001 Rotate machine	85.00	100 % 1.2;1.3	112	0.00
13.01 machine 2			- 13.001 Milling machine	- 90.00	 100 % 1.1;1.3;1.5	272	0.00
-	-	-	-	-		-	- 🔻

Here you get an exact comparison between planned and actual needs for common machinery in a sub-project.

6.9 Network diagram

R 🗀 🗔	うぐ 🗆 -	NETWORK DIAGRAM			2016 portfolio					- 🗆	×
FILE	START PROJECT	FORMAT									^
1 2 3 Renumber	□ Role □ Cus ² □ Teams ✓ Not □ Employee Other T	tom fields Project sta es & links Project en ooltips	art ☑ Current date	n ⊻ Links							
Data	Tooltips	244	Show	2.1.7	1						
2.1 project	t parong and a weight	Links an augum Billion Billion	Alder georg Hans to balan georg	1200 1100 1100 1200 1100 1200 120010							
and a second	lang a shaa dadgeed antoned				3.2 4.50 4.50 4.50	227 ahbar da signer the 1400 100 1400 100	0.2.4 0-0-041 with a shore 1-050 ***** 1-051** 1-051**				1.0
- 23 2000	n nguranarka angua							9.5.1 andysis afficientingui 1100 1500 360016 010516	522 522 1500 0400 110545 070545 523 8,1347 Ag2/Inmana 1500 1600 110545 050545		 IN INVESTIGATION INVESTIGATION
= 15 softwa	are implementation and unit teating									561 cotivare implementation	-
•											Þ
Properties											
RESOURCE	E POOL: http://localhost/r	is6/21							4:1	— I—	+t

Application of the network diagram:

• Visualisation of the technological structure of the project.

You can use the network diagram to do the following:

- Create and edit activities.
- Link activities.
- Create and edit subprojects.

Context menu in the Network diagram view

፠	Cut Umschalt+Entf
Ē	Copy Strg+C
+=	Show detail
Ξ	Level 1
Ξ	Level 2
Ξ	Level 3
Ţ≣	Lowest level
-3	Hide detail
Ī	Hide all
~	Anfangs- und End-Termine von Vorgängen übernehmen
M	Frühestmögliche Anfangstermine setzen
M	Spätestmögliche Anfangstermine setzen
••	Verzögerte Vorgänge auf Stichtag verschieben
••	Ressourcenauslastung optimieren

In the subproject area you can do the following activities:

- Cut cut the marked subproject
- Copy copy the marked subproject
- Show detail display up to any outline level of the marked subproject detail
- Hide detail hide up to any outline level of the marked subproject detail
- Accept the start and finish dates of activities accept the start date of the first activity and the end date of the last activity for the subproject start and the end of subproject
- Earliest start date this command is active only for subprojects with fixed start and finish dates and shifts all activities in the subproject to the earliest possible start dates.
- Latest start date this command is active only for subprojects with fixed start and finish dates and shifts all activities in the subproject to the latest possible start dates.
- Move delayed activities to cutoff day if the project controlling detects that activities are still not 100% completed, you can shift these activities to the deadline and so update the project's status.
- **Optimize resource utilization** most effective resource allocation, so as to avoid excess and shortfall within the prescribed period

For the chart area

Ê	Paste	Strg+V						
	Select all	Strg+A						
	New activity							
	New activity from template file							
	New activity from integration server template							
	New subproject							
	New subproject from template file							
	New subproject from integration server ten	nplate						

In the chart area you can mark an activity / subproject and do the following:

- Paste insert marked acrtivities / subprojects into a project
- Select all mark all activities and subprojects: If activities are subordinated to a subproject, only the subproject will be marked in the chart.
- New activity create a new activity at the position pointed to by the cursor
- New activity from template file insert an already saved activity from template file at the position pointed to by the cursor
- New activity from Rillsoft Integration Server template insert an already saved activity from Rillsoft Integration Server template at the position pointed to by the cursor. Only for the solution with interface to the Rillsoft Integration Server

In the subproject area, you can do the following:

- New subproject create a new subproject at the position pointed to by the cursor
- New subproject from template file insert an already saved subproject from template file at the position pointed to by the cursor
- New subproject from Rillsoft Integration Server template insert an already saved subproject from Rillsoft Integration Server template at the position pointed to by the cursor. Only for the solution with interface to the Rillsoft Integration Server

6.10 Gantt-network chart

🚯 🚔 🖶 🦘 🗢 🗂 🔻 🛛 GANTT-NETWORK CHART	2016 portfolio – 🗆 🗙
FILE START PROJECT FORMAT	
1 3 3 2 3 7 _	Project start Current date Critical path Vinks Project end Milestone in calendar Labels Cutoff date Reserve time
Data Activity height Tooltips	Show
	▼ ♦
Cutoff date: 10.02.16 00:00 January 2016	February 2016 March 2016 Control Contr
02	
□ 2	2.2 task 4
□ 2.1 subproject 1	2.1.1 task 3
□ 3 new_software development process	3.4 system desay, 3.7 unit inted 3.8 gl3.9 system qd3.11 software
 3.1 project planning and oversight 	3.1.7 folk 3.1.2 system td3 ,3.1.4 software 3.1.5 soft
3.2 establishing a software development environment	
Properties	4
RESOURCE POOL: http://localhost/ris6/21	🔁 📰 🔜 WEEK1:3 🗉

Application of the Gantt-network chart:

• Visualisation of time scheduling and the technological structure of the project.

You can use the Gantt-network chart to do the following:

- Create and edit activities.
- Link activities.
- Create and edit subprojects.
- Edit the technological structure.

Context menu in the Gantt-network chart view

፠	Cut Umschalt+Entf
Ē	Copy Strg+C
+ <u>=</u>	Show detail
Ξ	Level 1
=	Level 2
=	Level 3
↓ ≣	Lowest level
-3	Hide detail
ÌŢ	Hide all
\checkmark	Anfangs- und End-Termine von Vorgängen übernehmen
M	Frühestmögliche Anfangstermine setzen
M	Spätestmögliche Anfangstermine setzen
••	Verzögerte Vorgänge auf Stichtag verschieben
••	Ressourcenauslastung optimieren

In the subproject area you can do the following activities:

- Cut cut the marked subproject
- Copy copy the marked subproject
- Show detail display up to any outline level of the marked subproject detail
- Hide detail hide up to any outline level of the marked subproject detail
- Accept the start and finish dates of activities accept the start date of the first activity and the end date of the last activity for the subproject start and the end of subproject
- Earliest start date this command is active only for subprojects with fixed start and finish dates and shifts all activities in the subproject to the earliest possible start dates.
- Latest start date this command is active only for subprojects with fixed start and finish dates and shifts all activities in the subproject to the latest possible start dates.
- Move delayed activities to cutoff day if the project controlling detects that activities are still not 100% completed, you can shift these activities to the deadline and so update the project's status.
- **Optimize resource utilization** most effective resource allocation, so as to avoid excess and shortfall within the prescribed period

For the chart area

Ġ	Paste	Strg+V
	Select all	Strg+A
	New activity	
	New activity from template file	
	New activity from integration server templa	te
	New subproject	
	New subproject from template file	
	New subproject from integration server ten	nplate

In the chart area you can mark an activity / subproject and do the following:

- Paste insert marked acrtivities / subprojects into a project
- Select all mark all activities and subprojects: If activities are subordinated to a subproject, only the subproject will be marked in the chart
- New activity create a new activity at the position pointed to by the cursor
- New activity from template file insert an already saved activity from template file at the position pointed to by the cursor
- New activity from Rillsoft Integration Server template insert an already saved activity from Rillsoft Integration Server template at the position pointed to by the cursor. Only for the solution with interface to the Rillsoft Integration Server
- New subproject create a new subproject at the position pointed to by the cursor
- New subproject from template file insert an already saved subproject from template file at the position pointed to by the cursor
- New subproject from Rillsoft Integration Server template insert an already saved subproject from Rillsoft Integration Server template at the position pointed to by the cursor. Only for the solution with interface to the Rillsoft Integration Server

6.11 Role

You can structure role usage by clicking the menu item **Start > Outline > Structure** using the following criteria:

- Role -> Project
- Project -> Role



RB 🧀 .	50 .	ROLE USAGE						2016 po	rtfolio							-	□ ×
FILE	START PROJECT	FORMAT	□ User ☑ Note	fields s & links	面 Maxim 山 Effort	um 🖞 FTI	E 🗆	Project start Project end ✓	Current da	ate in calendar	□ Criti r ☑ Labe	cal path Is	✓ Total	utilization ty chart	Employee	C Activ	itys in a row up by role
Columns	Sort Renumber Excel	Employee	Other To	ooltips 🔹	de Averag	e	\checkmark	Cutoff date	Reserve tir	ne			Activit	ty value			
	Data	T	ooltips		Resour	ce units					Show					0	Group
											• •				•		A
	Cutoff date: 12.01.17	09:00	<<				Ja	nuary 2016						February 2	016		
	No			53		01	0	2 0	13	04	(05	06		07	08	09
Nr.	Name		Effort	140	1	08	17	6 16	82	238	6	36	90		110	63	201
	programmer - C++		1097	24		35	28	3 5	3	33	1	9	28		21	12	36
	programmer - PHP		288			0									3/	39	40
■ 13.003	manager		294	32		5	D. 1.	2	•	50		2	4		21		37
111	software development	nlanning	18	32				•		50		۷.					
131	analysis of user input	promiting	19	anal	ysis of use	r input											
1.3.2	operational concept		27'				ор	erational conce	ept								
1.11	software product evalu	ation	34								softv	vare pro	luct evalu	uation			
2.1.1	software development	planning	18'							so	ftware d	evelopme	ent planni	ing			
2.3.1	analysis of user input		19														ar
2.3.2	operational concept		27														
2.12	software product evalu	ation	34														
4.1.1	software development	planning	18														
4.3.1	analysis of user input		19														
4.3.2	operational concept		27														
4.11	software product evalu	ation	34														
	designer		882	30		31		2	0	82	2	4	15				37
	analyst		1459	43		23	2	7 4	0	64	4	1	43		31	12	73
	support		332				5	4 4	5	8							
•																	▼
<u> </u>	3.001 Name: manager														Code:		
Activitie	es Role																
Nr.	Project		Fixed		Duration	Start	~	Finish	Role		Quantity	Utilizat	Effort	Notes			OK
1.1.2	software deve	elopment proc	Duration		38	23.11.15 (00:80	27.11.15 15:00	13.001 ma	nager							Cancel
☑ 1.1.1	software deve	elopment proc	Duration		18	23.11.15 (00:80	25.11.15 10:00	13.001 ma	nager	1	100	18				
1.1.3	software deve	elopment proc	Duration		9	27.11.15	15:00	30.11.15 16:00	13.001 ma	nager							
	software deve	elopment proc	Duration		18	03.12.15	16:00	08.12.15 09:00	13.001 ma	nager							
	software devi	elopment proc	Duration		30	03.12.13	19-00	0.12.15 11:00 08.12.15 15:00	13.001 ma	nager						•	
🗌 Only a	ssigned activities																
RESOURCE	POOL: http://localhost/ris	5/21	STR	JCTURE: Rol	le								E 🛽	🔒 📖 🖬 Wi	EK 1 : 2		···· +:

Applications for the Role usage view:

- Display of the project's demand for roles in the project.
- Ressource allocation from the perspective of roles.
- Calculation of the usage of every single role.
- Calculation of the total efforts and total costs of every single role.
- Calculation of the FTE of every single role.
- Visualisation of the roles allocation in activities.

You can use the Role usage view for the following:

- Assign selected activities to a role.
- Analyse the role usage by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.

Additional columns in the table

To switch on additional columns in the table, click the Tab format for a selected view.



Real Column arrangement \times Name Unit Description Up ⊠ Nr. Nr. Down ✓ Name Role Code Code Category Category Reset Priority Priority Status Status Subproject Subproject OK Duration AT Duration Start Start (date + time) Cancel Start Start (date) 🗌 Finish Finish (date + time) 🗌 Finish Finish (date) 2 Utilization Utilization € per Hour Cost per hour Cost per hour Quantity Quantity Effort PT Effort Total cost Total cost € Balance PT Balance Notes Notes

Context menu in the Role usage view

ďĿ	Show maximum usage per unit of time
₫	Show average usage per unit of time
۵.	Show effort per unit of time

- Show maximum usage per unit of the time the maximum required number of personnel resources for each of the roles / qualifications per day, week, etc.
- Show average usage per unit of the time the average required number of personnel resources for each of the roles / qualifications per day, week, etc.
- Show effort per unit of the time planned effort in employee hours (or employee days, respectively) per day, week, etc.

6.12 Role usage with effort





6.13 Role usage and FTE

Role usage and Full Time Equivalent in the timescale.

R 🗀	5 ∂∓	ROLE USAGE					2016 p	ortfolio						-		×
FILE	START PROJECT	FORMAT														^
Columns	A Z Sort Renumber Excel	 Role Teams Employee 	□ Use ✓ Not Other 1	r fields es & links ooltips 🝷	d Maxim d Effort d Averag	jum 💾 FTE 🗆	Project start Project end Cutoff date	 ✓ Current date ✓ Milestone in calence ☐ Reserve time 	Crit	ical path els	 ✓ Total Activ ✓ Activ 	utilization [ity chart [ity value	Employee Period	Act Gro	ivitys in a oup by rol	le
	Data	1	ooltips		Resour	rce units			Show	· . /	7				Group	
				7			N			1					٦	-
	Cutoff date: 12.01.17	09:00	<<	De	cember 2015				Januar	y 2016					F	ebru
				50	51	52	53	01	02		03	04	05		06	
Nr.	Name		Effort	0.6	4	2	5.8	4.4	5.7		5.9	7.8	2.8		3.7	
	programmer - C++		297	0.1	2	0.6	1	1.4	0.9		1.7	1.1	0.6		1.1	
11.002	programmer - PHP		36		0.6	0.8										
⊟ 11.003	programmer - V.Basic		137	0.4	0.4		0.5	0.8	1.7		0.8	<0.1			0.2	
1.1.7	following and updating	plans	15	0.4	0.1											
1.2.2	software test environm	ent	10		0.3											
1.5	software requirements	analysis	30				0.5	0.8								
1.6.2	unit testing		31						0.9		0.1					
1.7	unit integration and tes	sting	26						0.8							
1.10	software configuration	managem	21								0.7	<0.1				
2.1.8	following and updating	plans	4												0.2	
	manager		98				1.3		0.5			1.6	0.1			
∓ 14.001	designer		202				1.2	1.3			0.7	2.7	0.8		0.6	
 ∓ 15.001	analyst		328	0.1	1	0.5	1.8	0.9	0.9		1.3	2.1	1.3		1.8	
16 001	support		107						1.8		1.5	0.3				
4																•
Activiti	1.002 Name: programm es Role	ner - PHP											Code:			
Nr.	Project		Fixed		Duration	Start ~	Finish	Role	Quantity	Utilizat	Effort	Notes	4	•	OK	
1.1.4	software dev	elopment proc	Duration	1	36	03.12.15 16:00	10.12.15 11:00	11.002 programmer							Cance	
1.1.5	f software dev	elopment proc	Duration	1	15	10.12.15 11:00	14.12.15 10:00) 11.002 programmer								
1.2.3	software dev	elopment proc	Duration	1	21	14.12.15 10:00	16.12.15 16:00	11.002 programmer.								
1.2.2	software dev	elopment proc	Duration	1	10	14.12.15 10:00	15.12.15 12:00	11.002 programmer								
⊻ 1.2.1	software dev	elopment proc	Duration	1	40	14.12.15 10:00	21.12.15 10:00) 11.002 programmer	. 1	100	40			-		
	assigned activities	armana proc	- instance			18 17 15 1810										
	assigned activities															
RESOURC	E POOL: http://localhost/ri	s/21	FILTER	SET STRU	JCTURE: Role						E	WEEI	K1:2			

To calculate the Full Time Equivalent, set the annual working time per employee in the programm environment.

File > Options > General > Annual working time per employee

Options		×
General	General	
Display Extended	Rillsoft-Design: White +	
Extended		
Quick Access Toolbar	Default location	
Garce Access rooman	Projects: C:\ProgramData\Rillsoft Project 7.1\Projects	
	Portfolios: C:\ProgramData\Rillsoft Project 7.1\Portfolios	
	Templates: C:\ProgramData\Rillsoft Project 7.1\Templates	
	Reports: C:\ProgramData\Rillsoft Project 7.1\Reports	
	Default parameters for new activity	
	Fix: Duration -	Disregard team and employee calendar
	Duration: 8 h	Start of activity only at first shift
	Extended	
	Show help	Auto restore: 5 🗘 m
	Cutoff day move to current date	Currency:
	☑ Label resource chart	Undo depth: 100 ‡
	Represent weekend	Activity are critical, 0 h if buffer less than or equal:
	Represent nonworking days	☑ Read-only projects in the portfolio of grey
	Calculation of reserve time	Different project resources substitute
	 Nepresent working time 	Annual working time per employee: 1500 h/year
	Integration Server	
	Enter commit comment for project versions	Use a proxy server for your LAN
	Timeout: 600 s	Adresse:
	HTTP authentication	Port number: 8080
	User name:	User name:
	Password:	Password:
		OK Abbrechen

6.14 Project-specific role

You can structure role usage by clicking the menu item **Start > Outline > Structure** using the following criteria:

- Role -> Project
- Project -> Role

€ Strue	ture Outlir	ow detail de detail ♥ subproject ne	• t •															
RB 🗀 .	، ا ا	ROLE USAGE							2016 portfolio								-	□ ×
FILE Gantt chart	START PROJECT Variance analysis Network diagram Gantt-network chart Activity views	FORMAT	le Ali Employ am Ali Machin Capacity vi	vee .il ne X Ews A	Resource cl Cost chart Gantt chart Additional vi	nart • 1 I ew	Save Manage Show ▼ User views	e Proj	ject Resource Properties	0× 2	5× 50× 75× 100×	tan Act tan Sul tan Lin Ir	ivity * oproject * k * asert	Structur	+∃ • • re È • line	▼ ▲ ▼ ▼ €dit	Cutoff d Current Project s Scrolling	ate date tart • g
	Cuto ff d	ate: 10.02.16 00:00		<<					February 20	16		1			Ма	arch 2016		
11-	Marris			F # - +	04		05		06	07	80	_	09	10		11	12	
Nr.	Name	2	status	Effort	150		222		222	410	165		348	249		276	317	
+2	Project1	lanmont proc		109	48		104		1/	220			220			45.4	457	
E 3	new_software deve	elopment proc		1257	102		78		98	229			228	114		154	157	
± 11.00	01 programmer - C++			254			1/		28	58	18		41	16		38	33	
⊞ 11.00	02 programmer - PHP	'		76				_		53	23							
	03 programmer - V.Ba	sic		142				_	12	50	3		26	28		19	4	
⊡ 13.00	01 manager			98	18	aaffuuar	a dawalan	mont of	anning		5		40	1			29	
3.1.1	software developm	ent planning		18		sonwar	e developi	ment p	anning									
3.3.1	analysis of user inp	put		19									inalysis o	i user inp	ul			
3.3.2	operational concep	ot		27										operati	onal con	icept		
3.11	software product ev	valuation		34														SC SC
⊞ 14.00	01 designer			242	42		22	_	15	37	8		40	16		17	40	
	01 analyst			370	42		39		43	31	20		81	29		40	40	
Activiti	13.001 Name: manag es Role	ger														Code:		
Nr.	Name		Project			Duration	Start		Finish	Role	e	Quantity	Utilizat	Effort	Notes			ЭК
☑3.1.1	software de	velopment planning	new soft	ware deve	lopment	18	3 27.01.10	6 08:00	29.01.16 10:00	13.0	001 manager	1	100	18			0	ancel
⊠3.3.1	I analysis of u	user input	new_sof	ware deve	lopment	19	26.02.10	5 11:00	01.03.16 15:00	13.0	D01 manager	1	100	19				
⊠3.3.2	2 operational	concept	new_soft	ware deve	opment	27	7 01.03.16	6 15:00	07.03.16 09:00	13.0	001 manager	1	100	27				
⊠3.11	software pro	oduct evaluation	new_sof	ware deve	elopment	34	22.03.16	5 11:00	28.03.16 14:00	13.0	001 manager	1	100	34				
✓ Only a	assigned activities																	
PESOLIPC	E POOL http://localboo	N/	CTDU/CTUD	E Project	> Dolo													

Applications for the Project-specific Role usage view:

- Display of the project's demand for resources in the form of roles for a project.
- Resource allocation from the perspective of roles.
- Project-specific calculation of the usage of every single role.
- Project-specific calculation of the total efforts and total costs of every single role.
- Visualisation of the roles assignation in activities.

You can use the Project-specific Role usage view for the following:

- Assign selected activities to a role.
- Analyse the role usage for a project by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.

Context menu in the Role usage view

₫	Show maximum usage per unit of time
₫	Show average usage per unit of time
6 .	Show effort per unit of time

- Show maximum usage per unit of the time the maximum required number of personnel resources for each of the roles / qualifications per day, week, etc.
- Show average usage per unit of the time the average required number of personnel resources for each of the roles / qualifications per day, week, etc.
- Show effort per unit of the time planned effort in employee hours (or employee days, respectively) per day, week, etc.

6.15 Team

You can structure team usage by clicking the menu item **Start > Outline > Structure** using the following criteria:

- Team -> Project
- Project -> Team



R 🗀	うぐ 🗆 🕫	TEAM USAGE						2016	portfolio								- [l ×
FILE	START PROJECT	FORMAT																^
Columns	Save	Role Teams Employee	Cus Not Other 1	tom fields es & links ooltips 🔻		 Proj ✓ Proj ✓ Cuto 	ect start ect end off date	 ✓ Current date ✓ Milestone in ☐ Reserve time 	☐ Critical calendar ☑ Labels	path	Total Activ Empl	l utilization ity loyee	Period	🗌 Ad	tivitys in a row oup by team			
	Data	1	Tooltips		Resource unit	s			Show						Group			
							▼ ♦									•		• *
	Cutoff date: 10.02.10	5 00:00	<<			_	H	ebruary 2016					March	2016				
No.	News		F (4)	04	0	5	06	07	08		09	10		11	12	1	3	
Nr.	Name		Effort	16	12	0	116	142	41		110	107		103	140	6	3	
212	took 2		189	16	10	4 1 prog	ramme	21 r - C++			10	5						
2.1.2	task 4		40				task 4											
5112	system test planning		31'				system	test planning										
5.1.1.4	software transition pla	anning	17'				sof	tware transitior	planning									
5.1.2.3	software developmen	t library	21'					S	oftware developmen	nt libra	агу							
5.1.3.3	system requirements		15'									system	requirem	ents				
± 12.001	South		157					29	11		10	40		40	27			
⊞ 13.001	East		196				33	46	15		21	5		22	33	2	1	
⊡ 14.001	West		416		10	6	50	46	15		69	57		41	80	43	2	
5.1.1.1	software developmen	t planning	16'			software	e develo	pment planning										
5.1.1.3	software installation p	lanning	34'					software	installation plannin	ıg								-
4																		F
1	1.001 Name: North - T	eam A													Code:			
Activitie	Term Term	mamham																
Activity	is reall reall	members															01	
														Reso	urce pool		0	<u>`</u>
Nr.	Name				Code C	alendar	1	lon-working days	Working group - team	Ro	le - qualific	ation	Pro	Costs	Notes		Can	cel
13.01	Tidy						1	9.07.10-23.07.1	11.001 North - Team	A 11	.001 progra	ammer	100	0.00				
13.02	Tidy						1	9.07.10-23.07.1	11.001 North - Team	A 11	.003 progra	ammer	100	0.00				
17.01	Eager								11.001 North - Team	A 15	.001 analys	st	100	0.00				
17.02	Eager								11.001 North - Team	A 11	.001 progra	ammer	100	0.00				
prequipe													— (
RESOURC	POOL: http://localhost/r	156/21	51	RUCTURE: I	eam									11 li 1 🕯 🔪	VEEK1:3 -			

Application of the Team usage view:

- Display of the project's demand for resources in the form of teams.
- Resource allocation from the perspective of teams.
- Calculation of the usage for every single team.
- Calculation of the total efforts and total costs of every single team.
- Visualisation of the teams assignation to activities.

You can use the Team usage view for the following:

- Assign selected activities to a team.
- Analyse the team usage by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.
- View additional resource chart or break-even chart.



Context menu in the Team usage view



- Show maximum usage per unit of the time the maximum required number of personnel resources for each of the work groups / teams per day, week, etc.
- Show average usage per unit of the time the average required number of team resources / teams per day, week, etc.

• Show effort per unit of the time – planned effort in employee hours (or employee days, respectively) per day, week, etc.

