

## 6.7 Projects



The “Projects” Module in FoxSuite allows users to create, manage, and report on any number of projects. When users first enter the Projects Module, they are presented a list of active projects (if any) they had either previously created or have been given access to.

| Return                                    |      | Projects for: Jim H Smith |             |                |            | Select Business |                 | Select Location |      |      |     |  |
|---|------|---------------------------|-------------|----------------|------------|-----------------|-----------------|-----------------|------|------|-----|--|
|   |      | Add Project               |             | My Assignments |            | Energy          |                 | Alvin           |      |      |     |  |
| Project Name                              | Info | Business                  | Location    | Project Mgr    | Budget     |                 | Sch. Completion |                 | Comp | Edit | Del |  |
|   |      |                           |             |                | Authorized | Forecast        | Original        | Forecast        |      |      |     |  |
| <a href="#">Big Project</a>               |      | Software                  | Austin      | Ken Wilson     | \$9500000  | \$9000000       | 3/1/2006        | 3/1/2006        |      |      |     |  |
| <a href="#">New Electrical Substation</a> |      | Software                  | Houston     | Bob H Tuna     | \$2000000  | \$1900000       | 9/1/2006        | 9/1/2006        |      |      |     |  |
| <a href="#">HTML Projects</a>             |      | Energy                    | Katy        |                | \$0        | \$0             | 10/11/2005      | 10/11/2005      |      |      |     |  |
| <a href="#">Second HTML</a>               |      | Energy                    | Freeport    |                | \$0        | \$0             | 10/11/2005      | 10/11/2005      |      |      |     |  |
| <a href="#">Secret Projects</a>           |      | Energy                    | New Orleans |                | \$0        | \$0             | 10/18/2005      | 10/18/2005      |      |      |     |  |

From this project list panel, users may then access project details, create new projects, edit existing projects or view the project archives. Projects may also be sorted by Location and Business Unit. Let’s first look at creating a new project.

### 6.7.1 Creating a new Project

To create a new project the user would click the **Add Project** button on the screen shown above. The new project entry screen would appear as shown below.

Return
**New Project Entry**

**Project Name:**

**Client:**

**Project # or ID:**  **Proj. Mgr:**

**Business:**  **Location:**

**Project Objective:**

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**Budget Data**

Total Budget:

Total Expended:

Total Committed:

Forecast Cost:

Dollar Limit:

**Schedule Data**

Original Start Date:

Actual Start Date:

Original Completion:

Forecast Completion:

**Project Highlights:**

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When a user creates a new project, that user is designated as the project “owner”. This is done by recording their Member ID number in the project record. Project

owners can choose to reserve viewing of the project for themselves only, or can create a project participant list of other users with viewing privileges.

To grant project viewing privileges, the project owner would click the Project Name on the project list panel to bring up the Project Details page shown below:

| Project Details  |   |                                     |                       |                             |                                      |                               |                              |                               |                                 |                       |
|--|---|-------------------------------------|-----------------------|-----------------------------|--------------------------------------|-------------------------------|------------------------------|-------------------------------|---------------------------------|-----------------------|
| <a href="#">Return</a>                                     |   | <a href="#">Select Participants</a> | <a href="#">Chart</a> | <a href="#">Add Phase</a>   | <a href="#">Project Calendar</a>     | <a href="#">Project Forum</a> | <a href="#">Edit Project</a> | <a href="#">Project Files</a> | <a href="#">Project Gallery</a> | <a href="#">Print</a> |
| <b>Project Name:</b> <b>New Electrical Substation</b>      |   | <a href="#">Team Roster</a>         |                       |                             | <a href="#">Email Project Team</a>   |                               |                              |                               |                                 |                       |
| <b>Client:</b>   | Acme Chemical   |                                     |                       | <b>Project Owner:</b>       | Jim H Smith                          |                               |                              |                               |                                 |                       |
| <b>Project Number:</b>                                     | A54-b12   |                                     |                       | <b>PM:</b>                  | Bob H Tuna                           |                               |                              |                               |                                 |                       |
| <b>Business:</b>   | Software  |                                     |                       | <b>Location:</b>            | Houston                              |                               |                              |                               |                                 |                       |
| <b>Objective:</b>  | A new electrical substation in block 12 of the tank farm. |                                     |                       |                             |                                      |                               |                              |                               |                                 |                       |
| <b>Highlights:</b>   | Kickoff Meeting will be held on 8/15/05                   |                                     |                       |                             |                                      |                               |                              |                               |                                 |                       |
| <b>Percent Complete:</b>                                   | 30  |                                     |                       |                             |                                      |                               |                              |                               |                                 |                       |
| <b>Budget Performance: 95.00%</b>                          |   |                                     |                       |                             | <b>Schedule Performance: 100.00%</b> |                               |                              |                               |                                 |                       |
| <b>Original Budget:</b>                                    | \$2000000   |                                     |                       | <b>Original Start Date:</b> | 8/15/2005                            |                               |                              |                               |                                 |                       |
| <b>Expended-to-date:</b>                                   | \$12000   |                                     |                       | <b>Actual Start Date:</b>   | 8/15/2005                            |                               |                              |                               |                                 |                       |
| <b>Committed-to-date:</b>                                  | \$50000   |                                     |                       | <b>Original Completion:</b> | 9/1/2006                             |                               |                              |                               |                                 |                       |
| <b>Forecast Final Cost:</b>                                | \$1900000   |                                     |                       | <b>Forecast Completion:</b> | 9/1/2006                             |                               |                              |                               |                                 |                       |
| <b>Dollar Limit:</b>                                       | \$2100000   |                                     |                       |                             |                                      |                               |                              |                               |                                 |                       |
| <a href="#">Show Activities</a>                            |   |                                     |                       |                             |                                      |                               |                              |                               |                                 |                       |
| <b>Project Phases</b>                                      | <b>Start Date</b>   | <b>End Date</b>                     | <b>Leader</b>         | <b>% Complete</b>           | <b>Edit</b>                          | <b>Delete</b>                 |                              |                               |                                 |                       |
| <a href="#">Define Project Objectives and Requirements</a> | 8/15/2005   | 9/15/2005                           | Blog r Guy            | 0                           |                                      |                               |                              |                               |                                 |                       |
| <a href="#">sgsdgsd</a>                                    | 8/26/2005   | 8/30/2005                           | Jim H Smith           | 40                          |                                      |                               |                              |                               |                                 |                       |
| <a href="#">Prepare Equipment Specifications</a>           | 9/19/2005   | 10/21/2005                          | Jim H Smith           | 10                          |                                      |                               |                              |                               |                                 |                       |
| <a href="#">Test Phase</a>                                 | 10/19/2005  | 11/24/2005                          |                       | 25                          |                                      |                               |                              |                               |                                 |                       |
| < >  |   |                                     |                       |                             |                                      |                               |                              |                               |                                 |                       |