6.16 Project-specific team

You can structure team usage by clicking the menu item Start > Outline > Structure using the following criteria:

- Team -> Project
- Project -> Team



R 🗀 🗔 '	५ े 🗆 🕯	TEAM USAGE							2016 portf	olio							- 0	×
FILE	TART PROJECT	FORMAT																^
Gantt chart	/ariance analysis Network diagram Santt-network chart	Employee Cther	e #1	Employee Machine	<mark>.1h</mark> Res ☆ Cos G an	ource chart • t chart • tt chart	*== : 1== :	Save Manage Show *	Project Resour	rce	0× 25× 50×	× 75× 100×	tan Activity ~ 1- Subproject ~ 같은 Link ~	Structure	▼ ▲	Y Cu Cu Y Pr	utoff date urrent date oject start 🝷	
Act	ivity views	Resource views	Capa	acity views	Addit	ional view	Use	r views	Properties		Scheo	dule	Insert	Outline	Edit	S	crolling	_
	Cutoff date: 10.02	16.00:00						• Eabo	0046					March 2016		•		. ^
	Galoff date. 10.02			0/	-	05		06	07		08	09	10	11	12		13	-
Nr.	Name		Effort	16		120		116	142		41	110	107	103	140		63	
⊟2	Project1		105	16		80		9										
	North - Team A		105	16		80		9										
⊡5	2016_2_soft		853			40		107	142		41	110	107	103	140		63	
⊞ 11.001	North - Team A		84			24		24	21			10	5					
	South		157						29		11	10	40	40	27			
⊟ 13.001	East						33	46		15	21	5	22	33		21		
5.1.1.3	software installatio	n planning	nning 34'						software ins	stalla	tion plannir	ng						
5.1.2.1	software engineeri	ng environment	nning 34' wironment 40'								software e	ngineering	environment					
5.1.2.2	software test enviro	onment	16'	Software test environment														
5.1.2.5	non-deliverable so	ftware	15'								I	non-de	iliverable software	P				-
5.1.3.3	system requirement	nts	15'										system req	unements	fication toot	ing		
5.1.8	qualification testing)	21'											qua	softwa		figuration m	
5.1.10	software configuration	tion managem	21												301111	IIC COI	software n	
5.1.11	Software product e	valuation	34 [°]			16		50	46		16	60	E7	41	20		42	
± 14.001	west		410			10		50	40	_	15	69	57	41	00		42	
			10.00 -															-
			8.00 -															
	6.00 -								6			Ę						1
4.00 -							4					, i i		4	•			
- Overlo	- Overload 2 00 -					2				3						3		-
— Usage	•		2.00 -															
4																	Þ	
Properties																		
RESOURCE P	OOL: http://localhost.	/ris6/21	STR	UCTURE: Pr	oiect > Ie	am		_							1:3			
Nr. Name Effort 16 100 <t< td=""></t<>																		

Application of the Project-specific team usage view:

- Display of the project's demand for resources in the form of teams for a project.
- Resource allocation from the perspective of teams.
- Project-specific calculation of the usage for every single team.
- Project-specific calculation of the total efforts and total costs of every single team.
- Project-specific visualisation of the teams assignation to activities for a project.

You can use the Project-specific team usage view for the following:

• Assign selected activities to a team.

- Analyse the team usage for a project by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.

Context menu in the Project-specific team usage view

☐ Show maximum usage per unit of time

- Show effort per unit of time
 - Show maximum usage per unit of the time the maximum required number of personnel resources for each of the work groups / teams per day, week, etc.
 - Show average usage per unit of the time the average required number of team resources / teams per day, week, etc.
 - Show effort per unit of the time planned effort in employee hours (or employee days, respectively) per day, week, etc.

6.17 Employee workload

You can structure employee workload by clicking the menu item **Start > Outline > Structure** using the following criteria:





Applications for the Employee workload view:

- Display of the project's demand for resources in the form of employees in the project.
- Resource allocation from the perspective of employees.
- Calculation of the workload of every single employee.
- Calculation of the total efforts and total costs of every single employee.
- Visualisation of the employees assignation to activities.

You can use the Employee workload view for the following:

- Assign selected activities to an employee.
- Analyse the employee workload by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.
- Check the calendar of employees.

Context menu in the Employee workload view

- Show maximum usage per unit of time
- 击 Show average usage per unit of time
- Show effort per unit of time
- Show percent usage per unit of time
 - Show maximun workload per unit of the time The maximum required number of personnel resources per day, week, etc.

- Show average workload per unit of the time The average required number of personnel resources per day, week, etc.
- Show effort per unit of the time Planned effort in employee hours (or employee days, respectively) per day, week, etc.
- Show percent workload per unit of the time Shows the weekly total workload of employees in percent instead in employee hours / employee days.

6.18 Employee workload with an additional Gantt chart

As with other resource views you can add as an additional view the Gantt Chart by clicking the menu item **Start > Additional view > Gantt chart**.

.II. R	esource	chart	•													
<u>~</u> C	ost chart	•														
🗐 G	antt chai	rt														
Ad	ditional	view														
R 🧀 🔒	ণ্ট 🗇 🗄		EMPLOYEE US	SAGE				2016 p	ortfolio						- 🗆	×
Gantt chart	START PROJ Variance analysi: Network diagrar Gantt-network c	s m thart	FORMAT nployee	eam	e .ii. Re X Co Ga	source chart • st chart • ntt chart	tave I danage	Project Resou	0× 25× 50	× 75× 100×	tan Activity → this Subproject → the Link →	Structure	▼ ▲ ▼ - ▼ ₩ ◆	▼ Cuto ∭ Curr ▼ Proj	off date rent date ject start *	^
A	clivity views		Resource view	vs capacity vie	Aug			riopentes	Suie	uule	Insert	Outime	Luit	Sur	Jiiiig	
	Cutoff d	ate: 10.02.	16 00:00	<<		1	F	ebruary 2016				March 2016		-		
					04	05	06	07	08	09	10	11	12		13	-
Nr.	Name			Effort	16	120	116	181	52	120	135	122	160		63	
÷ ?	Team not defin	ed		127				39	11	10	28	19	20			
□ 11.001	North - Team A			189	16	104	33	21		10	5					
⊞ 13.02	Tidy			65	16	40	9									
⊡ 17.02	Eager			124		64	24	21		10	5					
2.1.2	task 2			40		1	programme	r-C++								
5.1.1.2	system test pla	anning		31			system	test planning	nlanning							
5.1.1.4	software transi	tion plan	ning	17			SOI	tware transition	pianning ftware developm	aant libraru						
5.1.2.3	software develo	opment li	brary	21				Annuk Su	itware developii	ient norary	- evetom r	oquiromonte				
5.1.3.3	system require	ements		15						10	a system i	equiremento				
± 12.001	South			106			20	29	11	10	40	40	21		24	
E 14.02	Diligent			40			35	20	11	21	3	~~~~~			21	
. 14.02	Dingent			40												-
Nr. I	Name	Dur S	itart	Finish			H	Software	installation plan	ning						
5	software tran	2.13 0	8.02.16 16:0	0 10.02.16 17:			sof	tware transition	planning							
f	following and	1.25 1	5.02.16 09:0	0 16.02.16 11:		L		tollowii	ig and updating (plans						
⊡ 5.1 €	establishing	10 1	6.02.16 11:0	0 01.03.16 11:				P		esta	blishing a softwa	re development ei	nvironment			
s	software eng	5 1	6.02.16 11:0	0 23.02.16 11:0					software	e engineeri	ng environment					
s	software test	2 1	6.02.16 11:0	0 18.02.16 11:0					tware test envir	onment						
5	software dev	2.63 1	6.02.16 11:0	0 18.02.16 17:				SO SO	ftware developn	nent library						
s	software dev	4.5 2	2.02.16 08:0	0 26.02.16 12:						oftware dev	elopment files					
r	non-delivera	1.88 2	6.02.16 13:0	0 01.03.16 11:0						I h non-	deliverable softw	аге				-
4															1	•
Properties																
RESOURCE	POOL: http://loca	alhost/ris6	/21	STRUCTURE	: Team > Em	ployee							K1:3 - <u>-</u>			۰.a

It helps not only to control resource utilization but also to keep the time project progress constantly in mind.

All activities usual for resource views are available here now.

6.19 Project-specific employee workload

You can structure employee workload by clicking the menu item **Start > Outline > Structure** using the following criteria:

±=	+∃ Show detail ▼	
	Thide detail 🔻	5
Structu	In subproject 🔻	A
✓ E	mployee	
P	ersonal > Project	
_ T	eam > Employee	
_ T	eam > Project > Employe	ee
T(eam > Role > Employee	
R	ole > Employee	
R	ole > Project > Employe	e
R	ole > Team > Employee	
	roject > Employee	
P	roject > Role > Employe	e
P	roject > Team > Employe	ee

R 🗀 日	ء 🗆 ی ک	EMPLOYEE US	AGE					2016 po	ortfolio										- 0	ı ×
FILE	START PROJECT	FORMAT																		^
•	$A \downarrow \frac{1}{2}$	Role	□ Cus ☑ Not	tom fields es & links	🕁 Maximum 🕁	Average	□ Project start ✓ Project end	☑ Curi ☑ Mile	rent date estone in calendar	□ Criti	cal path els	✓ Tota ✓ Activ	l utiliza /ity	ition [Perio	d	Activi Grou	tys in a ro p by empl	w oyee	
Columns	Sort Renumber Exce	el 🗌 Employe	e Other 1	ooltips 🝷	Let Utilization		Cutoff date	Res	erve time			🗌 Emp	loyee							
	Data	1	Fooltips		Resource ur	iits				Show								Group		
						*												•		•
	Cutoff date: 10.02.	16 00:00	<<		1	F	ebruary 2016		1				March	2016						
				04	05	06	07		08	09		10		11		12		13		1
Nr.	Name		Effort	16	120	116	181		52	120	1	35		122		160		63		
⊡2	Project1		105	16	80	9														
± 13.02	Tidy		65	16	40	9														
⊞ 17.02	Eager		40		40															
⊡5	2016_2_soft		980		40	107	181		52	120	1	35		122		160		63		
⊞ 14.02	Diligent		40				29		11											
	Goeslike		75									8		40		27				
⊞ 16.02	Sleeper		180			17	29		11	29		32		1		40		21		
	Eager		84		24	24	21			10		5								
± 18.01	Slow		82				29		11	10		32								
± 19.01	Fast		156			33	17		4	21		5		22		33		21		
±20.02	Think		236		16	33	17		4	40	1	25		40		40		21		
. € 21.02	Consider		127				39		11	10		28		19		20				-
4																_				
a 17	7.02 Name Eager																Code:			
(4)																				
Activities	s Timesheets	Employee (Calendar	Team m	iembers															
Nr	Name		Project		Duration	Start	- Finish		Role	Rala	On-call	Availa	Pr	L Hel	Δ Ε	ffort	Notee		OK	
26113	a matemateration	lansing	2016 2	ft	21	02 02 16 0	0.00 00 02 16	16.00	15 001 sesket	0000	100	/ (v alia	100	100	/	21	THOLOG			
₹5.1.1.2	software tran	nsition planning	2016_2_	soft	17	08.02.16.0	6:00 10.02.16	17:00	15.001 analyst	0	100		100	100		17		-	Cance	al
☑5.1.2.3	3 software dev	velopment library	2016_2	soft	21	16.02.16 1	1:00 18.02.16	17:00	11.001 programm	0	100		100	100		21				
☑5.1.3.3	3 system requi	rements	2016_2_	soft	15	03.03.16 1	5:00 07.03.16	14:00	15.001 analyst	0	100		100	100		15				
✓ Only as	signed activities	✓ Only	activities v	vith matching	role															
RESOURCE	POOL: http://localhost	/ris6/21	ST	RUCTURE: PI	roject > Employee								E	R F	WE	ЕК 1 :	3		L	+ .4

Applications for the Project-specific employee workload view:

- Project-specific display of the project's demand for resources in the form of employees.
- Resource allocation from the perspective of employees.

- Project-specific calculation of the workload of every single employee.
- Project-specific calculation of the total efforts and total costs of every single employee.
- Visualisation of the employees assignation to activities.

You can use the Project-specific employee workload view for the following:

- Assign selected activities to an employee.
- Analyse the employees workload for each of the projects by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.
- Check the calendar of employees.

Context menu in the Project-specific employee workload view

- ☐ Show maximum usage per unit of time
- Show effort per unit of time
- Show percent usage per unit of time
 - Show maximun workload per unit of the time The maximum required number of personnel resources per day, week, etc.
 - Show average workload per unit of the time The average required number of personnel resources per day, week, etc.
 - Show effort per unit of the time Planned effort in employee hours (or employee days, respectively) per day, week, etc.
 - Show percent workload per unit of the time Shows the weekly total workload of employees in percent instead in employee hours / employee days.

6.20 Timesheets tab on the employee view

Here you can display information about the hours worked for a personnel resource.

Prerequisite You or assigned employees can only enter the confirmations in the Rillsoft Integration Server interface.

Activate the tab Timesheets in the activities properties window.

Activities

All activities assigned to the employee are listed here.

Name Name of the assigned activities

Target shows the effort scheduled in the activities for this employee

Actual shows how much of the planned effort the employee has already spent on the activities

Open - shows open effort in the activities for this employee

Notes Notes

Whether the effort is displayed in person-hours or person-days depends on the project settings.

Timesheets



Here you can see for a activitiy selected on the left how the employee has worked through the task on a daily basis.

Calendar week in which calendar week did the employee work for the activities

Day on which day of the week the employee worked for the activities

Data Date

Target shows the effort planned for this employee on the day and for the activities

Actual shows how much of the planned effort the employee has already completed during the day

Shift Time of day



6.21 Human Resource Capacity Leveling

If the scheduling of roles and machine types is completed, the Human Resource Capacity Leveling view helps you to estimate whether there is sufficient personnel capacities to execute the project or where potential bottlenecks may occur.

The **Human Resource Capacity Leveling** is determined by the number of employees, their qualifications, time of employment and workplace (project, subproject). The **Human Resource Capacity Leveling** shows not only the number of the required hours and days for employees and roles, but also indicates excess and shortfall (supply minus demand = contingency). Moreover, the **Human Resource Capacity Leveling** view helps you to detect employees that match the requirements of the demand.

Employees whose employee hours / days are in boldface, have already been assigned to this activity. If they are displayed in both boldface and red colour, you have an assignation conflict, which means that the employee has been assigned to several activities at one time.

You can use the Human Resource Capacity Leveling view to do the following:

- Detect overloaded resources as well as the scale and cause of this event.
- View the working capacity for each of the resource role.
- Calculate the numbers of work hours that have been assigned to the individual employees.
- Determine the time the employee is available for additional assignments.

• Assign recources optimally.

Context menu in the Human Resource Capacity Leveling view



6.22 Relative capacity requirements percent each role

Percentage per professional role

This option calculates the percentage by which a demand for an occupational role may have been met or undermet with the available skilled labour.

The capacity utilisation per role is calculated using the formula:

(Actual capacity used/total capacity) x 100

The existing resource capacity is defined as the basis, i.e. how many person-days are available per role, for example, is taken as 100%.



Percentage of all professional roles

A percentage share of an occupational role is calculated in relation to a common need for all roles.

(Actual capacity used per roll/total capacity of all rolls) x 100



6.23 Human Resource Capacity Leveling with an additional Gantt chart

As with other resource views, you can add as an additional view the Gantt Chart by clicking the menu item **Start > Additional view > Gantt chart**.



R 🗀 F	• 🗇 🗇 🖬	HUMAN RES	OURCE CA		IING				2016 portfolio						×
FILE	START PROJECT FORMAT														^
Gantt chart	Variance analysis Network diagram tt Gantt-network chart		Role Employee		.ll Resource chart ▼ ☆ Cost chart ▼ Gantt chart		* Save I → Manage	Project Resour	0× 25× 50× ce →	75× 100× the Activity the Subp tao Link	ity * roject * *	itructure	▼	Cutoff date Current date Project start •	
	Activity views Resource vie			pacity views	Addition	nal view	User views	Properties	Schedu	ule Inse	ert	Outline	Edit	Scrolling	
	Cutoff date: 10.02.16 00:00				January	January 2016 February 2016 March 2016									
					02	03	()4 0	5 06	07	08	09		10 11	
Nr.	Name		Effort	Shortfall	+243	+405	;	-2 -6 16 9	1 -35 7 70	401 -111 109	-5	-114 72		-12 -40 53 60	
± 11.001	programmer - C+	+	216	-35 (7%)	+72	+120	+	80 +2 32 2	3 +45	-12 82	+82.5	+5.5		+7 +24	
2.1.1	task 1	task 1		-10 (32.70)	+24	+40	-	40 +2 1000 task 1	4 +2/	-45	-5	+14		+5	1
2.1.3	task 3		32				ann	. D	task 3						
3.2.1	software engineering environment		40								softwar	re engineering e	environmen	ıt	
3.2.4	software development files		36								sof	ltware developr	nent files		
5.1.2.1	2.1 software engineering environment		40'								softw	are engineering	g environme	ent	
5.1.2.4	4 software development files		36									software deve	ent file	es	
14.02	Diligent				12	20	3	16 2 [,]	f 17.5	37	38	7		2.5	
21.01	.01 Consider		200	04 (69())	12	20	3	6 2 16 4	17.5	105	27	7		2.5	
∃ 11.003	11.003 programmer - V.Basic 12.001 menocor		320	-27 (6%)	+48	+80	+	32 +3 18 1 ¹	2 +45	-7	+32.5	+32.5		+48 +55	
E 13.001	13.001 manager		120	-30 (24 %)	+27	+45	+	27 +2	9 +45	+45	+40	-24		+27 +45	-
Nr.	Name	Du Start	Fini	ish						Destruction					Ê
⊡2	Project1	15 26.01.16 00):00 16.0	:00 16.02.16 00:00			-			Projecti					
	subproject 1	10 26.01.16 08	3:00 08.0	02.16 17:00				····· taak d		oject 1					
2.1.1 task 1		4 26.01.16 08	4 26.01.16 08:00 29.01.16 17:00					task 1	1.000000000						
2.1.2 task 2 5 01.0		5 01.02.16 08	08:00 05.02.16 17:00						1 programme	er - C++					
2.1.3 task 3 4 03.02.16 0		3:00 08.0	02.16 17:00					task 3							
2.2	task 4	8.13 28.01.16 08	3:00 09.0	02.16 09:00					lask -	4					
2.3	project end	0 11.02.16 09	11.0	02.16 09:00					→ ± ^µ	roject enu					
⊡3	new_softwa	44 27.01.16 00):00 29.0	03.16 14:00											Ŧ
• Description														P	
Properties															_
RESOURCE	E POOL: http://localh	ost/ris6/21	FILTER	R SET STRU	CTURE: Role	e > Employee					Ē	WEEK			

It helps not only to control a capacity alignment but also to keep the time project progress constantly in mind.

All activities usual for resource views are available here now.

6.24 Project-specific Human Resource Capacity Leveling

You can structure employee usage by menu item **Start > Outline > Structure** using the following criteria:


RE 🧀	🖯 🕈 🗟 🔲 र	HUMAN RESOU	IRCE CAPACITY PLAN	NING			2	2016 portfolio					- 🗆 ×
FILE	START PROJECT	1	FORMAT										^
10-50	🔁 Variance analysis	Rol	e Employee	.Il. Re	esource chart 🝷	* Save			-	Activity -	₽ ⊟ *∃ •	T	V Cutoff date
(ITH)	😁 Network diagram	Tea	m 👫 Machine	_∕× Co	ost chart *	I 🔚 Manage		0% 25% 50% 75	5× 100×	🗂 Subproject 👻	- <u>-</u>	🍢 - 📼	Current date
chart	Gantt-network chart	Other	÷	🗐 Ga	antt chart	📩 Show 🔻	Project Resource	事 했 했 형	× •	້ເຊຍ Link 👻	• r	м <	▼ Project start ▼
	Activity views	Resource views	Capacity views	Add	ditional view	User views	Properties	Schedule		Insert	Outline	Edit	Scrolling
								▼ ♦					*۲
	Cutoff date:	10.02.16 00:00	<<	Januar	y 2016			Februa	ary 2016				March 2016
Ne	Name		Effort Shortfall	02	03	04	05	238	43	08	09	10 286	276
INI.	Project1		234 -2 27 (1%)	-243	+405	-9.6	-61 144	-49 26_	-128	3.8 -12.7	-125	-26.1	-40.6
=3	new software develo	opment proc	1080 -380 (35%)	49.6	+82.7	+35.7	+52.2	+14.7	+1.	5 +15.9 9 77 77	+11.3	+4.3	+4.4
	001 programmer - C++		216 -35 (16%)	25.6	+101.2	+22.4	21 17 +2.8	28	-114 58 -16	5 +52.1	-00.5	-20.1	-40.6 38 +17.1
⊞ 11.0	002 programmer - PHP		76 -59 (78%)	+8	+13.3	+2.7		+6.3	53	23	+4.7		+1.7
⊞ 11.0	003 programmer - V.Basi	ic	138 -21 (15%)	+16	+26.7	+10.7		+30.3	50 -19	3 +4.5	26 +7.2	28 +24	19 +1.7
⊞ 13.0	001 manager		64	13.5	+22.5	+13.5	+14.5	+22.5	+22	.5 +20	40 +2.5	+14	+22.5
⊞ 14. (001 designer		197 -99 (50%)	10.8	+18	42 -9.6	22 -6	15	-20	.1 +4.3	40 -29	-16 -14.4	-0.6
⊞ 15.0	001 analyst		325 -118 (36%)	10.8	+18	+12	-15	-32	-14.	.1 +4.9	-51	-5	40
± 16.0	2016 0 coft		64 -48 (75%)	+12	+20	+20	+20	+20	+20) +20 2 88	+20	24	-40
± 5	2016_2_SOIL		953 -120 (13%)	96.7	+161.2	+83.6	-40	-7	-14.	1 +105	-36.5	-6	+59.3
													-
4													Þ
	3 Name: new_s	oftware developmen	t process									Code:	
Gong	Proformed to a m	Shamd machine t	anna Shamdim	nahinany	Format	Color	laarfialda Natos						
Gene			ypes Snared III	acrimery	Format	COIOI C	isel fields - Notes	·					OK
Due	date Date Time	Project cale	endar:		- Project settings			Color:	Autor	natic color 👻			
Start	27.01.16 - 00:00	Categoor	Price	eibe:	Time step:	hour	v	Use for	subordina	ted subprojects			Cancel
	20.02.10.14.00	- Not selec	cted - · ·	100	Duration:	workdays(depe	endent on project c 👻	and acti	vities				
Finis	h: 29.03.16 * 14:00	Status:			Effort:	hours	-	1					
		- Not selec	cted -	Ψ.	Enter delive	able for activity	(Example: 150 M ²)						
Cuto	ffdate: 27.01.16 ▼ 00:00	Baseline:		-	Enter effort	or activity(Exam	ple: 5 man-hours)						
						-, (
RESOUR	CE POOL: http://localhost/	/ris6/21	FILTER SET STRU	ICTURE:	Project > Role >	Employee				l	🖃 🔢 🔜 WEEK	1:3	

You can use the **Project-specific Human Resource Capacity Leveling to do the following:**

- Detect overloaded resources as well as the scale and cause for this event.
- View the working capacity for each of the resource role per project.
- Calculate the numbers of work hours that have been assigned to the individual employees per project.
- Determine the time the employee is available for additional assignments.

Context menu in the Human Resource Capacity Leveling view



- Show maximum usage per unit of the time The maximum required number of personnel resources for each of the roles / qualifications per day, week, etc.
- Show average number per unit of the time average required number of human resources per day, week, etc.
- Show effort per unit of the time Planned effort in employee hours (or employee days, respectively) per day, week, etc.

Resource chart •

6.25 Human Resource Capacity Leveling with additional resource chart

As with other resource views you can add as an additional view the resource chart by clicking the menu item **Start > Additional view > Resource chart**.

- E G	antt chart																																			
Ad	Iditional viev	N																																		
R 🗀 🗖	5 🕫 🗖 🕫	HUMAN	RESOURCE	CAPACITY PLAN	NING										2016	бро	tfolio	D															-		C	<
FILE	START PROJECT		FOR	MAT																																^
E	Variance analysis		📑 Role	Employee	.th R	esour	ce cha	irt 🝷	* <mark>en</mark> Sa	ave				.=		2	52 50	12 75			ta A	ctivit	y -		Ē		*E	• '	T		1	Y Ci	utoff	date		
Gantt	Network diagram	Employee	💽 Team	* Machine	× 0	ost ch	nart -		I 🖬 M	lanag	e F	Proje	⊐ ect R	esourc	e 📑			Ň	- -		1-1 S	ubpr	oject	-	۔ Stru	.= cture	1	•	× •			Cu	urren	it dat	te .	
chart 🛄	Gantt-network chart	Resource	views	Capacity views	- G Ad	antt o ditior	nart nal viev	N	User	views		Pr	roper	ties			Sche	dule			001	Ink	rt			• Outli	ne		JITIO E¢	lit		P Pr	crolli	ing		
	,				1												•	•			Feb	oruary	/ 2016	3										1	- '	
	Cutoff date:	10.02.16 00:	00	~~	6 27	28	29	30 3	1 01	02	03	04	05	06 (07 08	8 0	9 1	0 1	1 12	2 1	3 14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	
Ne	Mama		Effe	et Chardfall	T W	T	F 46	S S	S M 40	T 40	W	T 72	F 80	S	S M	4 6	T V	V T	F	5	s s	M	T 101	W	T 94	F	S	S	M	T 28	W 20	T 24	F 33	S	S	
INI.	programmer - C++		33	25 -20 (6%)	-8	-8	-2		+41	1-6 18	-23 23	-16 16	-16		-1 17	8 -2	2 -6	5 +5 5 12	3 +5	7		+29	-37 2 <u>6</u>	-48 32	-30 24	-16			-19 11	-6 3	+61	+57	+40			
□ 11.002	programmer - PHP		20	08 -70 (34%)	8	8 +8	+0 8 +8		+0	+0	*1 8 +8	*0 8 +8	8		8	+	0 +0 7 +8	5 +1 3 +4	0 +10	0		+0	13	16	24	24			27	19	12	+24	4			
2.1.1	task 1		1	24				task 1																												
2.1.3	task 3		:	32					_							ta	sk 3																			
3.2.1	software engineerin	g environme	ent 4	40																									S	oftw	are	eng	inee	ering	envi	
3.2.4	software developme	nt files	:	36																								-				softv	ware	dev	elop	
5.1.2.1	software engineerin	g environme	ent 4	0'																			1							S	oftv	ware	eng	inee	ring	
5.1.2.4	software developme	nt files		36																												<u>.</u>	.	soft	ware	
14.02	Diligent				8	8	8				8	8	8		8	3.	5 4	2				5	8	8	8	8			8	8	8	8	6			
21.01	Consider				8	8	8				8	8	8		8	3.	5 4	2												5	8	8	6			
	programmer - V.Bas	ic	19	96 -21 (11%)	+8	8	8		+16	+16	8	8	8		8	+	9 +8	3 +1	2 +16	6		+1	-8	-8	19	+8			+13	+11	+4		+4.5	5		
	manager		:	39	+1	*1	+7		+9	+9	+1	+1	+9		+9	+	9 +9	9 +9	9 +9			+9	+9	+9	+9	+9			+9	+9	+9	+9	+4			
	designer		23	28 -74 (32%)	16	16	+6		8	ь -6	-16	-16	16		-8	-	8					+2	-5	-8	-8	16			+5	-3 +8	+4	0	+1			
	analyst		3.	14 -104 (33%)	-8	-8	-2		8	8	-7	16	-16		-9	i -1	5 -8	14	i +8			+3	-12	-16	-3					+5	+8	+8	+3			
∓ 16.001	support			0					. 0				.0			• •	o	• . •				.0			. 0	.0				.0						*
				20.00																																
				16 00																			16													
- Cap	acity independent role	es		10.00							4.4													14	13											
- Cap	acity			12.00								9	10			1	0									9			10							
- Sho	rtage			8.00	6	Å	°		6	6							6			-		h				1				6			5			
- Over	rload			4 00					5	5								4	3					-							3	3				
- Dem	hand			1.00																6						-										-
4																																			•	
Properties																																				
RESOURCE	POOL: http://localhost,	/ris6/21	FI	TER SET STRU	JCTURE	Role	> Em	ployee																ł	2		1	DAY 1	:1	-	-	—	i—		+	

Additional resource chart contrasts the demand (blue and red bars) for each of the roles / qualifications to the capacity (green line).

If you click on the required roles / qualification in the table, the chart shows the required number (per unit) of resources as bars marked blue.

The green line shows the available number (per unit) of employees.

If the green line (supply of employees) is above the blue bar (demand for employees), there is an excess of employees.

However, if the green line runs across a blue bar, a red bar shows a shortfall of employees.

6.26 Material requirement

You can structure material requirement by clicking the menu item **Start > Outline > Structure** using the following criteria:

- Material -> Project
- Project -> Material

비금 + Show	/ detail 🔻																																
La - Hide	detail 🔻																																
Structure																																	
TU SU	oproject *																																
Outline																																	
🗟 🧀 🖯 ち ぐ 🗋 Ŧ	MATERIAL REQUIRE	MENTS								2	2016 p	ortfo	olio																		-		×
FILE START PROJECT	FORMAT																																^
	Role	Custom field	s 🔠 Maxim	um	P	Project s	start	Cur	rrent	date			Criti	cal p	ath		ota	l utili:	zatio	n	Per	iod		A	tivity	s in	a ro	N					
Columns Sort Renumber Excel	□ Teams ☑ T □ Employee Oth	er Tooltips	Effort			roject (Cutoff c	ena Jate		eston serve f	time	lienda	ar 🗠	Labe	15			Emp	inty loyee															
Data	Tooltip		Resource u	e nits								Sh	now												Gro	up							
Cutoff date:	10.02.16.00:00															•	٠			Febr	uary	201	6										۰.
Culon date.	10.02.10 00.00		2	3 2	28	29	30 3	1 01	02	03 (04 0	5 06	6 07	08	09	10	11	12	13	14	15	16	17	1	8 19	2	0 2	21	22 _ :	23 2	24 2	5 2	26
Nr. Name	Unit	Quan N	lotes 7	· v	/ T	F	S S	S M	Т	W	TF	s - S	S	М	Т	W	Т	F	S	S	М	Т	W	1	F	\$	s	S	М	T۱	N .	Г	F
□2 Project1	100	3		_				3																									
± 12.001 Metals - Steel	100	2						2																									
13.001 Non-lemous metals - Alu 2016 2 soft	minium rkg	0						1		1				3							1	4											
= 12 001 Metals - Steel	100	3												2								1											
5.1.1.3 software installation pla	nning 100	2												- 1		inna		aaa			" <u>ę</u> s	soft	ware	e ins	stalla	tion	pla	nnin	ıg				
5.1.2.2 software test environme	nt 100	1												2.			um								sof	wa	re te	est e	nvir	onme	ent		
□ 12.002 Metals - Stainless steel	100	3								1				1							1												
5.1.1.2 system test planning	100	1													sys	tem t	test	plan	ning														
5.1.1.4 software transition plann	ning 100	1															sof	twar	e tra	nsiti	on p	olan	ning										
5.1.1.5 following and updating p	lans 100	1																					follo	win	ig an	d up	odat	ing	plans	3			
13.002 Non-ferrous metals - Co	pper 10 kg	3																				3											
4																																	- -
5.1.1.3 Name: software in	stallation planning				_	_	_	_		_		Code	e:		Fb	(ed:	Dur	ation		-	Effort	: [6	8 F	'n	Dur	ation		4.25	AT	(8 Hrs	:.)	r
General 🗸 Roles 🖌 Employee	Timesheets	✓ Material	✓ Machine t	уре	1	Machine	ery	Link	(5	For	nat	U	lser fie	lds		Notes																	
Filter:		1	·	6	Assig	gned ma	aterial:																Re	sour	ce po	ol				[C	ЭK	
Material group Material type		Costs			Mate	erial gro	up		Mate	rial type	•				U	nit	C	alcul		Amou	nt 1	Vote	s						۱ ר	ιΓ	Ca	ncel	
Metals Steel		0.00			Meta	als			Steel						10)0 ka	F	ix			2												
Metals Stainless steel		0.00																															
Metals Spring steel		0.00		1																													
Non-ferrous metals Aluminium		0.00																											-11				
Non-ferrous metals Copper		0.00		-																													
RESOLIDCE ROOL: http://localbeat/sic	/21	TED CET		inche	Make	arial -															J.				DAY	1.4							
RESOURCE POOL: http://localnost/fisb	FIL FIL	JEKSEL S	TROCTORE: Pro	lett >	Wate	anai																		Ш, Ч	DAY	1:1							1 al 1

Applications for the Material requirement view:

- Display of the project's demand for materials.
- Resource allocation from the perspective of resources.
- Calculation of the total efforts and total costs of every single material.
- Visualisation of the materials allocation to activities.

You can use the Material requirement view for the following:

- Assign selected activities to a material.
- Analyse the material requirements by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.

6.27 Machine types

You can structure machine types by clicking the menu item **Start > Outline > Structure** using the following criteria:

- Machine types -> Project
- Project -> Machine types

⊞ 	Hide	v detail 🔻													
•	Outline	pproject	Ť												
	Outime														
111	620:		ISACE				2016 portfolio								- ×
FILE	START PROJECT	FORMAT	ISAGE				2016 роктоно							-	
	A 1-	Role	Custom fi	ields a Maximum	Project sta	irt 🔽 Current dat	te 🗆 O	ritical nath	Total utilizatio	on 🗆 Pe	eriod 🗆	Activitys in	arow		
	Ź↓ ≟	Teams	Notes & li	inks Effort	✓ Project en	d ⊻ Milestone i	n calendar 🗹 La	abels	Activity			Group by m	achine types		
Columns	Sort Renumber Excel	Employee C	ther Tooltip		Cutoff dat	e 🗌 Reserve tim	ie		Employee						
	• Data	Too	ting	TE Average			Show					Grou	un		
	Dutu	100	(ip)	Resource units	-		51104	•				0100	ар 		
	Cutoff date: 12.02.16 0	00:00	~~		Fe	bruary 2016				Marci	h 2016		•		• -
			0	04 05	06	07	. 08	. 09	. 10		11	12	. 1	3 ,	14
Nr.	Name	E	fort	64	58	11	40	21	36		62				
□ 12.001	Rotate machine		179	40	50	11			16		62				
2.1.2	task 2		40	1	programmer -	- C++									
5.1.1.3	software installation pla	inning	34			software in	stallation plann	ing							
5.1.1.4	software transition plan	ning	17		softv	vare transition p	lanning	_							
5.1.1.5	following and updating	plans	10			following	and updating p	lans							
5.1.6.2	unit testing		31								unit tes	ting			
5.1.7	unit integration and test	ing	26									gration and	I testing		
5.1.8	qualification testing		21								qua	unication te	sung		
□ 13.001	Milling machine		113	24	8 task 3		40	21	20						
2.1.3	Lask 3	iloc	32				sol	ftware dev	elopment files						
5125	non-deliverable softwar	a a	15					non-o	deliverable softw	are					
4	non deliverable soluval		101												•
JHL AT	004 News Detete mar												Cultur		
THF 14		anne											Code.		
Activitie	s Machine types													1	
Nr.	Name		Project		Duration	Start	Finish	Machine ty	/De	Qu	Utilization	Notes		0	ж
3.1.5	software transitio	n planning	new_softv	ware development proces	s 18	05.02.16 08:00	09.02.16 10:00	12.001 Rot	tate machine					(=	ncel
3.1.4	software installat	ion planning	new_softv	ware development proces	s 36	05.02.16 08:00	11.02.16 12:00	12.001 Rot	tate machine						
25.1.1.	4 software transitio	in planning	2016_2_s	oft	17	08.02.16 16:00	10.02.16 17:00	12.001 Rot	tate machine	1	100				
21.6	3 software installat software transition	ion planning in planning	2016_2_s	iott ware development proces	34	08.02.16.16:00	15.02.16 09:00	12.001 Rd	tate machine	1	100				
44	task 4	a paring	Project2	and development proces	16	10.02.16.08.00	11 02 16 17:00	12.001 Rd	tate machine				-		
Only a	ssigned activities														
														I.	
RESOURCE	POOL: http://localhost/rise	5/21	STRUCTI	URE: Machine types						E	2 🗟 🖬	WEEK 1 : 3			

Applications for the Machine Types view:

- Display of the project's demand for machine types.
- Ressource allocation from the perspective of machine types.
- Calculation of the usage for every single machine type.
- Calculation of the total efforts and total costs of every single machine type.
- Visualisation of the machine types allocation in activities.

You can use the Machine types view for the following:

- Assign selected activities to a machine type.
- Analyse the a machine type usage by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.

Context menu in the Machine types view

If you open the context menu in the Machine types row, the following commands appear:

- Show maximum usage per unit of time
- H
 Ghow average usage per unit of time
 Show average per unit of time
 Show average usage per unit of time
 Show average per unit of time
 Show
- Show effort per unit of time
 - Show maximum usage per unit of the time The maximum required number of machine resources for each of the machine types / machine groups per day, week, etc.
 - Show average usage per unit of the time The average required number of machine type resources per day, week, etc.
 - Show effort per unit of the time Planned effort in employee hours (or days, respectively) per day, week, etc.

If you open the context menu in the Activity row, the following commands are available:

- Share the selected activity shares the machine type together with other activities.
- Use exclusively the selected activity uses the machine type exclusively.

6.28 Machinery usage

You can structure Machinery usage by clicking the menu item **Start > Outline > Structure** using the following criteria:

- Machine -> Project
- Project -> Machine



Re 🧀 E	START PROJECT	MACHINERY U	JSAGE					2016 portfolio							-	□ ×
Columns	A 1 2	Role	Cust V Note Other T	tom fields es & links ooltips 🔻	Maximum Keffort Average	 □ Project st ☑ Project en ☑ Cutoff date 	art	date □ e in calendar ☑ ime	Critical path Labels	Total uti Activity Employe	lization 🗌	Period	Act Gro	ivitys in a row oup by machinery		
	Data		Tooltips		Resource units			Sh	ow					Group		
	Cutoff date: 12.02.1	6.00:00		016			•	Eabruary 2016						March 2016		^
	001011 0010. 12.02.1			010	04	05	. 06	07		08	09	1	n	11	12	
Nr.	Name		Effort			64	1 25	10		40	21	2	8	18	12	
□ 12.01	machine 1		93			40	17	10				-		18		
2.1.2	task 2		40				1 programm	er - C++								
5.1.1.4	software transition pla	anning	17				S	o <mark>ftwar</mark> e transiti	on planning							
5.1.1.5	following and updatin	g plans	10					🔳 follo	wing and up	lating plans						
5.1.7	unit integration and te	sting	26											unit integra	ation and te	esting
⊟ 13.01	machine 2		113			24	8			40	21	2)			
2.1.3	task 3		32				task 3	3								
5.1.2.4	software developmen	tfiles	36							softwar	e developm	nent file	5			
5.1.2.5	non-deliverable softw	are	15								non-delive	rable so	ftware			
5.1.5	software requirement	s analysis	30									5	oftware	e requirements a	nalysis	
																-
4																•
8	5.1.7 Name: unit inter	pration and testin	n											Code		
_		, and toothing	9											0000.		
Activiti	es Machine Te	am members														
Nr	Name			Project		Duration	Start 🔻	Finish	Machine type	<u>.</u>	Availa	Util N	lates		1	ок
213	task 3			Project1		32	03 02 16 08:00	08.02.16.17:00	13.01 machin		0	100				
₹5.1.2	4 software deve	lopment files		2016 2 s	oft	36	22.02.16 08:00	26.02.16 12:00	13.01 machin	ne 2	0	100				ancel
☑ 5.1.2	5 non-deliverabl	e software		2016_2_s	oft	15	26.02.16 13:00	01.03.16 11:00	13.01 machir	ne 2	0	100				
⊠5.1.5	software requi	rements analysis		2016_2_s	oft	30	03.03.16 15:00	09.03.16 12:00	13.01 machin	ne 2	0	100				
	regioned activities	2 Only	activities w	with matching	role										1	
	isaignoù douvides	⊡ Only	douvines w	nur maturing	100											
RESOURC	EPOOL: http://localbost/r	is6/21	ST	RUCTURE: N	lachine								w	/FEK 1 + 3		- + -
													- Ш. ģ. ¹¹	Certa i S	-	

Applications for the Machinery Usage view:

- Display of the project's demand for machines in the project.
- Ressource allocation from the perspective of machines.
- Calculation of the usage of every single machine.
- Calculation of the total efforts and total costs of every single machine.
- Visualisation of the machines allocation in activities.

You can use the Machinery Usage view for the following:

- Assign selected activities to a machine.
- Analyse the machine usage by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.

Context menu in the Machinery Usage view

If you open the context menu in the Machine row, the following commands appear:

- Show maximum usage per unit of time
- 击 Show average usage per unit of time
- Show effort per unit of time
 - Show maximum usage per unit of the time the maximum required number of machine resources for each of the machine groups machine types per day, week, etc.
 - Show average usage per unit of the time the average required number of machine resources per day, week, etc.

• Show effort per unit of the time – planned effort in machine hours (or machine days, respectively) per day, week, etc.

If you open the context menu in the Activity row, the following commands are available:

- Share the selected activity shares the machine together with other activities.
- Use exclusively the selected activity uses the machine exclusively.

6.29 Machine capacity planning

You can structure Machinery use by clicking the menu item **Start > Outline > Structure** using the following criteria:

- Machine types -> Machine
- Machine types -> Project -> Machine
- Project -> Machine types -> Machine



R 🗀	500 -	MACHINE CA	PACITY PLA	NNING				2016 po	rtfolio					- 0	I X
FILE	START PROJECT	FO	RMAT												^
Columns	A Z Sort Renumber Excel	Role Teams Employe	□ Cust ☑ Note e Other Te	om fields es & links poltips 🔻	Maximum	 Project start ✓ Project end ✓ Cutoff date 	✓ Curren ✓ Milest	nt date 🛛 🖾 cone in calendar 🗟 ve time	Critical path	 ✓ Total utilization ✓ Activity ✓ Employee 	n 🗹 Period	 Activitys in a r Group by made 	ow :hine types		
	Data		Tooltips		Resource units			S	how			Group			
	Cutoff date:	12.02.16 00:00		<	<		•	February 2016				March 2016		•	
					04	05	06	07	08	09	10	11	12	_	13
Nr.	Name		Effort	Shortfal	+80	-24	-18 -18	+69	+0 +40	+59	+44	-22	+80		+80
□ 12.001	Rotate machine		211	-73 (35%) +40	-24	-18 18-	+29	+40	+40	+24	-22	+40		+40
2.1.2	task 2		40				w task 3								
2.1.3	eoffware installation	Janning	34				nit.	software	installation p	lanning					·····
5114	software transition of	anning	17				S	oftware transition	planning .						
5115	following and updatin	a nians	10					follow	ing and updati	ng plans					
5.1.6.2	unit testing	g plano	31									unit te	sting		
5.1.7	unit integration and te	stina	26									unit int	egration and	d testing	
5.1.8	qualification testing		21									dr	alification t	esting	
12.01	machine 1				40	40	40	40	40	40	40	40	40		40
⊡ 13.001	Milling machine		113		+40	24 +16	+32	+40	40	21 +19	20 +20	+40	+40		+40
2.1.3	task 3		32				i task 3								-
•															•
	2.1.3 Name: task 3							Cod	le: F	ixed: Duration	- Effort:	32 Ph Durati	on: 4 /	AT (8 Hrs.))
Genera	al 🗸 Roles Employ	vee Timesł	neets	Material	 Machine type 	 Machinery 	Links	Format	User fields	Notes					
Assigne	d machine types:	Fit	ter:				- 1	Assigned machine	:			Resource pool		OK	<
Machin	e group - Machi Balanc	e N	lachine n	Avail I	Machine group - Ma	chi Costs		Machine name	Availa	Machine group - N	Machi Utilia	z N		Cano	cel
Rota	te machine	1 m	achine 1	0 F	Rotate machine	85.00		machine 2		0 Milling machine	1	00			
Millin	g machine	0													
Prefer	med and accioned teams														
	roa ana assigned teams														
RESOURC	E POOL: http://localhost/r	is6/21	STE	RUCTURE: N	/lachine types > M	achine					E B	WEEK 1 : 3			+ -

Applications for the Machine capacity planning view:

- Display of the project's demand for machines in the project.
- Calculation of the usage of every single machine.
- Calculation of the total efforts and total costs of every single machine.

• Visualisation of the machines allocation in activities.

You can use the Machine capacity planning view for the following:

- Analyse the machine usage by means of filter settings.
- Change the timescale.
- Quick access to the resource pool.

Context menu in the Machine capacity planning view



- Show maximum usage per unit of the time the maximum required number of machine resources for each of the roles / qualifications per day, week, etc.
- Show effort per unit of the time planned effort in machine hours (or machine days, respectively) per day, week, etc.

6.30 Machine capacity planning with additional resource chart

As with other resource views you can add as an additional view the resource chart by clicking the menu item **Start > Additional view > Resource chart**.



R 🗀 🗔	র্ণ 🗌 न	MACHINE CA	PACITY PLA	NNING					2016 p	ortfolio				-	□ ×
FILE	START PROJECT	FO	RMAT												^
Gantt chart	Variance analysis Network diagram Gantt-network chart	Employee Othe	Role 🕌 ieam 🔮	Employee Machine		art • * I	Save Manage Show *	Project	Resource	0× 25× 50× 75× 100×	Activity *	Structure	▼ ▲ ▼ - ▼ ▲ 《	Cutoff d	ate date tart ▼
A	Activity views	Resource view	ws Ca	pacity views	Additional vie	w Use	erviews	Prop	perties	Schedule	Insert	Outline	Edit	Scrollin	3
	Cutoff date:	12.02.16 00:00		<<				Febr	ruary 2016			Marc	h 2016		<u>◆</u>
					04	05		06	07	08	09	10	11	12	13
Nr.	Name		Effort	Shortfall	+80	88 -24		66 -18	11 +69	40 +40	21 +59	36 +44	62 -22	+80	+80
⊡ 12.001	Rotate machine		211	-73 (35%)	+40	64 -24		-18	11 +29	+40	+40	16 +24	62 -22	+40	+40
2.1.2	task 2		40				1 program	nmer - ((++						
2.1.3	task 3	at a set a s	32				las	ok J	softwa	re installation planning					
5.1.1.3	software installation	planning	34					softwa	are transiti	on planning	9				
5.1.1.4	following and undati		10						follov	ving and updating pla	ns				
5162	unit testing	ng plans	31										unit testind		
517	unit integration and t	estina	26										unit integra	tion and testi	ng
5.1.8	qualification testing	ooung	21										qualifi	cation testing	
12.01	machine 1				40	40		40	40	40	40	40	40	40	40
	Milling machine		113		+40	24 +16		+32	+40	40	21 +19	20 +20	+40	+40	+40
															-
 Capa Capa Shot Over Demt Properties 	acity independent rol acity tage tload aand	25		10.00 - 9.00 - 8.00 - 7.00 - 5.00 - 4.00 - 3.00 - 2.00 - 1.00 -		3	4		1	1	11 11 11	2 2			
RESOURCE	POOL: http://localhost,	/ris6/21	ST	RUCTURE: Ma	ichine types > Ma	chine						🖃 📑 🖬 wi	EK 1 : 3 🔹 —	 	- + .#

Additional resource chart contrasts the demand (blue and red bars) for each of the machine groups / machine types to the capacity (green line).

If you click on the required machine group / machine type in the table, the chart shows the required number (per unit) of resources as bars marked blue.

These show the sum of the machine capacity requirements (per unit, for example, a day, a week, a month, etc.). The bars are displayed in blue, while the resource requirements do not exceed the available supply.

The green line shows the available number (per unit) of machines. If the green line (supply of machines) is above the blue bar (demand for machines), there is an excess of machines.

However, if the green line runs across a blue bar, a red bar shows a shortfall of machines.

6.31 Customise format views

All views have a **Format** tab where numerous functions for view customisation are grouped together. Depending on the format view, the available options may vary.

R 🧀 (¢ ⊟	> ৫ 🗆	••	GANTT CHART		Bu	ilding planning		-		×
FILE	STA	RT PRO.	JECT	FORMAT							^
Columns	A Z↓ Sort	1 2 3 Renumber	X Excel	Role Employee User fields	 ✓ Notes & links Warnings ▼ Other Tooltips ▼ 	 □ Project start ✓ Project end ✓ Cutoff date 	 ✓ Current date ✓ Milestone in calendar ✓ Milestone in subproject 	 Non-working days key Reserve time 	 □ Critical path ✓ Labels 	⊻ Li	nks
	0	ata		То	oltips			Show			

Data

Block **Data** provides the following functionality:

• Columns Adjust the column order in the task table

- Sort Sort the sequence of tasks in the project according to various criteria such as start time, name, etc.
- Renumber Renumber the tasks and sub-projects after editing the plan.
- Excel Export the view to MS Excel, if necessary with several levels and columns displayed in the table.

Tooltips

pear as tooltips and/or warnings when you move the cursor over an operation bar.

The following tooltips are possible:

- Roles
- Employees
- User defined fields
- Notes & Links
- Other tooltips

R 🧀	ゆ 🖯 > ぐ	• *	G	ANTT CHART	
FILE	START P	ROJECT		FORMAT	
Column	A 1 Z 3 s Sort Renumb	per Exc	el	Role Employee User fields	 ✓ Notes & links ✓ Project st Warnings * ✓ Project en Other Tooltips * ✓ Cutoff data
	Data			То	Teams
	(Cutoff da	ate: 08.0	5.23 08:00	Material Machine types
Nr.	Name	Effort	Dura	Start	Machine
⊡ 1	Phase 1	512	39	08.05.23 08	Start-finish date
1.1	Cost estimate	16	1	08.05.23 08	Start finish when moving
1.2	Project proce	80	10	10.05.23 08	Duratian
1.3	Completing t	128	8	17.05.23 08	Duration
1.4	Create task li	136	17	26.05.23 08	Effort
1.5	Order	152	19	05.06.23 08	Completed

You can switch on the following warnings:

R 🧀	ゆ 🖯 🔈 ぐ	·*	G	ANTT CHART			
FILE	START P	ROJECT		FORMAT			
Column	A Z Z Sort Renuml	ber Exc	el [Role Employee User fields	⊡ I War	Notes & links nings 🔹 Late activities	Project star Project end
	Data			То	~	Overallocate	d resources
		Cutoff da	ate: 08.0	5.23 08:00	~	Failed resour	rces resources
Nr.	Name	Effort	Dura	Start	~	Partially assid	aned resources
1	Phase 1	512	39	08.05.23 08	~	Cross-project	t links
11	Cost estimate	16	1	08 05 23 08		cross-projec	

Progress line only for Variance analysis Time.

- Start dates a progress line is mapped in relation to the start dates of activities
- End dates a progress line is mapped in relation to the end dates of activities

Difference for Variance analysis of Effort and Costs

• Value the values from the baseline plan and the values from the current interim plan are shown

R 🖬	Ø 🖯 🤈 🗘 🗖	*	VARIA	NCE AN	IALYSIS EFFORT					Building p	planning				- 🗆	×
FILE	START PROJ	ECT		FOR	MAT	4-	•									^
Column	A Z Z Sort Renumber	Ro Er U:	ole nployee ser fields To	✓ No Warni Other	ntes & links ings * Tooltips *	³ Value ³ Difference Difference	St	art date nish date rress line		Project start Project end Cutoff date	 ✓ Current date ✓ Milestone in c ✓ Milestone in s 	alendar Nor ubproject Res Show	estone in resour n-working days erve time	ce line Critica key Labels Only o	l path completed	
		Cutof	f date: 08	3.05.23 0	00:80		<<	v				•		*		
Nr	Name	Effort	Effor	Dura	Start	Finish		-		May 2023				June 2023		
⊡ 1	Phase 1	512 544	+32	39	08.05.23 08:	00 29.06.23	17:00	40		20 64	64 88	40 48	80	80	48	
1.1	Cost estimate	16		1	08.05.23 08:	00 08.05.23	17:00	16								
1.2	Project procedure	80 112	*** 2	10 14	10.05.23 08:	00 23.05.23 29.05.23	17:00 17:00	24		40	16 40	8		Value from	n the	
1.3	Completing the c	128	N.	8	17.05.23.08	00 26.05.23	17:00			24	40		2222	💊 basic plar	1	
1.4	Create task lists	136	Ľ,	17	26.05.23 08:	19.06.23	17:00			/		40	40	40	8	
1.5	Order	152		19	05.06.23 08:	00 29.06.23	17:00						40	40	40	
2	Audit constructio	-0		Ň	- 29.05.23 08:	- 29.05.23	08:00			í						
3	Invoicing for pha	0		0	20.06.23 17:	00 29.06.23	17:00									
± 4	Phase 2	528 576	+48	28	10.05.28.08:	:00 16.06.23	17:00	48		64 80	128 64	112 128	96 168	80 88		
5	Invoicing for pha	0		0	16.06.23 17:	00 16 06 23	17:00									
⊟ 6	Phase 3	392		29 28	12.06.23 08: 13.06.23 08:	:00 20.07.23	17:00	-	-		🗕 🌶 Value	from the cu	rrent	80 64	80	
6.1	Project reporting	120		15	12.06.23 08: 13.06.23 08:	00 30.06.23 00 03.07.23	17:00 17:00				interir	n plan		40 32	40	
6.2	Invoice verification	80		10	12.06.23 08: 13.06.23 08:	00 23.06.23 00 26.06.23	17:00 17:00							40 32	40	-

• Difference the values from the basic plan and a difference to the basic plan values are calculated

R 🗀	¢ 🖯 🔈 ¢ 🗖		VARIA	NCE AN	ALYSIS EFFORT				Building pla	inning				- 🗆	×
FILE	START PROJ	ECT		FOR	MAT										~
Column	$ \begin{array}{c} A \\ Z \\ s \end{array} \right) \begin{array}{c} 1 \\ 2 \\ 3 \\ 3 \\ \end{array} $ s Sort Renumber	C Ro	ile iployee er fields	✓ No Warni Other	tes & links ngs * Tooltips *	Value St Difference Fin	art date nish date		Project start Project end Cutoff date ✓	Current date Milestone in cal Milestone in su	Iendar Noi bproject Res	estone in resour n-working days k erve time	ce line Critical cey Labels Only co	path ompleted	
	Data		То	oltips	D	ifference Prog	ress line				Show				
		Cutoff	f date: 08	.05.23 0	8:00	<<	▼				•		¢		^
Nr.	Name	Effort	Effor	Dura	Start	Finish	19		2023	. 21	. 22	. 23	June 2023	25	
⊡ 1	Phase 1	512 544	+32	39	08.05.23 08:00	29.06.23 17:00	40		64	64 +24	40 +8	80	80	48	
1.1	Cost estimate	16		1	08.05.23 08:00	08.05.23 17:00	16								
1.2	Project procedure	80 112	+32	10 14	10.05.23 08:00	23.05.23 17:00 29.05.23 17:00	24		44	16 +24	- +8				
1.3	Completing the c	128		8	17.05.23 08:00	26.05.23 17:00	1		24	40					
1.4	Create task lists	136		17	26.05.23 08:00	19.06.23 17:00	Ń			8	10	40	40	8	
1.5	Order	152		19	05.06.23 08:00	29.06.23 17:00						40	40	40	
2	Audit constructio	- 0		- 0	- 29.05.23 08:00	- 29.05.23 08:00	Value	e fro	m the		Differenc	e to the ba	ic plan		
3	Invoicing for pha	0		0	29.06.23 17:00	29.06.23 17:00	Dasio	; pla	n		Differenc				
± 4	Phase 2	528 576	+48	28	10.05.23 08:00	16.06.23 17:00	48		64 +16	128 -64	112 +16	96 +72	80 +8		
5	Invoicing for pha	0		0	16.06.23 17:00	16.06.23 17:00									
⊟ 6	Phase 3	392		29 28	12.06.23 08:00 13.06.23 08:00	20.07.23 17:00							80 -16	80	
6.1	Project reporting	120		15	12.06.23 08:00 13.06.23 08:00	30.06.23 17:00 03.07.23 17:00							40 -8	40	
6.2	Invoice verification	80		10	12.06.23 08:00 13.06.23 08:00	23.06.23 17:00 26.06.23 17:00							40 -8	40	-
4								_							P

Resource units

For the **Employees Utilisation** view, you can have the resource utilisation per time unit displayed in different variants:

- Maximum maximum number of human resources required per day, week, etc.
- Average average number of human resources required per day, week, etc.
- Effort planned effort in person-hours or person-days per day, week, etc.
- Utilisation (Percentage) enables the total utilisation of human resources by day or week to be displayed as a percentage instead of person-hours/days.

R 🗀	\$ 🖬 👂 ¢	··	EMPLOYEE USAGE		Building	planning				-		×
FILE	START P	ROJECT	FORMAT									^
Column	2↓ Sort + s Renumber s Excel	Role Employ User field	✓ Notes & links wee Warnings * elds Other Tooltips *	T Maximum H Average	Project start Current date Project end Milestone in calendar Cutoff date Milestone in subproject	 ✓ Milestone in resource line ✓ Non-working days key □ Reserve time 	☐ Critical path ✓ Labels	 ✓ Total utilization ✓ Activity chart △ Activity value 	Employee Period Shift calendar	☐ Activities ☑ Group by	in a row employ	ee
	Data		Tooltips	Resource units		Show				Grou	qt	

If you display the resource units at the **Role Utilisation View** in **FTE** full-time equivalent, the FTE Full Time Equivalent (FTE) option shows you the standard performance capability of a resource in a specific time period (e.g. 1 year) in a company.

I	R 🗀 ¢	د 🖬 🗘	¢ 🗆 "	ROLE USAGE				Building planning	I				-		×
	FILE	START	PROJECT	FORMAT											^
	Columns	A Z↓ Sort Re	number Excel	Role Employee User fields	✓ Notes & links Warnings * Other Tooltips *	ⓓ Maximum ⓓ FTE ▲ Effort ⓓ Average	 Project start Project end Cutoff date 	 ✓ Current date ✓ Milestone in calendar ✓ Milestone in subproject 	 ✓ Milestone in resource line ✓ Non-working days key □ Reserve time 	☐ Critical path ✓ Labels	 ✓ Total utilization ✓ Activity chart △ Activity value 	Employee	Activiti Group	es in a r by role	wc
		Data		То	oltips	Resource units			Show				Gre	oup	

In the view **Capacity Employee** you can calculate a resource requirement either in resource units such as personhours/days or in percentages according to professional roles:

- Effort a required resource demand is compared with an available offer related to the project settings, e.g. personhours or person-days.
- **Percentage per role** shows to what percentage a demand for an occupational role is covered or undercovered with existing personnel resources.

• **Percentage of all roles** calculates the percentage of an occupational role in relation to a demand for all qualifications.

R 🗀	\$ 🖬 🕽 \$ 🗇 🗆 "	HUMAN RESOURCE CAPACITY PLA	NNING	Building planning	- 🗆 ×
FILE	START PROJECT	FORMAT			^
Column	A Z Sort Renumber Excel	Role ✓ Notes & links Employee Warnings * User fields Other Tooltips *	Effort % Percent each role % Percent of all roles	□ Project start ☑ Current date ☑ Milestone in resource line □ Critical path ☑ Total utilization ☑ Employee ☑ Project end ☑ Milestone in calendar ☑ Non-working days key ☑ Labels ☑ Activity chart ☑ Period ☑ Cutoff date ☑ Milestone in subproject □ Reserve time □ Activity value	 Activities in a row Group by role
	Data	Tooltips	Resource units	Show	Group

Show

This block contains the options that allow you to refine the graphical representation of the project.

For all views except the network diagram and Gantt network chart

- Project start shows a project start as an additional vertical line in the Gantt chart.
- Project end shows a project end as an additional vertical line in the Gantt chart
- Cutoff date shows a cutoff date as an additional vertical line in the Gantt chart
- Current date shows a period in the Gantt chart with a background colour where the current date is located
- Milestone in calendar Milestones are shown/hidden at the top of the calendar bar.
- Milestone in subproject/project Milestones are shown/hidden on a collapsed subproject bar.
- Non-working days key Designations for non-working days, e.g. U for holiday, are shown/hidden in the Gantt chart.
- Reserve time shows earliest and latest possible operation items
- Critical path shows in red colour operations that belong to the critical path.
- Labels the labels are shown/hidden in the Gantt chart
- Links show/hide the links between operations

For all Resource views

- Milestone in resource line Milestones are shown/hidden on a resource line, provided that the resources are assigned to the milestones.
- Total utilization shows the summed resource utilisation per view in the title area of the chart
- · Activity chart the activities bars are displayed in resource views
- Activity value the effort values for the activities are displayed in resource views
- Employee the human resources can be seen in a capacity view
- Period shows the free time periods within which you can move the activities.

😰 🧀 (\$日 \$ \$	*	HUN	MAN RES	OURCE C	APACITY PLA	NNING		_			Buil	ding plan	ining						- 🗆	×
FILE	START P	ROJECT			FORM	AT										-					^
Columns	2↓ Sort + Renumber	Role Employ User field	yee \ elds (✓ Notes Warnings Other Too	& links s * oltips *	∎ Effort % Perce ∞ _Σ Perce	nt each role nt of all roles	 □ Project ✓ Project ✓ Cutoff 	start 🗟 end 🗟 date 🗟	 ☐ Current date ☐ Milestone in ca ☐ Milestone in su 	ilendar ibproject	✓ Milest ✓ Non-v □ Recen	tone in re working o ve time	source line lays key	□ Critin ✓ Labe	tal path 16	 Total utilization Activity chart Activity value 	on 🗹 Employe 11 Period	e Activities	in a row role	
	Data		100	ltips	/	Resou	irce units				>		Sh Sh	low	i —			1	Group)	
		Cutoff da	ate: 08	.05.23	:00		<<		May 2	2023			1			June 2(23		↓ 20	123	Ji	luly 2
				/				19		20	21	2	22	23	¥.	24	25	26	27	28	_
Nr.	Name		1	Effort	Bal	Overload	Shortfall	+357	-	-16 / +293 -	256 48 / +189	-16 /	92 +253	+269		240 80 / +205	-40 / +317	+293	32 +413	+429	
	programme	r - C++	/	40				+116		+108	+60	+	84	+80		+80	+116	40 -160	+120	+116	
⊞ 11.003	programme	r - V.Basic		40				+120		+120	+120	+1	20	+120		+120	+120	+80	+120	+120	
	writter	1.		304			-40 (13%)	+8		+4	24 +8	4	10	40		-40	40	40	+20	+16	
4.3	Building pla	nning prese	en	64'	16								Buik	ling plannin	g prese	ntation		1	1		
4.7	Complete in	e request li	ist	80'	0								/			Con	plete the requ	iest list	1		
6.1	Project repo	rting		120	-120													Pro	oject reporting		
6.5	Briefing at st	art of const	tr	40'	0							1							¥		
15.02	Goeslike							8		4	32	4	10	40		40	40	40	20	24	
€ 13.001	manager			464			-80 (17%)	56 +25		96 -16 / -11	128 -48 / -43	9 -16	96 /-11	16 +29		+45	+45	40 +13	32 +49	+65	
. 14.001	designer			160				8 +40		+28	32 +4	+	20	40 +40		40 +40	+36	+20	+40	8 +40	
€ 15.001	analyst			200				+36		24 +40	48	4	40	40		40	8 +40	+20	+40	+36	
€ 16.001	support			288			-80 (28%)	24 +12		32 +4	+8			40		80 -40	80 -40	32	+24	+36	
4																					Þ
Activit	2.001 Name: es Role	writter																Code:]	
Nr.	Name				Subp	roject Fixed	Duration	Start	*	Finish	Role		Quantity	Utilizati		Eff	ort Notes			ОК	:
⊻ 4.3	Building plann	ing presentat	tion		Phas	e 2 Dura	ion 64	24.05.23	08:00	02.06.23 17:00	12.001 v	writter	1	100			48			Cance	;el
₩4.7	Complete the Project report	request list			Phas	e2 Dura e3 Dura	ion 80	05.06.23	08:00	16.06.23 17:00 30.06 23 17:00	12.001	writter	1	100		1	80 20				
6.5	Briefing at sta	t of construct	tion		Phas	e 3 Dura	ion 40	14.07.23	08:00	20.07.23 17:00	12.001	writter	1	100			40				
																				Help	p
I Only	assigned activities	3																			
CLIENT: E	N 2016 🗳		S	TRUCTUR	RE: Role :	> Employee											8 🖪 🖬	WEEK 1 : 2		- + 100 9	%::

For Employee view

• Shift calendar The shift calendars assigned to the employees are displayed with background colour.

For Variance analysis Time view

• **Only difference** only those activities and sub-projects are displayed that have a difference to the selected base plan.

R 🧀	🖗 🖯 🌶 🕈 🗖	" VARIA	NCE ANALYSIS TIME			Building planning			-		×
FILE	START PROJ	ECT	FORMAT								*
Column	$ \begin{array}{c} A \\ Z \\ z \\ s \\ s$	Role Employee User fields	✓ Notes & links Warnings ▼ Other Tooltips ▼	 Start date Finish date 	 Project start Project end Cutoff date 	 ✓ Current date ✓ Milestone in calendar ✓ Milestone in subproject 	 Milestone in resource line Non-working days key Reserve time 	Critical path Critical path Labels	Links Only	differe	nce
	Data	То	oltips	Progress line			Show				

For Variance analysis of Effort and Costs view

• **Only completed** only the effort or cost values are compared for the activities where the work done, e.g. the completed percentage or completed effort is higher than zero. If an activity is 100% complete, the current effort or cost is compared with the planned values for the whole activity.

However, if a task is only partially completed, e.g. 50%, then the current 50% effort is compared to the planned 50% effort of the task.

R 🧀 🤇	28	¢ 🗆	" VAR	IANCE ANALYSIS EFFO	RT		Building planning		- 1		×
FILE	START	PROJ	ECT	FORMAT							^
Columns	A Z↓ Sort	1 2 3 Renumber	Role Employee User field	 ✓ Notes & links Warnings ▼ ¹⁵ Other Tooltips ▼ 	³ / ₅ Value ³ / ₂ Difference	☐ Start date ☐ Finish date	 □ Project start	 Milestone in resource line Non-working days key Reserve time 	ritical p abels nly con	ath I <mark>plete</mark>	d
	Data			Tooltips	Difference	Progress line		Show			

Group

The option **Activities in one row** can make the graphical representation look compact. In doing so, it might be useful to switch off the **Labels** from the **Show** block.

The option **Group by employees** is useful when a staff member may have several professional roles or belong to different work groups and you want to map all his activities together.

6.32 User views

You can save the actual view with the saved unit of time, the filter and combinations with additional charts as a user view, e.g. employee and gantt chart.

It allows you to create and edit your own views.

In order to create an user view, do as follows:

- set up a view with required settings such as time scale, filters, additional chart, etc.
- click **Start > User views > Add**.



• add a name for your view.

R User view	
Name:	my view
	OK Cancel

• click OK.

In order to display the view, click **Start > User views > Show**.



Manage the user views

You can change the names order of the saved views by clicking the menu item Start > User views > Manage.

6.33 Additional resource chart

You can add resource chart as an additional view by clicking the menu item **Start > Additional View > Resource chart**.



Application of the additional resource chart:

- Visualisation of the resource usage of a project.
- Analyse the resource usage by means of filter settings.

Selection by resource types

You can filter out additional resource chart using the following criteria:



You can open an additional resource chart in the following views:

- Activity view
 - Gantt chart
 - Gantt-network chart
- Resource view
 - Role
 - Team
 - Employee
 - Machine types
 - Machine
 - Machine requirements
- Capacity view
 - Employee
 - Machine

6.34 Additional cost chart

You can add cost chart as an additional view by clicking the menu item Start > Additional View > Cost chart.



R 🗀 🗔	، آ ب	GANTT CHART				2016 portfoli	0					- 🗆	×
FILE	START PROJECT	FORMAT											~
Gantt chart	Variance analysis Network diagram Gantt-network chart	Employee Other	le Employee	Cost chart	t ▼	Project Resource	0× 2	25× 50× 75× 100×	ta Activity ▼ ta Subproject ▼ ta Link ▼	Structure	▼ ▲ ≅ - ▼ ₩ ◆	Cutoff date Current date Project start •	
A	ctivity views	Resource views	Capacity views	Additional view	User views	Properties		Schedule	Insert	Outline	Edit	Scrolling	
	Cut	off date: 12.02.16 0	0:00	<<		•	•7	•		•			-
							Febr	uary 2016			Ma	ch 2016	_
Nr.	Name	Effort Dur	Start	Finish	04	05	06	07	08	09	10	11	1:
⊡ 3.1	project planning	279 13.38	27.01.16 08:00	15.02.16 11:00	-		1	project plann	ing and oversight				
3.1.	1 software develop	54 2.25	27.01.16 08:00	29.01.16 10:00	softwar	e development pla	anning						
3.1.	2 system test plan	76 4.75	27.01.16 08:00	02.02.16 15:00	4000 B	system test plan	ning						
3.1.	3	0 0	03.02.16 16:00	03.02.16 16:00		h¢1	1						
3.1.	4 software installati	90 5.63	03.02.16 16:00	11.02.16 12:00		→ B→B B B B	softv	vare installation	planning				
3.1.	6 software transitio	44 2.88	05.02.16 08:00	09.02.16 16:00		\$ 1	oftware	transition plann	ing				
3.1.	8 following and up	15 1.88	11.02.16 13:00	15.02.16 11:00			¥1 1	following and	l updating plans				
⊟ 3.2	establishing a so	. 288 9	15.02.16 11:00	26.02.16 11:00					establis	shing a software o	levelopment	environment	
3.2.	1 software enginee	160 5	15.02.16 11:00	22.02.16 11:00					h software engine	ering environmer	It		
3.2.	2 software test envi	20 1.25	15.02.16 11:00	16.02.16 14:00				software t	est environment				
3.2.	3 software develop	42 2.63	15.02.16 11:00	17.02.16 17:00				softwar	e development libr	ary			
3.2.	4	0 0	19.02.16 08:00	19.02.16 08:00				↓					
3.2.	5 software develop	36 4.5	18.02.16 08:00	24.02.16 12:00					software de	evelopment files			
3.2.	6 non-deliverable s	30 1.88	24.02.16 13:00	26.02.16 11:00					non-del	iverable software			
∃ 3.3	system require	141 5.75	26.02.16 11:00	07.03.16 09:00						y sys	tem requirer	nents analysis	
3.3.	1 analysis of user i	57 2.38	26.02.16 11:00	01.03.16 15:00						analysis of user	input		
3.3.	2 operational conc	54 3.38	01.03.16 15:00	07.03.16 09:00						hope	rational con	cept	
3.3.	3 system requirem	30 1.88	01.03.16 15:00	03.03.16 14:00						system requ	uirements		
3.4	system design	84 5.25	01.03.16 15:00	08.03.16 17:00					+	S S S S S S S S S S S S S S S S S S S	ystem desig	n	-
- Actu Targe Finar	al cost t cost icing			300 000.00 € - 250 000.00 € - 200 000.00 € - 150 000.00 € - 100 000.00 € - 50 000.00 € -	86 337.41€	113 540.31 € 112 541 38 € 82 000 00 € 55 000.00 €	133 82 00	869.13 € 139 10.00 €	000.00€	182 436.24 €	184 0 <u>00 00</u>	€23	35
Properties													
RESOURCE	POOL: http://localhost,	/ris6/21								🖃 🔢 🔛 WEEK	1:3	·	+

Application of the additional cost chart:

- Visualisation of the target and actual costs.
- Analysis of the target and actual costs.

Selection by type of financing

You can filter out additional cost chart using the following criteria:



You can open an additional cost chart in the following views:

- Activity view
 - Gantt chart
 - Variance analysis
 - Gantt-network chart
- Resource view
 - Role
 - Team
 - Employee
 - Machine types

- Machine
- Material requirements

6.35 Additional gantt chart

You can add gantt chart as an additional view by clicking the menu item **Start > Additional View > Gantt chart**.

. II. R	esource cha	rt 🔻																
<u> </u>	ost chart 🝷																	
= 0	antt chart																	
Ad	lditional viev	v																
R 🗀 🗖	१ ् ि न	EMPLOY	EE USAGE						2016 portfo	lio							- 🗆	×
FILE	START PROJECT	FOR	MAT															^
100 E	Variance analysis		Ca Role	Employee	. Reso	urce chart 🔻	* Save			0% 25% 50%	75% 100%	ta A	ctivity 👻	₩ ₿ *∃ •	▼ ^	T Cut	off date	
Gantt	Network diagram	Employee	💽 Team	* Machine	🕂 Cost	chart 🔻	I 🔚 Manag	e Pro	iect Resource	- 254 - 504	75A 100A	1-1 SI	ubproject *	Structure	× • •	Curr	rent date	
chart 🔛	Gantt-network chart	,,	Other 🔻		😴 Gant	t chart	E Show T	· · · ·	,	ə 70 400		්න Li	nk *	•	M <	Y Proj	ect start 🔻	-
A	ctivity views	Resource	e views	Capacity views	Additi	onal view	User views		Properties	Sched	ule		Insert	Outline	Edit	Scro	olling	
	Cutoff dat	e: 12.02.16.0	0:00			•		Febru	apy 2016				•	March 2016			•	_^
					· -	05	. 0	6	. 07	. 08		09	. 10	. 11	. 12		13	
Nr.	Name			Effo	rt ;	120	1	6	181	52		120	135	122	160		63	
⊡2	Project1			1(15	80	9											
⊞ 13.02	Tidy				5	40	9											
⊞ 17.02	Eager			4	10	40												
⊡5	2016_2_soft			98	0	40	10	17	181	52		120	135	122	160	·	63	
± 14.02	Diligent			-	10				29	11			8	40	27			
□ 16.02	Sleeper			18	0		1	7	29	11		29	32	+0	40		21	
5.1.1.4	4 software transition p	anning			7			softwar	re transition p	lanning								
5.1.2.1	1 software engineering	environme	ent	4	10				3.1.1.1	softwar	re engine	ering ei	nvironment					
5.1.3.1	1 analysis of user inpu	t			9							anal	ysis of user	input				
5.1.4	system design			4	2								9	system design				
5.1.9	system qualification	testing			28											system o	Juaimcati	ion 🔻
Nr.	Name	D Sta	rt	Finish					project p	lanning and o	versight							
	5.1.1.1 software dev	2 03.	02.16 08:00	0 04.02.16 17	00	S S	oftware dev	elopme	ent planning									
	5.1.1.2 system test p.	. 3 03.	02.16 08:00	0 08.02.16 16:	00		syst	em test	planning	stallation play	ning							
	5.1.1.3 Software Inst. 5.1.1.4 software tran	2 08	02.16 16:00	0 15.02.16.09	00			softwar	re transition p	lanning	ming							
	5.1.1.5 following and.	. 1 15.	02.16 09:00	0 16.02.16 11:	00	L			following	and updating	plans							
⊟ 5.1	.2 establishing .	. 10 16.	02.16 11:00	01.03.16 11:	00				-		e:	stablish	iing a softw	are development	environmer	ıt		
	5.1.2.1 software eng	. 5 16.	02.16 11:00	23.02.16 11:	00				Ø.A.A.A.	softwar	re engine	ering er	nvironment					
	5.1.2.2 software test .	. 2 16.	02.16 11:00	0 18.02.16 11:	00				Soft	ware test énvi	nonment ment libra	arv						
	5.1.2.4 software dev	4.5 22	02.16 11.00	0 26.02.10 17	00						oftware	levelop	ment files					-
•																		Þ
Properties																		
RESOURCE	POOL: http://localhost/	ris6/21		STRUCTURE: Pro	ject > Emj	ployee							E	🗄 🔢 🔛 WEE	(1:3	—I-		+

Application of the additional gantt chart:

• Visualisation of a project's progress.

You can open an additional gantt chart in the following views:

- Resource view
 - Role
 - Team
 - Employee
 - Machine types
 - Machine
 - Material requirements

- Capacity view
 - Employee
 - Machine

6.36 Filter

You can use the filter to define the information you want to display.

Determine filters

• Click on the menu **Start > Edit > Filter**



- Mark the according check box.
- Select the required resource from the drop down menu.
- Click on the button **OK**.

nning 08:00 to: 24.07.23 + 12:00 c choose from offer me alyst igner nager grammer - C++ grammer - V.Basic port ter th - Team A .th .st isider (11.003 programmer - V.Basic) ger (15.001 analyst)	Code	 Costs 70.00 60.00 60.00 50.00 50.00 30.00 30.00 30.00 240.00 100.00 40.00
nning 08:00 to: 24.07.23 + 12:00 b choose from offer me alyst signer nager grammer - C++ grammer - V.Basic uport ter th - Team A .th est hsider (11.003 programmer - V.Basic) ger (15.001 analyst)	Code	
08:00 to: 24.07.23 • 12:00	Code	Costs 70.00 60.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
b choose from offer me alyst signer hager grammer - C++ grammer - V.Basic uport ter th - Team A .tth est hsider (11.003 programmer - V.Basic) ger (15.001 analyst)	Code	Costs 70.00 60.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
e choose from offer me alyst igner hager grammer - C++ grammer - V.Basic port ter th - Team A .th .st isider (11.003 programmer - V.Basic) ger (15.001 analyst)	Code	Costs 70.00 60.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
e choose from offer me alyst signer hager grammer - C++ grammer - V.Basic uport ter th - Team A .th est hsider (11.003 programmer - V.Basic) ger (15.001 analyst)	Code	Costs 70.00 60.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
alyst alyst alyst alyst alyst alyst alyst alyst alger grammer - C++ grammer - V.Basic aport ter th - Team A ath est also alyst alger alge	Code	Costs 70.00 60.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
me alyst igner hager grammer - C++ grammer - V.Basic port ter th - Team A uth ist ist ister (11.003 programmer - V.Basic) ger (15.001 analyst)	Code	Costs 70.00 60.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
me alyst signer nager grammer - C++ grammer - V.Basic uport ter th - Team A .tth est sider (11.003 programmer - V.Basic) ger (15.001 analyst)	Code	Costs 70.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
alyst igner hager grammer - C++ grammer - V.Basic oport ter th - Team A uth ist ist ist ist ist ist ist ist		70.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
alyst igner nager grammer - C++ grammer - V.Basic oport ter th - Team A uth est ister ister ister (11.003 programmer - V.Basic) ger (15.001 analyst)		70.00 60.00 50.00 50.00 30.00 30.00 120.00 240.00 100.00
iigner hager grammer - C++ grammer - V.Basic uport ter th - Team A uth est hsider (11.003 programmer - V.Basic) ger (15.001 analyst)		60.00 60.00 50.00 30.00 30.00 120.00 240.00 100.00 40.00
nager grammer - C++ grammer - V.Basic port ter th - Team A uth est isider (11.003 programmer - V.Basic) ger (15.001 analyst)		60.00 50.00 30.00 30.00 120.00 240.00 100.00 40.00
grammer - C++ grammer - V.Basic port ter th - Team A uth st ist ist ist ist ist ist ist		50.00 50.00 30.00 120.00 240.00 100.00 40.00
grammer - V.Basic port ter th - Team A uth st ist ist ist (11.003 programmer - V.Basic) ger (15.001 analyst)		50.00 30.00 120.00 240.00 100.00
port ter th - Team A uth est nsider (11.003 programmer - V.Basic) ger (15.001 analyst)		30.00 30.00 120.00 240.00 100.00 40.00
ter th - Team A uth est hsider (11.003 programmer - V.Basic) ger (15.001 analyst)		30.00 120.00 240.00 100.00 40.00
th - Team A uth st nsider (11.003 programmer - V.Basic) ger (15.001 analyst)		120.00 240.00 100.00 40.00
th - Team A uth est nsider (11.003 programmer - V.Basic) ger (15.001 analyst)		120.00 240.00 100.00 40.00
uth est nsider (11.003 programmer - V.Basic) ger (15.001 analyst)		240.00 100.00 40.00
nsider (11.003 programmer - V.Basic) ger (15.001 analyst)		100.00
nsider (11.003 programmer - V.Basic) ger (15.001 analyst)		40.00
nsider (11.003 programmer - V.Basic) ger (15.001 analyst)		40.00
ger (15.001 analyst)		
		50.00
eslike (12.001 writter)		40.00
eper (14.001 designer)		50.00
berman (13.001 manager)		50.00
nk (15.001 analyst)		40.00
y, John (11.001 programmer - C++)		40.00
tals - Spring steel		170.00
tals - Stainless steel		267.00
tals - Steel		156.00
n-ferrous metals - Aluminium		20.00
n-ferrous metals - Copper		150.00
ing machine		90.00
ate machine		85.00
chine 1		85.00
chine 2		90.00
	ling machine tate machine chine 1 chine 2	ling machine tate machine chine 1 chine 2

The following filters are available:

Free text

A free-text filter applies to all views except the network/bar network plan and is suitable for filtering out according to the following criteria:

- Activity/subproject names
- code
- User defined fields
- Notes

In addition, search criteria can be combined, such as Activity Name and Notes.

Structure filter or Project / subproject filter

Displays information about activities and resources for the selected subprojects only. You can set the Structure filter in all views.

Time filter

Displays information about activities and resources for specific periods of time only.

Alternative You can set the time filter with the **mouse** by clicking the left button and selecting a start date and a finish date.

R 🖬 🧀	🖗 🖯 🕽 🔇		GA	ANTT CHAR	π								
FILE	START	PROJECT	F	FORMAT									
Gantt chart	Gantt-netw	agram ork chart Cut	() () Variano off date	Time Effort Cost ce analysis	Employee Source view	ole Line Employee am Line Machine ther T ws Capacity views	Resource chart ▼ ☆ Cost chart ▼ 등 Gantt chart Additional view	* Save I Hanage Show ▼ User views	Project Resource Info Properties	0x 25x 50x 75x 100x	Activity - Subproject - Eink - Insert	Structure	+∃ Show detail + -∃ Hide detail + → In subproject + Outline 2023
		Out	on date	00.00.2	10 00.00		May 202	3			June 2023		
Nr.	Name	E	Effort [Dura S	tart	Finish	19 2	20	21	22 23	24	25	26
⊟ 1	Phase 1		512	39 0	8.05.23 08:00	29.06.23 17:00						-	Phase 1
1.1	Cost estimation	ate	16	1 0	8.05.23 08:00	08.05.23 17:00	Cost estimate						
1.2	Project pro	ce	80	10 1	0.05.23 08:00	23.05.23 17:00	+	P	roject proced	ure	`		
1.3	Completing	; th	128	8 1	7.05.23 08:00	26.05.23 17:00			Completi	ng the construction s	chedule		
1.4	Create tas	k li	136	17 2	6.05.23 08:00	19.06.23 17:00						Create tas	sk lists
1.5	Order		152	19 0	5.06.23 08:00	29.06.23 17:00							Order
± 4	Phase 2		472	28 1	0.05.23 08:00	16.06.23 17:00					Phase	2	
⊞ 6	Phase 3		392	29 1	2.06.23 08:00	20.07.23 17:00					Ì		
*													

You can set a report period filter in gantt chart, variance analysis and all resource views.

Hide completed activities

The filter hides already completed tasks and helps to exclude irrelevant information from project presentation.

It is suitable in the activities views such as the Gantt chart, resource views.

Note In **capacity views** allows this filter to take out the resources of completed activities and provide other tasks as free capacities.

Show only overloaded resources

The filter helps to detect overloaded resources. You can use it in the Employee workload and Machinery.

Offer only planned resources for selection

If this check box is not marked, all resources in the resource pool will be available for selection. The activation of this filter makes only those resources available for selection that have been already used in this subproject / project.

This filter can be set in the views Role usage, Team utisage, Employee workload, Human resource capacity planning, Material, Machine types, Machinery and Machine capacity planning.

Note In capacity views this filter refers to roles. I.e. switched on option displays only roles, which are already planned in the project/portfolio. If the option is switched off, all the roles from the resource poolare listed in the capacity view. Accordingly, the employee list below is changed.

Role filter

If resources are assigned to activities in the form of roles or employees, they can be included in the role filter.

You can set the role filter in the activities views such as the Gantt chart and Role usage.

Team filter

If resources are assigned to activities in the form of teams, they can be included in the team filter.

You can set the team filter in the activities views such as the Gantt chart and Team usage.

Employee filter

If resources are assigned to activities in the form of employees, they can be included in the employee filter.

You can set the employee filter in the activities views such as the Gantt chart, resource and capacity views and Employee workload.

Material filter

If resources are allocated to activities in the form of materials, they can be included in the material filter.

You can set the material filter in the activities views such as the Gantt chart and Material requirements.

Machine type filter

If resources are allocated to activities in the form of machine types, they can be included in the machine type filter.

You can set the machine type filter in the activities views such as the Gantt chart and Machine types.

Machinery filter

If resources are allocated to activities in the form of machines, they can be included in the machinery filter.

You can set the machinery filter in the activities views such as the Gantt chart and Machinery.

Project Categories

When project categories are assigned to projects, they can be included in the project category filter and be used in the portfolio.

You can set the project category filter on a Gantt chart, resource and capacity views.

Project Status

When project statuses are assigned to projects, they can be included in the project status filter and used in the portfolio. project status filter and be used in the portfolio.

You can set the project status filter on a Gantt chart, resource and capacity views.

Project Clients

When project clients are assigned to projects, they can be included in the project client filter and be used in the portfolio.

You can set the project client filter on a Gantt chart, resource and capacity views.

6.37 Search

With the help of the menu item **Start > Edit > Search** you can search the projects and portfolios for tasks/sub-projects with specific information.



The Search dialogue box opens.

Rearch Activ	vity/Subproject		×
Search for:	Build		
Nr. 👻	Name	Start	Finish
1.1	Building planning	07.09.16 08:00	04.11.16 16:00
1.1.3.3	Building planning presen	30.09.16 08:00	10.10.16 17:00
1.2.3.3	Building planning presen	17.11.16 08:00	28.11.16 17:00
1.3.3.3	Building planning presen	14.12.16 08:00	21.12.16 17:00
	OK	Cancel	Help

Here you can set the search criteria for the following fields:

- Task/sub-project name
- Code
- User defined fields
- Notes

In addition, the search criteria can be combined, e.g. task name and note.

CHAPTER

SEVEN

PROJECT PORTFOLIO

7.1 Project portfolio

A product portfolio includes several projects and allows:

- Cross-project capacity planning
- · Optimal resource utilization between several projects
- Simulations

You can take all the current projects of the company in a portfolio together and / or add projects in several portfolios.

R 🗀 🗔 <	، ت ی د	GANTT CHA	RT				2016 p	ortfolio						- (□ ×
FILE ST	TART PROJECT	FORMAT													^
Gantt chart	ariance analysis letwork diagram antt-network chart	Employee Ot	Role Lemploy Team Machin	ee A Cost chart	chart • • t	* Save I Hanage Show →	Project Res	ource	0× 25× 5	0* 75* 100*	문 Activity · 가 Subproject · 같은 Link ·	Structure	▼ .	Cutoff date Current da	e ste .rt ▼
Acti	vity views	Resource v	iews Capacity vie	ews Additional v	/iew	User views	Properti	es	Sche	dule	Insert	Outline	Edit	Scrolling	
	Cut	off date: 13.02.1	6 00:00	<<	<u> </u>		November 2	015				December	2015	•	↓
Nr.	Name	Effort Du	r Start	Finish	4	5	46	47		48	49	50 51	 I ,	52	53
⊡1	software de	1255 42	.5 02.11.15 08:00	30.12.15 12:00	-									_	sof
⊡1.1	project plan	279 12.	25 02.11.15 08:00	18.11.15 10:00	-			proj	ject plannir	ng and over	sight				
1.1.1	software dev	54 2.	25 02.11.15 08:00	04.11.15 10:00	 1 ⁶	software deve	lopment plai	nning							
1.1.2	system test p	76 4.	75 02.11.15 08:00	06.11.15 15:00		system te	st planning								
1.1.3	software inst	90 5.	63 06.11.15 15:00	16.11.15 11:00		┝┝━━━━┥┫║║	∎∎ Ь ^s	oftwar	e installati	on planning					
1.1.5	software tran	44 2.	88 09.11.15 16:00	12.11.15 15:00		La mana	software	transit	tion plannin	g					
1.1.7	following and	15 1.	88 16.11.15 11:00	18.11.15 10:00	L			∎_ follo	owing and i	updating pla	ans				
⊟1.2	establishing	288	9 18.11.15 10:00	01.12.15 10:00							establishing a s	oftware developn	nent enviro	nment	
1.2.1	software eng	160	5 18.11.15 10:00	25.11.15 10:00				4		software e	engineering enviro	nment			
1.2.2	software test	20 1.	25 18.11.15 10:00	19.11.15 12:00				≯I հ	oftware te	st environm	ient				
1.2.3	software dev	42 2.	63 18.11.15 10:00	20.11.15 16:00				→ ∎ ∎	software	developme	ent library				
1.2.4	software dev	36 4	.5 20.11.15 16:00	27.11.15 11:00				H		softwa	are development f	iles			
1.2.5	non-delivera	30 1.	88 27.11.15 11:00	01.12.15 10:00							hon-deliverable	software			
⊡1.3	system requ	141 5.	75 01.12.15 10:00	08.12.15 17:00							P 1	system requireme	ents analys	IS	
1.3.1	analysis of u	57 2.	38 01.12.15 10:00	03.12.15 14:00				L			analysis of	user input			
1.3.2	operational c	54 3.	38 03.12.15 14:00	08.12.15 17:00							+	operational conce	pt		
1.3.3	system requi	30 1.	88 03.12.15 14:00	07.12.15 12:00							→ I F ^{Sy}	stem requirement	S		
1.4	system design	84 5.	25 03.12.15 14:00	10.12.15 16:00							+	system desig	n		
1.5	software req	60 3.	75 03.12.15 14:00	09.12.15 11:00								Software require	ements and	liysis	and a
⊡1.6	software im	0	5 10.12.15 16:00	17.12.15 16:00									software	implementation	
1.6.1	software imp	0	5 10.12.15 16:00	17.12.15 16:00								•	sonware	Implementation	
4															•
Properties															
RESOURCE PO	OOL: http://localhost	/ris6/21										🔁 🔛 🔛 WEE	K1:3		- + .#

Requirement: Only the projects that share a common resource pool, may be included in the project portfolio.

All views from the Gantt chart to the resource chart are available for the project portfolio. In the project portfolio you can run all the activities similar to a conventional project, that is, you can create activities, allocate resources, correct processes or save outputs.

Note A new project can not be created in the portfolio. You should create a new project separately and then add a portfolio.

7.2 New project portfolio

In order to open a new project portfolio, do as follows:

- Select the menu item File > Open new project portfolio.
- The dialogue window Portfolio Project selection appears.
- Click on the button Add Folder.
- Select the folder which contains the required projects.
- Click on the button **OK**.

Note the dialogue window **Portfolio Project selection**. It provides the projects that can be selected for the project portfolio.

R Portfolio Project Sele	ection								-7	:
Select: <u>All None</u> Name Building planning Prepare project Project plan Building planning Project works resource poo	To resource pool Project resources Automatically Pro with pool	Code ject is tched	Customer automa to the r		Priority 199- 100 100 100	Status Project convetto the	Start ••• 07.09.16 08:00 19.03.24 08:00 17.04.24 08:00 16.05.24 08:00 ••• t is to be rted manu resource	Finish 05.11.16 16: 16.04.24 17: 20.05.24 08: 11.06.24 16: Jally pool	Filman Filman Galacia	ne e isource pool r e r oomer ui gory ity Is
Rillsoft Project To include proj <u>https://m-doc</u> Don't display again.	ects with project re	sources in p alize.html	ortfolio, open	these projec	tts separa	tely and sw	vitch from the proje	ect resource to	File r	a pool by means of the menu
Add Folder	Add Proj	ect		1			(ОК	Cancel	Help

Note: Only projects that share a common resource pool can be included in the project portfolio.

If projects are not marked and have a red background in the **To resource pool** column, this indicates a difference between project resources and the resource pool.

Include projects with project resources in the portfolio

Deviating projects being coloured grey can be added to the portfolio as follows:

Automatically Automatic re

Automatic replacement of project resources

The option **Replace deviating project resources by resource pool** updates the project resources by adding the resource pool at every opening of the portfolio.

The view Variance analysis displays the changes in time of the projects graphically.



Project resources Manual switching of project resource to resource pool

In order to have the portfolio projects with significant differences in resources, they must be opened separately
and you can switch from the project resource to the resource pool by means of the menu item Project > Switch
> Resource pool.

Edit portfolio

You can use the following three buttons to do the following:



Select all – all projects from the list, that share a common resource pool, are included in the project portfolio. **Select none** - all projects from the list are taken out from the project portfolio. **Add a folder** - search a new folder for projects **Add a file** - add single projects to the list

Select the projects you want to add in the project portfolio. If you want to enter other projects in the list, click on the appropriate button to add either a folder or file.

The projects shown in the list can be **sorted** according to the following parameters:

- Project name
- Code
- Category
- Priority
- Status
- Start of project
- Finish of project
- File names

The selected order is then accepted by the project portfolio.

All views from the Gantt chart to break-even chart are available for the project portfolio. In the project portfolio you can run all the activities similar to a conventional project, that is, you can create activities, allocate resources, correct processes or store outputs.

7.3 New Project Portfolio in Rillsoft with Interface to the Rillsoft Integration Server

To create a project portfolio, please proceed as follows:

- 1. Select the menu item **File > New > New project portfolio**.
- 2. Right after the **Rillsoft Integration Server Portfolio** dialog, the **Rillsoft Integration Server Portfolio Properties** dialog window appears.

lame: Portfolio 2024													
Filter:									Perio	od of: 25.	11.10 • 00:00	to: 01.01.25	• 00:00
ame	Selected	Tied together	Lock	Last modified	Author	Code	Customer	Category	Priority	Status	Start	Finish	Path
Root Folder													
2016													
software development pro				02.06.23 22:27	Admin A				100		23.11.15 08:00	25.01.16 12:00	Root Fold
Project 1				02.06.23 22:27	Admin A				100		26.01.16 00:00	16.02.16 00:00	Root Fold
new_software developme				02.06.23 22:27	Admin A				100		27.01.16 00:00	29.03.16 14:00	Root Fold
Project2				02.06.23 22:27	Admin A				100		09.03.16 14:00	29.03.16 14:00	Root Fold
2016_2_soft				02.06.23 22:27	Admin A				100		28.03.16 00:00	05.06.16 00:00	Root Fold
process ABC				02.06.23 22:27	Admin A				100		07.11.16 08:00	11.01.17 14:00	Root Fold
Template													
2011													
+ test													
Other													
 Construction 													
Template													
Building planning		Construction		02.06.23 22:27	Admin A				100		07.09.16 08:00	04.11.16 16:00	Root Fold
Origon planning		Construction		02.06.23 22:27	Admin A				100		27.10.16 08:00	25.12.16 16:00	Root Fold
Katomo planning		Construction		06.07.23 11:17	Admin A				100		28.11.16 08:00	26.01.17 16:00	Root Fold
± 2023													
2024													
Prepare project				19.03.24 09:44	Admin A				100		19.03.24 08:00	16.04.24 17:00	Root Fold
Building planning		_		19.03.24 09:55	Admin A				100		01.07.24 08:00	24.07.24 16:00	Root Fold
Project plan				19.03.24 09:56	Admin A				100		17.04.24 08:00	20.05.24 08:00	Root Fold
1		+											
1		6											
*5		-											
_													
						_							
						7							
					1								
					1								

- 3. Enter a name for the new portfolio in the Name field.
- 4. Filter is a free text field to delineate the information displayed below.
- 5. Select the directory where the required projects are located.
- 6. Mark the individual projects that should be included in the portfolio. You can also add projects from other directories if necessary.
- 7. Then click the **OK** button.

The **Rillsoft Integration Server Portfolio** dialog window shows you a list of existing portfolios in the left table. The newly created portfolio is marked in the list, and in the right table, you can review the content of the portfolio.

Rillsoft integ	ration server portfol	io														×
Neu	Delete	Properties]	Locking	c Optim	istic										
Name		Total pro	Available	Baselines load												
2011_portfolio		2	2	Select: <u>All Non</u>	e Reador	ly: <u>Al</u>	None	-				-			-	
2016 planning		3	3	Name	Tied toget	Readonly	Locked	Last modified	Author	Code	Customer	Category	Priority	Status	Start 👻	Finish
2016 portfolio		6	6	Prepare project				19.03.24 09:44	Admin A				100		19.03.24 08:00	16.04.24 1
Portfolio 1		5	5	Project plan				19.03.24 09:56	Admin A				100		17.04.24 08:00	20.05.24 0
Portfolio 2		3	3	Building planning				19.03.24 09:55	Admin A				100		01.07.24 08:00	24.07.24 1
Portfolio 2024		3	3													
				•												•
						ОК	Cance	I								Help

From the Total projects column, you can see how many projects the portfolio contains.

The Available projects column indicates how many projects from the portfolio you are allowed to read.

If the **Baselines load** option is marked, the base plans of projects will also be loaded when opening the portfolio. However, this can slow down the work with the portfolio.

By default, all available projects from the portfolio are marked, but you can remove the marking from individual projects before opening the portfolio.

Moreover, you can open the selected projects read-only by marking them in the Read-Only column.

Note: Although you can add projects with resources differing from the resource pool to the portfolio, upon opening the portfolio, a note will appear advising you to switch these projects to the resource pool with **Project > Project resources > Switch to resource pool**.

7.4 Open a project portfolio

In order to open a project portfolio, do as follows:

- Select the menu item File > File > Open project portfolio.
- The dialogue window **Open** appears.
- Select the required file.
- Click on the button **OK**.

The dialogue window **Project selection for portfolio** appears. A list of projects for the project portfolio is shown.

ame	To resource pool	Code	Customer	Category	Priority	Status	Start 💦	Finish	F	il name
Building planning	Project resources				100-	-	07.09.16 08:00	05.11.16 16:	\checkmark	Name
Prepare project	Automatically				100		19.03.24 08:00	16.04.24 17:	~	To resource pool
Project plan					100		17.04.24 08:00	20.05.24 08:	~	Code
Building planning					100		16.05.24 08:00	11.06.24 16:		Curtamor
									~	Customer
						¥			~	Category
	Pro	ject is	automa	tically		Projec	t is to be		\sim	Priority
	swi	tched t	to the re	esourd	:e		rtod man	ually	\checkmark	Status
roject works	with poo					LOIIVE	rteu mant	ally	\checkmark	Start
seource noo						o the	recource			
source poo						io uic	resource	poor	1	Finish
esource poo					1		resource	poor	~	Finish
Rillsoft Project					1		resource	poor	> >	Finish File name
Rillsoft Project	jects with project rea	sources in po alize.html	ortfolio, open t	hese projec	ts separat	tely and sw	ritch from the proje	ct resource to	the re	Finish File name source pool by means of the me

Note: Only projects that share a common resource pool can be included in the project portfolio.

If projects are coloured grey, it indicates a difference between project resources and the resource pool.

Include projects with project resources in the portfolio

Deviating projects being coloured grey can be added to the portfolio as follows:

• Automatic replacement of project resources.

The option **Replace deviating project resources by resource pool** updates the project resources by adding the resource pool at every opening of the portfolio. The view **Variance analysis** displays the changes in time of the projects graphically.



• Manual switching of project resource to resource pool.

In order to have the portfolio projects with significant differences in resources, they must be opened separately and you can switch from the project resource to the resource pool by means of the menu item **Project** > Switch > Resource pool.

Edit portfolio

You can use the following three buttons to do the following:

Select all projects – all projects from the list, that share a common resource pool, are included in the project portfolio. **Take out all projects** - all projects from the list are taken from the project portfolio out. **Add a folder** - search a new folder for projects **Add a file** - add single projects to the list

Select the projects you want to add to the project portfolio. If you want to enter other projects in the list, click on the appropriate button to add either a folder or a file.

Set the order of the project portfolio

The projects shown in the list can be sorted by the following parameters:

- Project name
- Code
- Category
- Priority
- Status
- Start of project
- · Finish of project
- File names

The selected order is then accepted by the project portfolio.

All views from the Gantt chart to break-even chart are available for the project portfolio. In the project portfolio you can run all the activities similar to a conventional project, that is, you can create activities, allocate resources, correct processes or store outputs.

7.5 Open a project portfolio in Rillsoft with interface to Rillsoft Integration Server

In order to open a project portfolio, do as follows:

- Select the menu item File > Open > Rillsoft Integration Server > Project portfolio.
- The dialogue Rillsoft Integration Server Portfolio appears.

R	RIS Portfolio													X	
	Client: EN_2016 New portfolio Delete port Name	folio	■ Properties Availabl	Locking Pessimistic Optimistic											
	2011 portfolio	2	2	Different project	Ulterent project resources substitute resource pool Reseilinge load										
	2016 portfolio	5	5	Select: All None	jaaseiines ioao at: <u>All None</u> Readonly: <u>All None</u>										
				Name	Readonly	Locked	Last modified	Code	Categ	Priority	Status	Start	▼ Finish	Path	
				✓ software developed			08.03.16 14:11 A			100		23.11.15 08:	00 25.01.16 12:00	Root Fo	
				Project 1		14.03.16	10.03.16 12:43 A			100		26.01.16 00:	00 16.02.16 00:00	Root Fo	
				✓ new_software c			08.03.16 14:07 A			100		27.01.16 00:	00 29.03.16 14:00	Root Fo	
				✓ 2016_2_soft			10.03.16 15:07 A			100		03.02.16 00:	00 24.02.16 00:00	Root Fo	
				Project2			10.03.16 12:40 A			100		09.03.16 14:	00 29.03.16 14:00	Root Fo	
l				•										•	
	OK Cancel														

- 3. Left, all portfolios are listed with information about project number in the portfolio and number of projects that are available for you, it is related to your access rights.
- 4. Right, you see all the projects from the selected portfolio. You can take out individual projects from the portfolio for this time by deleting the marking of appropriate projects or all projects by click **Select: All**.

RIS Portfolio														X
Client: EN_2016	e portfolio Propertie		ing essimistic ptimistic	all se	elected	all reado	only							
Name	Total pr Availa	bl 🔽 D	ifferent projec	t esources	substitute re	source pool	no	ne rea	adonly					
2011_portfolio	2 2	B	aselines load		1									
2016 portfolio	5 5	Select	: <u>All None</u>	Read	only: <u>All No</u>	ine								
		Name	e	Readonly	Locked	Last modified	Code	Categ	Priority	Status	Start	*	Finish	Path
		✓ so	ftware develc			08.03.16 14:11 A			100		23.11.15 08	00 25.0	1.16 12:00	Root Fo
	coloctor	Pr Pr	oject1		14.03.16	<103.16 12:43 A			100		26.01.16 00	00 16.0	2.16 00:00	Root Fo
	Selected	. I ne	w_software c			08.03.16 14:07 A	Ξ.		100		27.01.16 00	00 29.0	3.16 14:00	Root Fo
		20	16_2_soft		-	10.03.16 15:07 A	lock	ed	100		03.02.16 00	00 24.0	2.16 00:00	Root Fo
		⊡ Pr	oject2	re	ad only	10.03.16 12:40 A			100		09.03.16 14	:00 29.0	3.16 14:00	Root Fo

5. You can apply some projects read-only i.e. only to read in the portfolio, by selecting them in **Read-Only** column or all projects by click **Readonly: All**.

You can see at once on a red background if any projects are locked as well.

6. Click on the button **OK**.

Note: Only projects that share a common resource pool can be included in the project portfolio.

If project resources are differrent from the resource pool, the message appears.

Rillso	oft Project
	Following projects cannot be shown in a portfolio as their resources differ from the resource pool in project.
-	Initiation
	Individually open project by using the menu item 'Project/Switch to Resource Pool' can be switched to the resource pool.
	ОК

In order to have the portfolio accepted projects with significant differences in resources, they must be opened separately and you can switch from the project resource to the resource pool by means of the menu item **Project > Switch > Resource pool**.

Locking

- Pessimistic once a user edits something in the project, all other users can open the project only as a read-only copy.
- Optimistic each user can always edit the project.

The lock option is available only for the user, who also have the appropriate access rights.

Baselines load

Baseline slows the work with the portfolio. If you do not need a comparison with a baseline at the moment, you can open portfolio without a baseline.

Set the order of the project in portfolio

The projects shown in the list can be sorted according to the following parameters:

- Project name
- Code
- Category
- Priority
- Status
- Start of project
- Finish of project
- File names

Click on the selected column in the title area, e.g. Start.

Different project	Different project resources substitute resource pool												
Baselines load									P				
Select: <u>All</u> <u>None</u>	Select: <u>All None</u> Readonly: <u>All None</u>												
Name	Readonly	Locked	Last modified	Code	Categ	Priority	Status	Start 🔽 👻	Finish	Path			
✓ software developed			08.03.16 14:11 A			100		23.11.15 08:00	25.01.16 12:00	Root Fo			
Project 1		14.03.16	10.03.16 12:43 A			100		26.01.16 00:00	16.02.16 00:00	Root Fo			
✓ new_software c	\checkmark		08.03.16 14:07 A			100		27.01.16 00:00	29.03.16 14:00	Root Fo			
✓ 2016_2_soft			10.03.16 15:07 A			100		03.02.16 00:00	24.02.16 00:00	Root Fo			
✓ Project2			10.03.16 12:40 A			100		09.03.16 14:00	29.03.16 14:00	Root Fo			

The selected order is then accepted by the project portfolio.

Change portfolio properties

Click on the button **Properties**

RIS Portfolio-Properties		×
Name: 2016 portfolio		
Name	Start	Finish
Root Folder		
2016		
✓ software development process	02.11.15 08:00	30.12.15 12:00
🔍 🗹 Project 1	26.01.16 00:00	16.02.16 00:00
🔪 🗹 new_software development process	27.01.16 00:00	29.03.16 14:00
Project2	02.02.16 00:00	23.02.16 00:00
✓ 2016_2_soft	03.02.16 00:00	24.02.16 00:00
Template		
2011		
software development process	25.11.10 00:00	26.01.11 14:00
software process	25.11.10 00:00	26.01.11 14:00
test		
test_email	18.01.16 00:00	18.02.16 00:00
	13.02.16 00:00	05.03.16 00:00
Projekt2	13.02.16 00:00	05.03.16 00:00
OK Cancel		

If you want to add other projects to the list, click on the appropriate button to add either a folder or file.

7.6 Reload portfolio

If you are working in a multi-user environment, it may often be necessary to reload a portfolio where several people are working on different projects at the same time in order to view their changes.

With the help of the menu item **File > Reload Project > Portfolio** you can reload the current portfolio.



Alternatively, you can use a quick access.

Click the Reload icon on the Quick Access Toolbar.



Notes: If the Reload icon is not present, you can select Reload from the Customise Quick Access Toolbar menu item.


7.7 Cross-project links

In the portfolio you can link several projects with each other. **Important!** This function is only included in Rillsoft Project with **Rillsoft Integration Server** and links can only be edited in the portfolio.

In cross-project links, succeeding activities are shifted not automatically, but the program sets negative intervals instead. By means of the menu item **Project/Rillsoft Integration Server/Cross-project links**, you can check these links and obtain detailed information about them, such as occurring delays.

You can choose whether you want to accept only single or all of the changes you have made to these settings.

love	Outbound project / Activity	Incoming project / Activity	Start 🔻	Finish	Reserve	Delay, release	Delay, calcul
	1.12 End	2.1.1 task 1	20.01.16 12:00	26.01.16 08:00	+5.83	0	
	2.3 project end	3.1.1 software development planni	11.02.16 09:00	27.01.16 08:00	-15.04	-15.04	-15.0
]	4.6 task 6	5.1.1.1 software development plan	29.03.16 14:00	03.02.16 08:00	-55.25	-16.38	-55.2
	3.13 End	4.1 task 1	29.03.16 14:00	09.03.16 14:00	-20	-20	-2

The following information and options are available:

Move	The calculated delay will be compensated by the approved delay when you click on the check box.
Outgoing project / ac- tivity	Displays outgoing projects/activities.
Incoming project / ac- tivity	Displays incoming projects/activities.
Start	Shows, where a link starts.
Finish	Shows, where a link ends.
Reserve	Shows the interval between the outgoing and incoming positions in absolute time.
Delay, Release	Displays the value of the released interval.
Delay, Calculation	Displays the value of the calculated interval.

Red background colouring signals that there is a discrepancy between the released and the calculated delay.

Set to automatic

Click this button if all calculated delays should be automatically aligned with the released delays.

Types of links

The following link types are at your disposal:

Finish-Startthe "from" activity must finish before the "to" activity can startStart-Startthe "from" activity must start before the "to" activity can startFinish-Finishthe "from" activity must finish before the "to" activity can finishStart-Finishthe "from" activity must start before the "to" activity can finish

Properties	
0	
Link	
Predecessor: 2 task 4	ОК
Successor: 3 project end	Cancel
Link type: Finish to start	
Delay: Absolute time - 2 day	Delete
Color: Activity color 👻 🗹 Bold highlighted	

Time intervals

Intervals can be defined in Project properties in relation to the time unit of the duration (such as hours or days). Intervals can only be defined in absolute time (estimated duration including non-working time, such as: 10 hours or 2 days).

Intervals can have

- positive (such as: + 2 hours) or
- negative (such as: 50% = overlapping)

signs.

Highlight link

Links can be highlighted by means of colour or boldface.

Create cross-project link

New cross-project links can be only created by Rillsoft Project with Rillsoft Integration Server in the portfolio. In order to create a new cross-project link, do as follows:

• Choose the link type via the menu item Start > Insert > Link.



- Connect two activities by drawing your mouse from one activity of a project to another activity from another project.
- If necessary, enter the delay (positive or negative) by which you want to delay the "to" acticity depending on the selected link type.

Note: If you do not enter any delay, the delay related to positions of outgoing and incoming activities is automatically calculated.

• Click on the button **OK**.

CHAPTER

EIGHT

PROJECT CONTROLLING

8.1 Project controlling

Project controlling consists of the following:

- Entering information about the project progress
- Setting of cutoff date
- · Analyse of ongoing and waiting activities

Enter information about the project progress

The updating of information about a selected activity can be accomplished by entering the activity's percentage of completion at regular intervals.

In order to enter the completed activity's percentage, do as follows:

- Mark the activity you want to enter in the diagram.
- Activate the tab General in the window Activity properties.
- Enter the percentage in the field **Completed**.
- Click on the button **OK**.

Prop	ertie	s											
	1.3	Name:	software inst	allation planning			Code:	Fixed:	Duration	✓ Effort:	18 Ph	Duration:	1.13 AT (8 Hrs.)
Ger	neral	✓ Roles	Employee	Timesheets	Material	Machine type	Machinery	Links	Format	User fields	Notes		
Due	e date –	Date	Time	Activity calendar: Project calendar		•	Completed:	100 %	Color:			r	ОК
۲	Start:	27.11.15	* 15:00			L CF	Fixed costs:	0€					Cancel
0	Finish:	30.11.15	* 16:00	Disregard team a	and employee o	calendar	Invoice amount:	0€					
	Fix			Start of activity of	only at first shift		Term of payment:	0 wo	ŕ				
	Mark as	milestone		Merge into one I	line		Receipt:	· *					

Alternative 1: You can enter the completion percentage in the context menu of the activity.

Alternative 2: Select a task and click the menu item Start > Schedule >...



Alternative 3: You can enter the completion percentage in the table of the Gantt chart in the columns Quantity, Effort and Duration below **Completed**. - click on **Gantt chart Format > Data > Columns** and select the required columns. - click on **Gantt chart Format > Data > Columns** and select the required columns.

Column arrangement				
Name	Unit	Description		Up
✓Nr.		Nr.		
Info		Info		Down
Name		Name		
Code		Code		Reset
UUID		Universally unique identifier		
Category		Category		
Priority		Priority		ОК
Status		Status		0.11
Deliverable		Deliverable		Cancel
Completed deliverable		Completed deliverable		
Open deliverable		Open deliverable		
Unit of measure		Unit of measure		
Standard	Pm	Standard		
✓Effort	Ph	Effort		
Completed	Ph	Completed effort		
Open	Ph	Open effort		
✓ Duration	AT	Duration		
Completed duration	AT	Completed duration		
Open duration	AT	Open duration		
✓Start		Start (date + time)		
Start		Start (date)		
Start		Start (calendar week)		
✓ Finish		Finish (date + time)		
Finish		Finish (date)		
Finish		Finish (calendar week))		
Earliest start		Earliest start		
Start reserve	day	Start reserve		
Latest finish		Latest finish		
Finish reserve	day	Finish reserve		
Fixed costs	€	Fixed costs		
HR cost	€	Human resource cost		
Material costs	€	Material costs	T	

• Enter eg., how much effort has been completed.

RE 🧀 E	5 े 🗆 र	GA	NTT CHART	software development process -															
FILE	START PROJE	CT F	ORMAT												^				
17-101	🔄 Variance analysis	100	Role	🏭 Em	nployee	Resour	ce chart 🝷	* Save				🛀 Activity 👻	+ = + - ·	T	V Cutoff date				
	🔋 Network diagram		🏜 📑 Team	* ! Ma	achine	🖄 Cost ch	nart 🝷	I 🗄 Manage		0× 25× 5	0% 75% 100%	🗂 Subproject 🝷	. 🗳 📲 🔹	X • •	Current date				
Gantt chart	Gantt-network ch	hart Empl	Other 🔻			🖫 Gantt d	:hart	🚍 Show 🔻	Project Resource	-	Щ.	້ວຍ Link 🔻	Structure	A 🔶	▼ Project start ▼				
	Activity views	Res	ource views	Capaci	ty views	Additior	nal view	User views	Properties	Sch	edule	Insert	Outline	Edit	Scrolling				
				Cutoff	date: 23.1	1.15 08:00				•	December 2015								
Nr.	Name	Effort	Completed	Open	Duration	Comple	Open du	Start	Finish	Compl	48	49	50	51	. 52				
⊡1	project plan	279	94	185	15.25			23.11.15 08:0	0 14.12.15 10:.	34			-	project plan	ning and oversight				
1.1	software dev	54	54	0	2.25	2.25	0	23.11.15 08:0	0 25.11.15 10:	. 100	soft	ware development	t planning						
1.2	system test p	76	40	36	4.75	2.5	2.25	23.11.15 08:0	0 27.11.15 15	. 52.63		system test plann	iing						
1.3	software inst	90	0	90	5.63	0	5.63	27.11.15 15:0	0 10.12.15 11:	. 0	H		softwar	e installation	ı planning				
1.5	software tran	44	0	44	2.88	0	2.88	03.12.15 16:0	0 08.12.15 15:.	0		4	software tra	ansition plan	ning				
1.7	following and	15	0	15	1.88	0	1.88	10.12.15 11:0	0 14.12.15 10:.	0				following an	d updating plans				
⊟2	establishing	288	0	288	9			14.12.15 10:0	0 25.12.15 10:.	0			,		establis				
2.1	software eng	160	0	160	5	0	5	14.12.15 10:0	0 21.12.15 10:.	0			•		h software engine				
2.2	software test	20	0	20	1.25	0	1.25	14.12.15 10:0	0 15.12.15 12:.	0			+	software	test environment				
2.3	software dev	42	0	42	2.63	0	2.63	14.12.15 10:0	0 16.12.15 16:.	0			4	softwa	re development libra				
2.4	software dev	36	0	36	4.5	0	4.5	16.12.15 16:0	0 23.12.15 11:	. 0				H I I	software dev				
2.5	non-delivera	30	0	30	1.88	0	1.88	23.12.15 11:0	0 25.12.15 10:.	0					non-deliv -				
•															r				
	1.2 Name: sy	ystem test pla	inning							Code:	Fixed:	Duration - E	ffort: 76 Ph	Duration:	4.75 AT (8 Hrs.)				
Genera	al 🗸 Roles	Employee	Timesheets	Ма	terial	Machine ty	pe Mad	chinery Lin	ks Format	User fields	Notes								
Due da	ate		Activity calend	dar:			C	moleted 52	63 % Color:	Autor	natic color	*			ок				
	Date	Time	Project calen	dar		•		ad as at as	0.0						Canaal				
Sta	art: 23.11.15 *	08:00					- Financing	ed costs:	UE						Cancer				
⊖ Fini	ish: 27.11.15 •	15:00		eam and e	employee c	alendar	Invoice	amount:	0 €										
			Start of act	ivity only a	at first shift		Term of	payment:	0 wor										
								Receipt:	v										
🗆 Ma	irk as milestone		Merge into	one line															
RESOURC	E POOL: http://local	host/ris6/21												K1:3					

Note: If there is a number of activities linked as **Finish-Start**, and if the successor has more than 0% in the field **Completed**, its predecessor is set automatically to the value 100%.

Setting of cutoff date

A cutoff date is the point of time at which the percentages were entered last time. A cutoff date is determined by means of a check mark (a small triangle in the upper part of the timescale).

Example: Gantt chart with determined cutoff date and percentages (black bar in activities).

R 🗀	<u>-</u> • ে ।	GANTT CHAP	रा			software development process														- [ı ×				
FILE	START PROJECT	FORMAT	Role Alt Employe	e I. Resource	chart 🔻	* Save				_		_		🚈 Activ	itv 🔻			1 4	q .	Ţ	-		Cuto	off date	^
	Network diagram		Team * Machine	Cost char	+ -	T Man	ane [-		0×	25× 50×	75× 10	×00	ta Subr	roject :	•			ā.	-			Curr	ent da	te
Gantt	Gantt-network chart	Employee	er T	Gantt ch	art	Shov	Pr	oject Reso	urce	-	# #	*		້ອງ Link	•		Struct	ure .	÷.,				Proi	ect star	~ + ▼
chant (Activity views	Resource vie	ws Capacity view	Additional	view	User vie	NS	Propertie	s		Sched	ule		Ins	ert		O	utline			Edit		Sere	lling	
						1								X,							Dec	ember 2	2015		
		Cutoff date: 07	.12.15 10:00		<	23 . 24	, 25 , 2	6 , 27 , 28	, 29 , 3	30 (01 , 02 ,	03 . 04	4 , 05	, 06 , 07	, 08 ,	09	10 , 1	1.1	2 , 1	3,14	4 , 15	, 16 ,	17 . 1/	8,19	20
Nr.	Name	Effort Duratio	in Start	Finish	Compl	МТ	W T	FS	S	м	T W	T F	S	S M	т	w	т	F	s s	S M	Т	w	TF	s	S
⊡1	project plan	279 15.3	25 23.11.15 08:00	14.12.15 10:00	60	-				-		-			-	_	_		-	-	proj	ect pla	inning	and o	versi
1.1	software dev	54 2.2	25 23.11.15 08:00	25.11.15 10:00	100		sof	tware de	/elopm	ent (olanning														
1.2	system test p	76 4.7	75 23.11.15 08:00	27.11.15 15:00	100	-		sys	tem te	st pl	anning														
1.3	software inst	90 5.6	3 27.11.15 15:00	10.12.15 11:00	0					-		H					L SO	ftwa	re in	stalla	ation	planni	ng		
1.5	software tran	35.5 2.2	25 03.12.15 16:00	08.12.15 09:00	51								-		SC	oftw	are tr	ansit	tion p	olann	ing				
1.6	software tran	8.5 0.6	63 08.12.15 09:00	08.12.15 15:00	0										1	oft	vare t	rans	ition	plan	ning				
1.7	following and	15 1.8	88 10.12.15 11:00	14.12.15 10:00	0			0									•			-	follo	wing a	and up	dating	plan
-2	establishing	288	9 14.12.15 10:00	25.12.15 10:00	(
2.1	software eng	160	5 14.12.15 10:00	21.12.15 10:00	C															-					
2.2	software test	20 1.2	25 14.12.15 10:00	15.12.15 12:00	0															+		softw	are te	st env	ironn
2.3	software dev	42 2.6	3 14.12.15 10:00	16.12.15 16:00	0															4		• • • •	softwa	ire de	relop
2.4	software dev	36 4	.5 16.12.15 16:00	23.12.15 11:00	0																	H			-
4																									
	ame: software developr	nent process																			Code				
Contra	- Desferred to an	Channel and all	Characteristic Characteristic	d and a bin and a l									later												
Gener	al Preferred team	Shared machi	ne types Shared	a machinery	neaders an	ditootens	rom	iat C	OIOF	U	ertields	P	votes										- r		
Due d	ate Data Tima	Project	calendar:	Proje	ct settings						Color:		Autom	atic color	*								L	OF	•
Q4.	22 11 15 - 00.00	1 Stan	fard	Time Time	e step: 1	hour			-		Use	for subo	ordinate	ed subpro	jects									Cano	cel
Start:	23.11.15 * 08:00	Categor	y: elected - ~	Priority: 100 Dura	ition: ir	workdav	(depende	nt on proie	ctc≁		and	activitie	s												
Finish	20.01.16 * 12:00) Status:	elected - · ·	100	4. D																				
		- Not s	elected -	т Eno	i. jr	hours			Ŧ																
		Baseline	e:		nter delive	able for a	tivity(Exa	mple: 150 l	A2)																
Cutof	f date: 07.12.15 + 10:00) softwar	e development proces	is (25.1 ▼ 🗹 E	nter effort f	or activity	Example:	5 man-hou	s)																
																			1						
RESOURC	E POOL: http://localhost	/1156/21														l	3 6	: li ;	: DA	¥1::	- · ·				

Analyse of ongoing and waiting activities

You can view the project information by clicking on the blank space in the window of the main project.

Properties								
Selected	portfolio:						Reload	d Remove
Project overview	Portfolio da:	shboard Ext	emal docu	uments				
Activities		Project			Ongoing	and yet-to-begin activities		
Completed:	3	Complete:	11	%	Nr.	Name	Duration	Difference
Started:	2	Reserve:	-5	day	1.4	software installation planning	4.5	-3.71
Still not started:	21							
All:	26							
					j 🛌			

- Completed Number of finished activities.
- Started Number of started activities.
- Still not started Number of activities that have not yet started.
- All Number of all activities.
- Reserve Difference in time between the finish date of the latest activity and the cutoff date of the project.
- Completed Percentage of the project's progress (is calculated only by means of the activities duration).
- **Ongoing and waiting activities** This list shows detailed information about activities that have just started or are ready to be started.

The column **Difference** shows the deviation between the actual progress of activities at the moment and at the cutoff date (negative difference: delay / backlog, positive difference: gain of time).

8.2 Add baseline

In order to add a baseline, do as follows:

R 🖬 🧀	a 5 👌			GANTT CHAR	RT	1
FILE	START	PROJEC	Т	FORMAT		¥ -
1	Earliest 9	start date	E	mployee 🔹	•	Add
Taka	🕨 Latest st	art date	N	lachine 🔹	¥	Select
over	Other functi	ions 🔻	5	Split activity	×	Delete
	Schedule			Assistant	Ba	aseline

• Select the menu item **Project > Baseline > Add**. The dialogue box **Add baseline** opens.

Re Add baselir	ne		x
Name:	software develo	pment process12_02_2016	-
	ОК	Cancel	

- Enter the name of the baseline in the field Name or accept the automatic name.
- Click on the button **OK**.

Note: You can save any number of baselines in the project. This allows you to document your changes in the project, on the one hand, and provides you with the opportunity to analyse your project after its completion and use this information for further projects.

8.3 Select baseline

To select a basic plan, please proceed as follows:



1. Click **Project > Baseline > Select**. The **Select baseline** dialogue opens.

Real Select base	ine	1****	×
Name:	Building planning BP15	2	*
2	Dynamic baseline Building planning BP11 Building planning BP15		

- 2. Click in the Name field by the arrow.
- 3. Select the desired baseline from the list.
- 4. Click on the button **OK**.

8.4 Dynamic baseline

As a project is continually being developed and updated, none of the saved baseline plans, which is only a momentary recording the project status, can provide a complete overview.

Here comes a so-called dynamic baseline plan to help, which is automatically generated from all stored baselines.

The selection of which baseline to use as a reference baseline for each activity is done automatically according to the following rules:

- If a Completed Percentage of an activity is equal to zero, the last saved baseline in time is taken as reference in a Dynamic Baseline for this activity.
- For the activities that have a Completed Percentage greater than zero, the base plan selected for each activity is the one that was saved last before the percentage was entered for each activity.

Note: Requirements for a dynamic baseline

- 1. Save baselines
- 2. Maintain completed percentage or effort

R 🛛 🧀	🗄 🕈 👌 🗖	Ŧ	VAF	RIANCE	ANALYSIS																			Pr	oject	2			
FILE	START PF	ROJECT		FORM	AT																								
Gantt chart	Gantt-netwo	gram rk chart		Time Effort Cost	Employee	Role Team Other •	Alt Em	ploy	ee e	н. Хо Е о	Reso Cost Gant	urce chart t cha	char • rt	t -	* I =	Save Man Shov	age v 🔻		Pro Re: Inf	oject souro o	e	0× →	25×	50×	75×	100×	ta t- ta	I Activ I Sub Link	vit pr
	Activity views		varian	ice analj	/sis Resource	views	Capaci	y vie	ws	A	aaiti	onai	view		Use	rvie	ws	1	rope	erties			20	neau	le			Ins	ser
		Cuto	ff date: 1	13.09.17	00:00		<<	10	-	Sep	otem	ber 20	17	40	40		~			~ ~	05		07	-		~~~			
Nr	Name	Effort	Effo	Dur	Start	Finish		12 T	13	14 T	15	16	17	18	19 T	20	21	22	23	24	25	26	27	28 T	29	30	01	02	U. T
1	Construction	24 40	+16	3	13.09.17 08:00	15.09.17 19.09.17	17:00 17:00	-				3	3	m	-	Con	stru	ctio	n	3	m	•	vv		F	3	3	m	İ
2	Mechanics	32 16	-16	4	18.09.17 08:00 20.09.17 08:00	21.09.17	17:00							-		}	_	Me	char	nics									
3	Assembly	32 40	+8	4 5	25.09.17 08:00	28.09.17 29.09.17	17:00 17:00														•					Ass	eml	oly	

Tip The more baselines are stored in a project, the more accurate a Dynamic Baseline will be. A disadvantage of this is that the size of a project increases with each baseline.

8.5 Delete baselines

In order to delete a baseline, do as follows:



• Select the menu item **Project / Delete baseline**. The dialogue box **Delete baseline** opens.

Delete ba	seline	x
Name:	software development process (25.11.10 13:27)	+
	software development process (25.11.10 13:27)	
	OK Cancel	_

- Choose the baseline you want to delete from the drop down list Name.
- Click on the button **OK**.

8.6 Variance analysis

A variance analysis helps you to identify differences between actual and target. The table and the diagram show you and highlight all parameter deviations from actual and target.

In order to do a variance analysis, do as follows:

• Activate the tab General and choose the preferred baseline from the drop down menu Baseline.

Name:	software developmen	nt process
General	Preferred team	Shared machine types Shared machinery
Oue date		Project calendar:
	Date Time	1 Standard 👻
Start:	23.11.15 👻 08:00	Category: Priority:
Detals	20.01.16 × 12.00	- Not selected - 👻 100
Finish:	20.01.10 12.00	Status:
		- Not selected -
		Baseline:
Cutoff date	: 07.12.15 * 10:00	software development process12_0 -
		- Not selected -
RESOURCE PO	OL: http://localhost/ri:	s6/21 software development process (25.11.1(software development process12_02_2)

• Select a previously saved baseline and select the menu item **Project > Baseline > Select**.



- Click on the button **OK**.
- Select the menu item **Start > Activity views > Variance analysis**. The **Variance analysis** opens:



The first row in the table lists the properties of the scheduled activities and subprojects (TARGET), while the second row lists the actual properties of the activities and subprojects (ACTUAL). Parameters deviating from the baseline are marked in yellow.

Note: Detailed information about the variances can be obtained by marking the activity in the table (see green arrow) and selecting the corresponding tabs in the box Object properties.

Only difference

Select the menu item **Variance analysis Format > Show > Only difference**. This option turns off all activities, where there is no difference. So you can get only relevant information to the Variance analysis.

🛃 🧀 🗔 🏷 🔿 🗔 Ŧ	VARIANCE ANALYSIS	2016_2_soft
FILE START PROJEC	FORMAT	
Columns Sort Renumber	Role Custom fields Teams ✓ Notes & links Employee Other Tooltips ▼	s Start date Project start I Current date Critical path Links s Finish date Project end Milestone in calendar I Labels Only different Cutoff date Reserve time
Data	Tooltips	Progress line Show

Progress line of the project

A progress line displays graphically deviations of the cutoff date that occurred between the actual project status and the selected baseline and is displayed in the **Variance analysis**.

Ideally, a progress line accords with the marked cutoff dates and runs vertically across the variance analysis. A progress line running left from the cutoff date indicates a delay in the project course.

A progress line running right from the cutoff date, indicates that some activities of the project will be completed earlier than scheduled.

In order to visualise the progress line of a project, select one of the following menu items **Variance analysis > Progress line**



- Start date
- Finish date

8.7 Control of project financing

R 🛛 🗀 🖡	500,	GAN	NTT CHA	RT						new_s	oftware deve	elopment p	ocess						-	□ ×
FILE	START PROJEC	F F	ORMAT																	~
Gantt chart	Variance analysis Network diagram Gantt-network cha	Emplo	yee Ot	Role Team her 💌	A Empl	oyee ine	Resource ∧ Cost cha ✓ Liquid	e chart 🝷 art 🍷 ity - Invoic	⁺⊟ Save I ⊟ Manage te Amount	e Proje	ct Resource	0× 25×	50× 75×	100×	Activity • • Subproject	• Etru	cture	▼ ▲	Cutoff d Current Project s	ate date tart 🔻
	Activity views	Res	ource v	iews	Capacity	riews	Liquid	ity - Term	of Payment s	Pr	operties	So	hedule		Insert		Outline	Edit	Scrollin	
	C	utoff date: 2	27.01.16	00:00			~~			>	Fr	ebruary 201	•				•	March 2	016	^
Nr.	Name	Effort	Dur	Start		Finish	1	04		05	. 06		-)7 .	0	8 .	09	. 10	. 1	1 .	12
⊡1	project plan	279	13.38	27.01	.16 08:00	15.02	2.16 11:00	-	-	_		proj	ect plann	ing and	l oversight					
1.1	software dev	54	2.25	27.01	.16 08:00	29.01	.16 10:00		Hsoftware d	tevelopm	nent plannin	g								
1.2	system test p	76	4.75	27.01	16 08:00	02.02	2.16 15:00	4	S S	ystem te	st planning									
1.3		0	0	03.02	16 16:00	03.02	2.16 16:00		F	5										
1.4	software inst	90	5.63	03.02	16 16:00	11.02	16 12:00		L		SO	ftware ins	allation	plannin	g					
1.6	software tran	44	2.88	05.02	16 08:00	09.02	2.16 16:00			L	softwa	are transit	on plann	ing						
1.8	following and	15	1.88	11.02	16 13:00	15.02	2.16 11:00					Lfollo	wing and	l updati	ng plans					
=2	establishing	288	9	15.02	16 11:00	26.02	.16 11:00								establishir	ng a sofi	tware devel	pment env	ironment	
2.1	software eng	160	5	15.02	16 11:00	22.02	2.16 11:00					-		H softw	are engineeri	ing envir	ronment			
22	software test	20	1.25	15.02	16 11:00	16.02	2.16 14:00					-	ftware t	est env	ironment					
23	software dev	42	2.63	15.02	16 11:00	17 02	16 17:00						softwar	e develo	opment library	/				
24		0	0	19.02	16 08:00	19.02	2 16 08:00						100							
2.5	software dev	36	4.5	18.02	16 08:00	24.02	16 12:00						1000		software deve	lopment	t files			
2.6	non-delivera	30	1.88	24.02	16 13:00	26.02	16 11:00								non-delive	rable so	oftware			
= 3	system regu	141	5 75	26.02	16 11:00	07.03	16 09:00										system r	equirement	s analysis	
31	analysis of u	57	2 38	26.02	16 11:00	01.03	16 15:00									nalysis	of user inpu			
3.2	onerational c	54	3 39	01.02	16 15:00	07.03	16 09:00											nal concept		
3.2	evetem requi	30	1.99	01.03	16 15:00	03.03	16 14:00									syste	em requirem	ents		
4	system design	84	5.25	01.03	16 15:00	08.03	16 17:00										syste	n desian		
5	software reg	60	3.75	01.03	16 15:00	07.03	16 12:00										software	requireme	nts analysis	
6	Soliware req	00	0.75	00.03	16 09:00	00.03	16 08:00													
	coffware im	0	5	00.03	16 09.00	15.03	16 17:00											50	ftware imple	mentati
71	software imn	0	5	09.03	16.08:00	15.03	16 17:00											-50	ftware imple	mentati 🔻
— Actu — Targ — Fina	ual cost let cost ancing					200 160 120 80 40	000.00 € - 000.00 € - 000.00 € - 000.00 € - 000.00 € -		3 360.00 €	35 000.	00€;	26.021.99	62 0	00.00€	1	4 <u>9 980</u> .	107 00€	000.00€		
4																				•
Properties																				
RESOURCE	E POOL: http://localhe	ost/ris6/21														8	🗄 📊 WEEK	1:3	I	- +

In order to evaluate the project financing, proceed as follows:

• For the gantt chart open an additional break-even chart in the menu item Start > Additional views > break-even chart.



- Record all expected incoming payments by setting a separate milestone at the date of invoice.
- The break-even chart contrasts the actual costs with the financing. The the invoices dates are marked at the curve Actual costs.

Note: The financing can be displayed by either the invoices dates or the payment term.



• You can toggle between the menu items Financing - Invoice date and Financing - Term of payment.



• Similar to the date of invoice, the dates identical with the payment term are highlighted at the curve Actual cost. The financing control allows you therefore to detect investment risks (advance financing).

CHAPTER

NINE

PROJECT MANAGEMENT

You can use Rillsoft Project 6.1 for the following tasks, so as to accomplish the successful completion of your project targets or even exceed them and prevent the schedule from getting delayed or, at least, mitigate the consequences of possible risks:

- separation of completed activities from waiting activities.
- shifting of delayed activities to the cutoff date (actual date).
- assignation or reassignation of employees to and from activities in the ongoing project.
- assignation of employees to critical activities to speed up execution.
- optimisation of resource utilization of not yet completed project activities.

A project sample before updating

R <mark>e</mark> 🔎		5 े 🗆 🕫	GAN	NTT CHART						soft	ware dev	relopme	ent p	process													- 1	□ ×
FILE		START PROJE	CT FC	ORMAT																								^
Gant		Variance analysis Network diagram Gantt-network ch	art Emplo	Note National States Other	e 41 Employe	e Resource	e chart ▼ rt ▼ art	ing Sav	ve inage ow *	Proje	ect Reso	urce	×0	25× 50	× 75	× 100×	t= t- to	Activ Subp Link	ity • project • •	Sti	ructur	+= -= 	- 1 - 1	₹ ~~	•	Cut Cut Pro	off dat rent da ject sta	e ite rt ▼
	A	ctivity views	Res	ource views	Capacity view	Additiona	Iview	User v	lews	P	ropertie			Sche	aule			Ins	ert		Outi	ine		Edit	oombo	- 2015	olling	
			Cutoff	date: 07.12.	15 10:00		<	23	24 . 2	5 . 26	27 . 28	, 29 , 3	0	01,02	03	. 04 . 0	5,0	6 07	, 08 , 09	9 , 10	0,11	. 12	13 .	14 , 1	5 , 16	. 17 .	18 , 19	20
Nr.		Name	Effort	Duration	Start	Finish	Compl	м	τV	N T	F S	S I	N	тw	т	F :	s s	S M	T W	т٧	F	S	s	M 1	r w	т	FS	S
⊡1		project plan	279	15.25	23.11.15 08:00	14.12.15 10:00	60	-		_			-	_			-			-	-		-	y pro	ject p	lannin	g and c	oversi
1	.1	software dev	54	2.25	23.11.15 08:00	25.11.15 10:00	100		-	<mark>softw</mark>	vare dev	elopme	ent	plannin	g													
1	.2	system test p	76	4.75	23.11.15 08:00	27.11.15 15:00	100	-			sys	tem tes	st p	lanning														
1	.3	software inst	90	5.63	27.11.15 15:00	10.12.15 11:00	0				-	-	•		H						soft	ware	insta	llatior	n plan	ning		
1	.5	software tran	35.5	2.25	03.12.15 16:00	08.12.15 09:00	51								4	-		_	soft	twar	e tran	sitio	n plan	ining				
1	.6	software tran	8.5	0.63	08.12.15 09:00	08.12.15 15:00	0												S0	ftwa	re tra	nsitio	on pla	inning]			
1	.7	following and	15	1.88	10.12.15 11:00	14.12.15 10:00	0			L														∎_foll	owing) and u	pdatin	g plan
2		establishing	288	9	14.12.15 10:00	25.12.15 10:00	0																	-				
2	.1	software eng	160	5	14.12.15 10:00	21.12.15 10:00	0																H					
2	.2	software test	20	1.25	14.12.15 10:00	15.12.15 12:00	0																ŀ		soft	ware t	est env	vironn
2	.3	software dev	42	2.63	14.12.15 10:00	16.12.15 16:00	0																4			softw	are de	velop
4	.4	software dev	36	4.5	16.12.15 16:00	23.12.15 11:00	0																		4			• •
	New	a finana dava	loomont proc																					1				
	Indiii	e. sonware deve	sopinent proc																						ie.			
Ge	eneral	Preferred tear	n Shar	ed machine t	types Shared	machinery	Headers and	footers	s	Format	: C	olor	U	ser fields		Notes										_		
- Du	ue date	•		Project cale	endar:	Proje	ect settings							Color:		Auto	matic	color	~								0	ĸ
		Date T	ìme	1 Standard	- E	Time	e step: 1	hour				-			ofor	subordin	ated	suborr	niects								Can	cel
S	tart:	23.11.15 * 0	00:80	Category:	F	Priority:	ation: in	workda	welder	nendent		tor		and	acti	vities		oupro	10010									
Fi	inish:	20.01.16 * 1	12:00	- Not selec	cted - 🔻	100		workud	aya(uc)	pendent	on projec																	
			-	- Not seler	cted -	- Effo	rt: in	hours				*																
			-	Baseline:			Enter deliver	able for	activit	y(Examp	ole: 150 N	12)																
0	utoff d	ate: 07.12.15 🔻 1	10:00	software d	evelopment process	s (25.1 ▼ 🗹 E	Enter effort f	or activi	ty(Exa	mple: 5 r	man-hour	s)																
RESO	URCE	POOL: http://locali	host/ris6/21																	E			DAY 1	:1 -				- +

Separation of completed activities from waiting activities

• Rightclick on the activity and select from the context menu the command Split > From complete supply .

Shifting of delayed activities to the cutoff date (actual date)

- Set the cutoff date.
- Enter the completion percentages of all activities.

Propertie	s												
1.3	Name:	software inst	allation planning			Code:	Fixed:	Duration		18 Ph	Duration:	1.13 AT (8 Hr	s.)
General	✓ Roles	Employee	Timesheets	Material	Machine type	Machinery	Links	Format	User fields	Notes			
Due date	Date	Time	Activity calendar: Project calendar		•	Completed:	100 %	Color:			r	(эк
Start:	27.11.15	× 15:00	Disregard team	and employee	calendar	Fixed costs: Financing	0 €					Ca	incel
○ Finish:	30.11.15	▼ 16:00				Invoice amount:	0€						
🗆 Fix			Start of activity	only at first shift	t	Term of payment:	0 wo	ori					
🗌 Mark as	s milestone		Merge into one	line		Receipt:	· •						

• Select the menu item Project > Schedule > Other functions > Move delayed activities to cutoff date.

Assignation or reassignation of employees to and from activities in the ongoing project

Properties														
2.2 Name: software tes	t environment			Co	de:	Fixed:	Duratio	n 👻 Effort:	10	Ph	Durat	tion:	1.25	AT (8 Hrs.)
General 🗸 Roles 🗸 Employee	Timeshee	ets Mat	erial Machine type	Mac	hinery	Links	Forma	at Userfields	No	otes				
Assigned roles:	Filter:			- 2	Assigned	employees:			Reso	ource po	ol			ОК
Role - qualification	Name	On-call Av	ail Role - qualification	Pr	Name	0.	. A	Role - qualification	Pr	Util	A	Effort	Ν	Cancel
programmer - V.Basic	Eager	100	100 analyst	100	Diligent	10	D 100	programmer - V.B	100	100		10		
⊡analyst	Think	100	100 analyst	100									_	
	•			Þ	•								Þ	
Preferred and assigned teams	Check av	ailability in cu	rent portfolio		Utilize	resources to	the ma	ximum						

- Mark the activity.
- Activate the tab Employees in the window Object properties.
- Remove the employee from the activity.
- Click on the button **OK**.

Alternatively: You can remove an employee from several activities at a time. Select the menu item Project > Assistant > Employee > Remove the employees from the activities.

Assignation of employees to critical activities to speed up execution

- Mark the critical activity.
- Activate the tab **Employees** in the window **Object properties**.
- Assign more employees to the activity.
- Click on the button **OK**.

Optimisation of resource utilization of not yet completed project activities

- Set the cutoff date.
- Enter the completion percentages of all activities.
- Select the menu item **Project > Schedule > Other functions > Optimise resource utilization**.

Note: Delayed activities will be automatically shifted to the cutoff date during the optimisation of resource utilization.

CHAPTER

TEN

PRINT

10.1 Printing

You can print all views of a project and report about the project schedule and project resources.

- Select the view according to your requirements.
- Check the content in the preview field.
- Print the document.

Select either view or report

You can select a view by clicking the menu item Start and one of the activities, resource or capacity views.



Print preview

In order to obtain a print preview, do as follows:

- Choose the menu item **File > Print**.
- Check the appearing dialogue **Print preview** and correct the parameters, if necessary.
- Click on the button **OK**.

Printing

There is a number of ways for how to print a document:

- Select the menu item **File > Print...**.
- After checking the print preview, click on the button **Print**.

10.2 Print preview

You can print the project details as views or tables as they are shown on your screen.

After editing the project details (filter, formatting, view changing, etc.) in the preferred view, you can check the layout, that is, the positions of the project details in the print preview.

For this purpose, you can use the page view function, which shows either a single page or several pages in a small scale of depiction. Project details can not be edited in the page view modus.

You can use the menu item **File > Print** to define the print settings.



Among others, you can fit a project schedule to one or several pages by entering the preferred number of pages in **Scale** and marking the check box **Fit to page size**.

Scale		Print on all pages
 Reduce/Enlarge: Customize to: 	100 * % 1 * horizontal and 2 * vertical pages	 ✓ Header ✓ Footer ✓ Calendar line ✓ Table columns
Print on all page	es	

10.3 Print view

Rillsoft Project offers the following views:

- Activities views
 - Gantt chart
 - Variance analysis
 - Network chart
 - Gantt-network chart
- Resource views
 - Role usage
 - Team usage
 - Employee workload
 - Material requirements
 - Machine types
 - Machinery
- Capacity views
 - Human resource capacity planning
 - Machine capacity planning

In addition, you can create your own views.

In order to print a view, do as follows:

- Select the view that contains the information you want to print.
- Edit the header / footer for the project printing.
- Select the menu item **File > Print**.
- After checking the print preview, click on the button **Print**.

Header and footer

- In the window Project properties, select the tab Header and footer.
- Click on one of the six text boxes to which you want to add the information and enter a text. You can also add project details from the drop down menu **Fields**.
- If necessary, repeat step 2 for all other boxes.
- Alternatively, you can add texts and graphics, (such as Logo-Picture) from the clipboard.
- You can also add project details from the drop down menu Fields.
- Click on the button **OK**.

Properties									
Name:	Project1	1						Code:	
General	Preferred team	Shared machine ty	/pes Shared machinery	Headers and footers	Format	Color User	fields Notes		
Fields: View nar	me	->		%n	roject n	ame%			ОК
Times New Ro	man	- 12 -		1 volu	oject_n				Cancel
Bold									
Lalic							Rills	oft	
Underlined									
		I							

Edit the view you want to print

Quite often the document looks differently on the screen than in the print preview. You can do the following: - define the type and size of the font in the text field - add/remove entries from headers / footers - change text and bar displays - enlarge or reduce vertically

View as PDF file

In order to print as PDF file, you need to

- install a PDF printing device (such as Adobe Installer or a free program)
- Prepare a view for printing (see above)
- Select the menu item **File > Print**.
- Define an available PDF printing device in the dialogue **Print** above the list field **Printer**.
- Click OK.

10.4 Print holiday report

You can print non-working days of the employee for a requested period as a pdf-file.

Employee_2016_non_work



Note: Non-working days should be registered in the Resource pool for employees.

endar I	Roles Tea	ams Employ	ree Mate	rial Machine type	e Machiner	y Project c	ategories	Project status	Derect Del	Delete Course		
er.				10/18 Net	w Group	New in th	e Group	import	Export De	Delete Group	Del	ete Ali
Nr.	Firsna	Lastname	Code	E-mail	Calendar	Begin	End	Non-working d	Working group - team	Role - qualification	Pr	C(📥
2.01		Superman		superman@ex	2 all		1	19.07.10-23.07		13.001 manager	100	50
3.01		Tidv					•	19.07.10-23.07	11.001 North - Team A	11.001 programmer - C++	100	4(
3.02		Tidy						19.07.10-23.07	11.001 North - Team A	11.003 programmer - V.Basic	100	4(
4.01		Diligent						25.11.10-26.11	13.001 East	11.003 programmer - V.Basic	100	4(
4.02		Diligent						25.11.10-26.11	13.001 East	11.002 programmer - PHP	100	4(
5.01		Goeslike		goeslike@exa		11.10.10		24.12.10;27.12	12.001 South	16.001 support	100	4(
5.02		Goeslike		goeslike@exa		11.10.10		24.12.10;27.12	12.001 South	12.001 writter	100	4(
6.01		Sleeper						30.11.10;01.12	14.001 West	11.001 programmer - C++	100	5(
6.02		Sleeper						30 11 10:01 12	14 001 West	14 001 designer	100	5(

- Create a project with a beginning and an end, which defines a reporting period. For example, the 01.01.2016 is the beginning and 31.12.2016 is the end
- Click on Start > Resource views > Employee



• Select the menu item **Start > Outline > Structure** and define the employee structure. For example **Team > Employee**



- Check which columns should be displayed, by selecting the menu item **Employee format > data > columns** and switch on/off the required columns.
- Click Start > Edit > Filter and delete a marker of To choose only planned resources from offer option

Re Filter			X
Project			
Project / Subproject: Emp	loyee_2016_non_work		-
Deried			
Penod			
□ Peri 01.01.16 🔻 00	:00		
to: 31.12.16 - 00	:00		
Activity			
Hide completed activiti	es		
2			
Resources			
Show only overloaded	resources		
Only already planned re	esources to choose from offer		
Nr.	Name	Code	Costs 📥
Roles			
15.001	analyst		70.00
14.001	designer		60.00
13.001	manager		60.00
11.001	programmer - C++		50.00
11.002	programmer - PHP		45.00
11.003	programmer - V.Basic		50.00
16.001	support		30.00
12.001	writter		30.00
Teams			
13.001	East		90.00
11.001	North - Team A		90.00
12.001	South		90.00
14.001	West		90.00
Employee			
21.01	Consider (11.002 programmer - PHP)		40.00
21.02	Consider (11.003 programmer - V.Basic)		40.00
14.02	Diligent (11.002 programmer - PHP)		40.00
14.01	Diligent (11.003 programmer - V.Basic)		40.00
17.02	Eager (11.001 programmer - C++)		50.00
17.01	Eager (15.001 analyst)		50.00 💌
	OK Cancel		

• Select the menu item **File > Print** and define print settings.

CHAPTER

ELEVEN

CUSTOMIZE PROGRAM ENVIRONMENT

11.1 Adjustments of the program environment

You can adjust Rillsoft Project's environment parameter via the menu item **File > Options ...**. The following parameters are adjustable:

Options	
General	
Display	
Extended	
Customize Ribbon	
Quick Access Toolbar	

- Tab General Adjusting the default parameter
- Tab Display Adjusting the size, the font, the color etc. of the different objects
- Tab **Extended** Adjusting the settings for the appearance of the tabs in views, avtivity properties and project/subproject
- Tab Customize Ribbon Adjusting the Ribbon
- Tab Quick Access Toolbar Adjusting the Quick Access Toolbar

11.2 General

Options		×			
General	General				
Display	Rillsoft-Design: White 🔹				
Extended					
Customize Ribbon	Default location				
Quick Access Toolbar	Projects: C:\ProgramData\Rillsoft Project 7.0\Projects				
	Portfolios: C:\ProgramData\Rillsoft Project 7.0\Portfolios				
	Templates: C:\ProgramData\Rillsoft Project 7.0\Templates				
	Reports: C:\ProgramData\Rillsoft Project 7.0\Reports				
	Default parameters for new activity				
	Fix: Duration +	Disregard team and employee calendar			
	Duratior 8 h.	Start of activity only at first shift			
	Extended				
	Show help	Auto restore: 5 🗘 min.			
	Cutoff day move to current date	Currency: €			
	Label resource chart	Undo depth: 100 ‡			
	Represent weekend	Activity are critical, 0 h. if buffer less than or equal:			
	Represent nonworking days	$\ensuremath{\boxtimes}$ Read-only projects in the portfolio of grey			
	Calculation of reserve time	☑ Different project resources substitute			
	Represent working time	resource pool			
	Integration Server				
	Enter commit comment for project versions	Use a proxy server for your LAN			
	Timeout: 600 s	Adresse:			
	HTTP authentication	Port number: 8080			
	User name:	User name:			
	Password:	Password:			
		OK Abbrechen			

General

Rillsoft-Design: Select color scheme for the program.

Default location You can create folders for reports, projects and templates.

- **Projects:** Select a folder for the projects
- Portfolios: Select a folder for the portfolios

- **Templates:** Select a folder for the templates
- **Reports:** Select a folder for the reports

Default parametrs for a new activity

- **Fix Duration** If you select this option, the effort and the utilization of the resource is calculated, while the activity's duration remains possible. You should select this option if you are planning on the basis of the well-known activity duration. The resource effort is then automatically calculated.
- **Fix Effort** If you select this option, calculates the resource utilization and activity duration while the effort remains constant. You should select this option if you are planning on the basis of the known activity effort for activity roles. The activity duration is calculated automatically.
- Duration Specify the default value for new activities.
- **Disregard team and employee calendar** Select this check box if team and employee calendars should not be included in new activities.
- Start of activity only at first shift Select this check box if the start of the activity may begin only on the initial layer.

Extended

- Show help Select this check box so that the help of all objects is displayed.
- Cutoff day move to actual day Mark this check box to automatically set the cutoff date on the actual date.
- Label resource chart Mark this check box to label the resource bars on the resource chart with the actual value.
- Represent weekend Select this check box to represent weekends and holidays in the views.
- Represent nonworking days Select this check box to represent nonworking days in the views.
- **Reserve time calculation** Mark this check box to automatical calculation when project changes to the contingency reserve in activities. If this option is switched off, earliest- and latest possible start- and end of activities in the activities table are not represented.
- Auto restore: Enter the time interval in which a backup of your project must be created.
- Currency: Enter the currency code.
- **Undo depth:** Enter in this field a value for undo.
- Activities are critical, if buffer is smaller or equal: You define a value, when the activities should be considered critical.
- **Read-only projects in the portfolio of grey** When a portfolio is opened, read-only projects are represented in grey colour.

Rillsoft Integration Server:

You can set the settings for working with Rillsoft ntegration Server.

- Enter commit comment for project versions You can add comments for each project version.
- **Timeout** Enter in this field a value for the time spent waiting for a response from the Rillsoft Integration Server before either has to be transmitted again or the connection with a (timeout) error is cancelled.
- **HTTP authentication** authenticate for Webserever, where among other things, Rillsoft Integration Server is installed for more access.
 - User name Enter the user name to connect to the Web server. Important: It is not a user name for Rillsoft Integration Server!
 - **Password** Enter the password to connect to the Web server. Important: It is not a password for Rillsoft Integration Server!

- Use proxy server for your LAN You can configure Rillsoft project that there is a connection to the Rillsoft Integration Server by a proxy server.
 - Address Enter the address of the proxy server.
 - **Port number** Enter the port number.
 - User name Enter the user name to connect to the Rillsoft Integration Server.
 - **Password** Enter the password to connect to the Rillsoft Integration Server.

11.3 Display

You can adjust color and size of the different objects.

Options				×
General	Activity			
Display	Que de ch	Defention of	Education	Arial/9)
Extended	Standard:	Default color *	Exterior:	Ала(о)
Customize Ribbon	Completed:	Default color 🔻	Interior:	Arial(9)
Quick Access Toolbar	Project/Subproject			
	Standard:	Default color 🔻	Exterior:	Arial(8)
	Lines background:	•	Interior:	Arial(9)
	Resources			
	Roles background:	Default color 🔻	Waming background:	Default color 🔻
	Teams background:	Default color 👻	Work capacity Role independent:	Default color 🔻
	Employee background:	Default color 🔻	Work capacity:	Default color 🔻
	Material background:	Default color 🔻	Deficit:	Default color 🔻
	Machine types background:	Default color 🔻	Overload:	Default color 🔻
	Machine background:	Default color 🔻	Capacity requirements:	Default color 🔻
	Calendar			
	Cutoff data:	Default color 🔻	Begin/End:	Default color 🔹
	Filter period:	Default color 👻	Current day:	Default color 🔻
	Project start:	Default color 👻	Vacation:	-
	Project finish:	Default color 🔻	Total utilization:	Default color 🔻
	Weekend/holidays:	Default color 🔹	Font:	Arial(8)
	Scheduling			
	Positiven Reserve:	Default color 👻	Date exceeded:	Default color 🔻
	Negativen Reserve:	Default color 👻	Critical path:	Default color 👻
	View			
	Difference between actual and	t Default color 👻	Table:	Arial(9)
	Target cost:	Default color 👻	Utilization:	Arial(8)
	Actual cost:	Default color 🔻	Linear:	Arial(10)
				OK Abbrechen

The parameters are mostly intuitively understandable.

View

Lineal Left you can define the font in the additional diagrams such as resource or Gantt chart.

Change font and font size

You can change the fonts and font size to views, such as the chart area, as well as the table.

- First, click the menu item File > Options > Display
- Select the desired options



11.4 Extended

bisplay Versa visitomize Ribbon Quick Access Toolbar O ToDo Quick Access Toolbar Machine types toolbar Quick Access Toolbar Quick Access Toolbar Quick Access Toolbar Quicheretypes </th <th>Seneral</th> <th>Extended</th> <th></th>	Seneral	Extended	
Automize Ganti chat Sustanize Ribbon Vatance analysis Duick Access Toolbar ToDo O ToDo O Ganti chat O Vatance analysis O ToDo Duick Access Toolbar Ganti network chat O Rele usage Employee usage Machine yuage Machine yuage Timesheets Machine yyee Timesh Machine yyee)icolay	Viewe	
Attended Order: Object Wationice analysis Wationice analysis Wationice analysis ToDa Wationice apacty planning Wationice apacty planning Wationice analysis General Wationice apacty planning Wationice <tr< td=""><td>rispiay</td><td>Views</td><td></td></tr<>	rispiay	Views	
Lustomize Ribbon Image: Color Quick Access Toolbar Image: Color Quick Access Toolbar Image: Color	xtended	Variance analyzia	
Uick Access Toolbar O ToD Network dagram O Satt network chat Role usage Employee usage Machine types usage Machine types usage Machine capacity planning Activy Properties Orena Role usage Machine capacity planning Activy Properties Orena Role usage Machine capacity planning Activy Properties Orena Role ecapacity planning Activy Properties Orena Wachine pyse Machine pyse	ustomize Ribbon		
Jusci Access toologal Outwork dagram Garitt network chat Projecusage Employee usage Machine types Machine types General Poles Employee Timesheets Machine types	Quick Access Toolbar		
 Fearward augustin Gatt network chart Fole usage Fole usage Employee usage Machine types usage Machine yes usage Machine yes usage Machine agoety planning Activity Properties General Foles Employee Timesheets Machine yes Machine yes Machine yes Machine yes Notes Format General Format General Format augustin Machine yes Conflict General General Machine yes Machine yes Machine yes Machine yes Machine yes Notes Format Guereal Machine yes Machine yes Machine yes General Machine yes Machine ying yes Machine yes Machine ying yes Machine ying yes Machine ying yes Machine ying yes Machin	ZUICK ACCESS TOOIDAI	Naturala dia ama	
Gardi-Havkork Char Gardi-Havkork Char Gardi-Havkork Char Gardi-Havkork Char Gardi-Havkork Char Gardi-		Cast actual chat	
 Note sugge Find usage Employee usage Machine types usage Machine types usage Machine types Machine types Machine types Machine types Machine types Machine type Enrol Machine type Machine types Machine types<!--</td--><td></td><td></td><td></td>			
 Team usage Material requirements Machine requirements General General Employee Material Machine types Material User fields Notes General Feams Machine types Machine types Machine types Machine types Machine types Second and the type type type type type type type typ			
Enployee Usage Matchine types usage Matchine yusage Human resource capacity planning Activity Properties General Roles Employee Timesheets Matchine yusage Matchine yusage Katerial Roles Employee Timesheets Matchine yusage Matchine yusage Matchine yusage Second State		I ream usage	
 Matchire types usage Machine yusage Machine yusage Muman resource capacity planning Activity Properties General Roles Employee Timesheets Material /ul>		Employee usage	
 Machine types usage Machine vapacity planning Human resource capacity planning Machine vapacity planning Activity Properties General Roles Employee Timesheets Machine types Machine types Machine types Machine types User fields Notes Format General General Statistic transmission Machine types Machine types Machine types Machine types General Statistic transmission Notes Froject/: Subproject Properties General Teams Machine types Machine types Machine types General Teams Machine types General General Teams General General Format Color User-defined fields Notes Corrflict Uneasigned resources Overallocated resources Faled resources Cash:: Redistribution Dynamic 		Material requirements	
 Metaninery usage Activity Properties General Roles Employee Timesheets Machine types Machinery Links Format User fields Notes Project/Subproject Properties General Machine types Notes Teams Machinery Engloyee Treams Machine types Notes Format General Format Teams Machinery Teams Machinery Teams Machinery Teams Machinery Teams Format Color User-fields Notes Format Color Linke types Yeaders and footers Format Color User-defined fields Notes Conflict Conflict Consequences Conflict Teams Faled resources Conflict Linksinged resources Conflict Conf		Machine types usage	
 Human resource capacity planning Machine capacity planning Activity Properties General Employee Timesheets Machine types Machine types Machine types Links Format General Notes Project/Subproject Properties General Machine types Machine types Solution Years General Teams Machine types Motion types Solution Votes Project/Subproject Properties General Teams Machine types Machine types<td></td><td>Machinery usage</td><td></td>		Machinery usage	
Activity Properties Activity Properties General Goles Timesheets Material Material Machine types Machine types Machine types Junks Format General General Machine types Junks Junks Seneral General Machine types Machine		Human resource capacity pla	nning
Activity Properties General Roles Ro		Machine capacity planning	
General Projece Timesheets Material Machine types Machine types Machine types User fields Notes Project/Subproject Properties General Machinery Headers and footers Format Color User fields Notes Color User fields Nachinery User fields Machinery Headers and footers Format Uurssigned resources Overallocated resources Overallocated resources Versellocated resources Late activities Experten Parameter Task: Redistribution Dynamic		Activity Properties	
 Holes Employee Employee Timesheets Machine types Machinery Links Format User fields Notes Project/Subproject Properties General Teams Machine types Machine types Machine types Machine types Format Color User defined fields Notes Conflict User defined resources Overallocated resources Experten Parameter Task: Redistribution Dynamic 			
Employee Timesheets Material Machine types Machinery Uinks User fields Notes Project/Subproject Properties General Teams Machinery Headers and footers Format Color User-defined fields Notes Conflict Unassigned resources Querallocated resources Valle resources Links Experten Parameter Task: Redistribution Dynamic		Roles	
Imasheets Material Machine types Machinery Links Format User fields Notes Project/Subproject Properties Machine types		Employee	
 Machine types Machinery Links Format User fields Notes Project/Subproject Properties General Teams Machine types Machine types Machinery Headers and footers Color Color User-defined fields Notes Conflict Unassigned resources Overallocated resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic 		✓ Timesheets	
Machinery Unks Format User fields Notes Project/Subproject Properties General Machinery Machinery Headers and footers Format Color User defined fields Notes Conflict Unassigned resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic		✓ Material	
 Machinery Links Format User fields Notes Project/Subproject Properties General Teams Machine types Machinery Headers and footers Format Color User defined fields Notes Conflict Unassigned resources Overallocated resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic 		 Machine types 	
✓ Links ✓ Format ✓ Notes Project/Subproject Properties ✓ ✓ General ✓ Teams ✓ Machine types ✓ Headers and footers ✓ Format ✓ Color ✓ User-defined fields ✓ Notes Conflict ✓ ✓ Verallocated resources ✓ Falled resources ✓ Late activities Experten Parameter		Machinery	
 Format User fields Notes Project/Subproject Properties General Teams Machine types Machinery Headers and footers Format Color User-defined fields Notes Conflict Overallocated resources Failed resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic 		✓ Links	
✓ User fields ✓ Notes Project/Subproject Properties ✓ ✓ General ✓ Teams ✓ Machine types ✓ Machinery ✓ Headers and footers ✓ Format ✓ Color ✓ User-defined fields ✓ Notes Conflict ✓ ✓ Unassigned resources ✓ Overallocated resources ✓ Failed resources ✓ Task: Redistribution Dynamic		✓ Format	
Votes Project/Subproject Properties General Teams Machine types Machinery Headers and footers Format Color User-defined fields Notes Conflict Unassigned resources Failed resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic		✓ User fields	
Project/Subproject Properties ✓ General ✓ Teams ✓ Machine types ✓ Machinery ✓ Headers and footers ✓ Format ✓ Color ✓ User-defined fields ✓ Notes Conflict ✓ Overallocated resources ✓ Pailed resources ✓ Itate activities Experten Parameter Task: Redistribution Dynamic		✓ Notes	
General Teams Machine types Machinery Headers and footers Format Color User-defined fields V Notes Conflict Unassigned resources V Overallocated resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic		Project/Subproject Properties	
✓ Teams ✓ Machine types ✓ Machinery ✓ Headers and footers ✓ Format ✓ Color ✓ User-defined fields ✓ Notes Conflict ✓ Unassigned resources ✓ Soverallocated resources ✓ Failed resources ✓ Late activities Experten Parameter Task: Redistribution Dynamic		General	
Machine types Machinery Machinery Headers and footers Format Color User-defined fields Notes Conflict Unassigned resources SOverallocated resources Failed resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic		✓ Teams	
Machinery Headers and footers Format Color User-defined fields Notes Conflict Unassigned resources Failed resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic		Machine types	
 ✓ Headers and footers ✓ Format ✓ Color ✓ User-defined fields ✓ Notes Conflict ✓ Unassigned resources ✓ Overallocated resources ✓ Failed resources ✓ Late activities Experten Parameter Task: Redistribution Dynamic 		Machinery	
 ✓ Format ✓ Color ✓ User-defined fields ✓ Notes Conflict ✓ Unassigned resources ✓ Overallocated resources ✓ Failed resources ✓ Late activities Experten Parameter Task: Redistribution Dynamic 		Headers and footers	
 ✓ Color ✓ User-defined fields ✓ Notes Conflict ✓ Unassigned resources ✓ Overallocated resources ✓ Failed resources ✓ Late activities Experten Parameter Task: Redistribution Dynamic 		✓ Format	
✓ User-defined fields ✓ Notes Conflict ✓ ✓ Unassigned resources ✓ Overallocated resources ✓ Failed resources ✓ Late activities Experten Parameter		Color	
✓ Notes Conflict ✓ Unassigned resources ✓ Overallocated resources ✓ Failed resources ✓ Late activities Experten Parameter Task: Redistribution Dynamic		User-defined fields	
Conflict Unassigned resources Overallocated resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic		✓ Notes	
✓ Unassigned resources ✓ Overallocated resources ✓ Failed resources ✓ Late activities Experten Parameter		Conflict	
Overallocated resources Failed resources Late activities Experten Parameter Task: Redistribution Dynamic		Unassigned resources	
 ✓ Failed resources ✓ Late activities Experten Parameter ☐ Task: Redistribution Dynamic 		Overallocated resources	
✓ Late activities Experten Parameter □ □ Task: Redistribution Dynamic		Failed resources	
Experten Parameter Task: Redistribution Dynamic		Late activities	
Task: Redistribution Dynamic		Experten Parameter	
		Task: Redistribution Dynamic	

You can change the settings which tab pages in the following areas should be represented.

- View Select the views from the list to be displayed.
- Activity properties From the list select the activity properties that you want to appear as tabs at the top of the activity properties window.
- **Project/Subproject's properties** From this list select the project/subproject properties that you want to appear as a tab in the upper pane of the project properties window.

11.5 Customize Ribbon

Options				×
General	Choose commands from:		Customize the Ribbon:	
Display	Popular Commands -		Main Tabs 🔹	
Extended	C		Maia Taba	
Customize Ribbon	Open portfolio			
Quick Access Toolbar	 Copen portfolio Restore Save Save as Undo 	Add >>	 Activity views Activity views Gantt chart Variance anlysis Gantt-network chart Resource views Employee usage Role usage Role usage Machine types usage Machine types usage Machine usage Material requirements Capacity views Material requirements Capacity views Machine capacity planning Additional view User views Properties Schedule Insert Outline Edit Scrolling Ø PROJECT Schedule Latest possible start date set Other functions image Wove delayed activities on the position server Assistant Baseline Project resources Project settings Integration server	
			New Tab New Group Rename	
	Keyboard shortcuts: Customize		Customizations: Reset	
OK Abbrechen				

You can customize the Ribbon according to your requirements, e.g. create custom tabs and groups that contain commonly used commands.

11.6 Quick Access Toolbar

Options				×
General	Choose commands from:			
Display	Popular Commands	1	Conen	
Extended	Commande:	1	Save	
Customize Ribbon	<separator></separator>		S Rückgängig	
Quick Access Toolbar	Open		C Wiederherstellen	
2	Open portfolio		ach Excel exportieren	
	S Rückgängig			
	E Save	<u>A</u> dd > >		A
	Save as			
	Wiederherstellen	< < <u>R</u> emove		-
			Keset	
	Show Quick Access Toolbar below the Ri	bbon		
	Keyboard shortcuts: Customize			
			OK Ab	brechen

You can customize the Quick Access toolbar at two different positions, for example, below or above of the Ribbon place, as well as add buttons to it, that are representing the commands. Only commands can be added to the Quick Access Toolbar.

CHAPTER

TWELVE

INDICES

• genindex

• search

INDEX

\spxentryActivities properties, 48 \spxentryAdd baseline, 289 \spxentryAdditional cost chart, 261 \spxentryAdditional gantt chart, 263 \spxentryAdditional resource chart, 260 \spxentryAdjust timescale and calendar pane, 91 \spxentryAdjustments of the program environment, 303 \spxentryAllocate machine types, 57 \spxentryAllocate machinery, 58 \spxentryAllocate material, 55 \spxentryarchive summary project, 88 \spxentryAssign activities to a machine type in Machine types, 167 \spxentryAssign activities to a material in the view Material requirements, 163 \spxentryAssign activities to a role in the view Role, 145 \spxentryAssign activities to a team in the view Team, 150 \spxentryAssign activities to an employee in the Human resource capacity planning, 155 \spxentryAssign activities to an employee in the view Employee, 157 \spxentryAssign activities to machines in the view Machine usage, 171 \spxentryAssign activities to subprojects, 79 \spxentryAssign employees, 52 \spxentryAssign employees to activities, 177 \spxentryAssign resources, 143 \spxentryAssign roles, 51 \spxentryAssigning External Documents to a Project, 37 \spxentryAutomatically assign machine park to activities, 182 \spxentryAutomatically assign resources, 177 \spxentrybar chart, 253 \spxentrybaseline, 289 \spxentryCapacity alignment personnel percentage, 242 \spxentrycapacity oriented planning, 11 \spxentrycapacity views, 253 \spxentryChange order in the Gantt charts, 91 \spxentryCheck links, 60 \spxentryColor and Size of the different objectsm Change font and font size, 306

\spxentrycolor in the project, 18 \spxentryControl of project financing, 293 \spxentryCopy properties from workplace, 24 \spxentrycreate a summary project in Rillsoft with an interface to the Rillsoft Integration Server, 86 \spxentryCreate activities, 38 \spxentryCreate new project, 7 \spxentryCreate new resource pool file, 116 \spxentryCreate resources, 115 \spxentryCreate subproject, 72 \spxentryCreate user-defined fields, 19 \spxentryCross-project links, 281 \spxentryCross-project links in summary project, 88 \spxentryCross-project links in the portfolio, 36 \spxentryCustomize program environment, 303 \spxentryCustomize Ribbon, 310

\spxentryDefault location, 304 \spxentryDefault parametrs for new activity, 304 \spxentryDefine color, 18 \spxentryDefine format, 18, 61 \spxentryDefine general activity properties, 50 \spxentryDefine header and footer, 17 \spxentryDefine machine types that can be shared, 13 \spxentryDefine machinery that can be shared, 15 \spxentrydefine project properties, 11 \spxentryDelete activities, 41 \spxentryDelete baselines, 291 \spxentryDelete link, 47 \spxentryDelete subprojects, 78 \spxentryDisplay, 306 \spxentryDMS in Project, 21 \spxentryDMS in tasks, 64 \spxentryDocument Management System, 21 \spxentrydocument management system, 64 \spxentrydue date oriented planning, 11

\spxentrydynamic baseline, 290

\spxentryEdit activities, 39
\spxentryEdit link, 47
\spxentryEdit subprojects, 77
\spxentryEmployee View Resource Properties, 160
\spxentryEmployee workload, 235

\spxentryEmployee workload with an additional Gantt \spxentryMachine capacity planning with additional rechart. 237 \spxentryEnter activity properties, 48 \spxentryEnter notes & links, 20, 63 \spxentryEnter subproject properties, 79 \spxentryExport, 103, 104, 111, 114 \spxentryExport MS Outlook, 111 \spxentryExport MS Project, 104 \spxentryExport to MS Excel, 106 \spxentryExport to MS Outlook, 111 \spxentryExport to MS Project, 104 \spxentryExport XML for Web, 114 \spxentryExtended, 304

\spxentryFailed resource, 31 \spxentryFill in user-defined fields, 62 \spxentryFilter, 264 \spxentryformat views, 253 \spxentryFree text filter, 268

\spxentryGantt chart, 207, 253 \spxentryGantt-network chart, 223 \spxentryGeneral, 304

\spxentryhours worked, 239 \spxentryHuman Resource Capacity Leveling, 241 \spxentryHuman Resource Capacity Leveling with additional resource chart, 246 \spxentryHuman Resource Capacity Leveling with an additional Gantt chart, 243 \spxentryIdentify machine types from machine allocation, 188 \spxentryIdentify resources, 115 \spxentryIdentify roles from the employees assignation, 187 \spxentryImport, 99 \spxentryImport from MS Project XML, 100 \spxentryImport of the resource pool from resource pool file in Rillsoft Integration Server, 119 \spxentryImport text file CSV format, 101 \spxentryImprove presentation of the project, 91 \spxentryIn machine types machine type properties, 170 \spxentryInconsistent resources, 34 \spxentryInsert subprojects from file, 73 \spxentryInsert subprojects from Rillsoft Integration Server template, 75 \spxentryIntroduction, 3 \spxentryLate activities, 29 \spxentryLegal notice, 1 \spxentryLink activities, 44 \spxentryMachine capacity planning, 251

source chart, 252 \spxentryMachine types, 248 \spxentryMachinery properties, 174 \spxentryMachinery use, 249 \spxentryManual selection of calendar, 191 \spxentryManual selection of employees, 195 \spxentryManual selection of machine types, 197 \spxentryManual selection of machinery, 199 \spxentryManual selection of materials, 196 \spxentryManual selection of project category, 200 \spxentryManual selection of project status, 201 \spxentryManual selection of roles, 192 \spxentryManual selection of teams, 194 \spxentryMaterial, 247 \spxentryMaterial requirement Properties, 166 \spxentrymixed allocated resources, 34 \spxentryMulti-user environment summary project, 85 \spxentryMultiuser Environment Portfolio, 279 \spxentryMultiuser Environment project, 9 \spxentryMultiuser Environment Resource Pool, 143

\spxentryNetwork diagram, 220 \spxentryNew project, 7 \spxentryNew project from template, 8 \spxentryNew Project Portfolio, 272 \spxentryNew project portfolio, 270 \spxentryNew Project Portfolio in Rillsoft with Interface to the Rillsoft Integration Server, 272 \spxentrynew resource pool, 117 \spxentrynew resource pool in Rillsoft with interface to Rillsoft Integration Server, 117 \spxentryNew summary project in Rillsoft with interface to Rillsoft Integration Server, 81 \spxentryNumber all activities and subprojects, 91

\spxentryOpen a project portfolio, 274 \spxentryOpen a project portfolio in Rillsoft with interface to Rillsoft Integration Server, 276 \spxentryOpen project, 8 \spxentryOpen summary project, 88 \spxentryOptimize a project, 95 \spxentryOverallocated resources, 30 \spxentrypartially assigned resources, 34 \spxentryPortfolio dashboard, 36 \spxentryPortfolio overview, 29 \spxentryPreferred teams, 13 \spxentryPrint holiday report, 300

\spxentryPrint preview, 298 \spxentryPrint view, 299 \spxentryPrinting, 297 \spxentrypriority, 11 \spxentryproject calendar, 11 \spxentryproject categories, 11 \spxentryProject controlling, 285
\spxentryProject documents, 28
\spxentryProject information, 29
\spxentryProject management, 295
\spxentryProject overview, 35
\spxentryProject protfolio, 269
\spxentryProject properties, 11
\spxentryProject status, 11
\spxentryProject views, 205
\spxentryProject-specific employee workload, 238
\spxentryProject-specific role usage, 231
\spxentryProject-specific team, 234

\spxentryQuick Access Toolbar, 311

\spxentryRelative capacity requirements employees percent, 242 \spxentryReload portfolio, 279 \spxentryReload project, 9 \spxentryReload summary project, 85 \spxentryRemove employees from activities, 181 \spxentryRemove machinery from activities, 185 \spxentryResource allocation, 143 \spxentryResource management, 115 \spxentryResource utilization, 175 \spxentryresource views, 253 \spxentryRillsoft Integration Server, 304 \spxentryRole, 225, 228 \spxentryRole usage and Full Time Equivalent, 228 \spxentryRole usage with effort, 228 \spxentryRole View Resource Properties, 148 \spxentryRoles, 228

\spxentrySave header and footer, 26 \spxentrySave project, 97 \spxentrySave project as template, 98 \spxentrySave properties, 24 \spxentrySave properties in the workplace, 23 \spxentrySave user view, 27 \spxentrySearch, 268 \spxentrySelect baseline, 289 \spxentryselect baseline, 11 \spxentrySelect other resource pool, 122 \spxentrySet and adjust calendars, 123 \spxentrySet and adjust employees, 129 \spxentrySet and adjust machine types, 135 \spxentrySet and adjust machinery, 137 \spxentrySet and adjust materials, 133 \spxentrySet and adjust project categories, 139 \spxentrySet and adjust project customers, 142 \spxentrySet and adjust project status, 141 \spxentrySet and adjust roles, 125

\spxentrySet and adjust teams, 126 \spxentrySettings for project and programme, 23 \spxentrySettings for project with Rillsoft Integration Server. 24 \spxentryShift to resource pool, 190 \spxentrySplit activities, 66 \spxentrySplit activities into places / subproject, 69 \spxentrysplit the project., 86 \spxentrySubprojects, 72 \spxentrySubprojects activities associate, 72 \spxentrySummary project, 80 \spxentrySummary project open, 86 \spxentrysummary project open, 83 \spxentrysummary project open in Rillsoft with interface to Rillsoft Integration Server, 83 \spxentrysummary project properties, 81 \spxentrySynchronize resources of projects witch resource pool, 190

\spxentryTake over start and finish dates of a project from activities, 91 \spxentrytarget/actual comparison, 253 \spxentryTeam, 232 \spxentryTeam View Resource Properties, 153 \spxentryTimesheet, 55 \spxentryTimesheets, 239

\spxentryUnassigned resources, 33 \spxentryUpdate resource pool, 143 \spxentryUser views, 259

\spxentryVariance analysis, 210, 291
\spxentryVariance analysis activity properties, 214
\spxentryVariance analysis cost, 213
\spxentryVariance analysis effort, 212
\spxentryVariance analysis of subproject properties, 217
\spxentryVariance analysis time, 211
\spxentryviews, 205
\spxentryViews customization, 309

\spxentryWork with Project, 7 \spxentrywork with summary project, 80 \spxentryWorking in networks, 5 \spxentryworking times, 55 \spxentryWorking with activity and subproject tables, 41