At the top of this page there is a Menu bar. The first menu item is “Select Participants”. Project Owners can use this menu item to select new project participants from the FoxSuite Members Directory. Project participants added this way will thereafter see this project on their project list, and can access and edit project data according to their normal FoxSuite security rating.

### 6.7.2 Adding / Editing Project Phases

In FoxSuite, the overall project model is one of Project Phases and Project Activities as shown below.

#### Project ABC

- **Phase 1**
  - **Activity 1**
  - **Activity 2**
  - **Activity 3**
- **Phase2**
  - **Activity 1**
  - **Activity 2**
  - **Activity 3**

Users can add and edit any number of Project Phases using the Project Detail Page Menu Bar. **Phases** are sub-portions of projects which can have leaders, budgets, and schedules of their own. Project Phases also make up the elements of the Project Schedule Chart which can also be clicked on the Project Menu Bar.

**New Project Phase**

Project Name: **New Electrical Substation** 8/15/2005 - 9/1/2006

Phase Name: \*

Start Date: \* End Date: \*

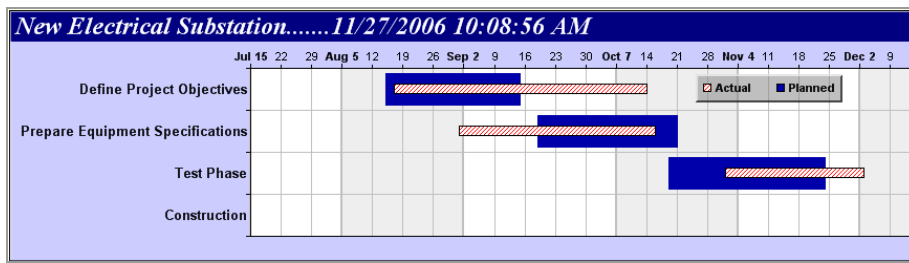
Total Budget: 0 Expended: 0

Hours: 0 Percent Comp: \* 0

Phase Leader:

Notes: (250 chars)

**Submit**



### 6.7.3 Adding / Editing Project Activities

Project Activities are the detailed work activities which make up Project Phases. Activities are sub-portions of Project Phases, and can have leaders, budgets, and schedules of their own.

**New Project Activity**

Project Name: **New Electrical Substation**

Phase Name: **Define Project Objectives and Requirements ----- 8/15/2005 to 9/15/2005**

Activity Name: \*

Start Date: \* End Date: \*

Total Budget: 0 Expended: 0

Hours: 0 Percent Comp: \* 0

Activity Leader:

Notes: (250 chars)

**Submit**

## 6.7.4 Editing Project Data

From the same Menu bar mentioned above, users can edit project data using the **Edit Project** button to bring up the screen shown below.

**Edit Project**

**Project Name:** New Electrical Substation

**Client:** Acme Chemical

**Project #:** A54-b12      **Project Manager:** Bob H Tuna

**Business:** Energy      **Project Owner:** Jim H Smith

**Location:** Freeport      **Percent Complete:** 30

**Objective**

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A new electrical substation in block 12 of the tank farm.

| Budget Information |         | Schedule Information   |   |
|--------------------|---------|------------------------|---|
| Original Budget:   | 2000000 | Original Start Date:   | 8/15/2005   |
| Expended to Date:  | 12000   | Actual Start Date:     | 8/15/2005   |
| Committed to Date: | 50000   | Original Completion:   | 9/1/2006  |
| Forecast Cost:     | 1900000 | Forecast Completion:   | 9/1/2006  |
| Limit:             | 2100000 | Tag Project Complete ? | <input checked="" type="radio"/> No <input type="radio"/> Yes |

**Highlights**

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Kickoff Meeting will be held on 8/15/05

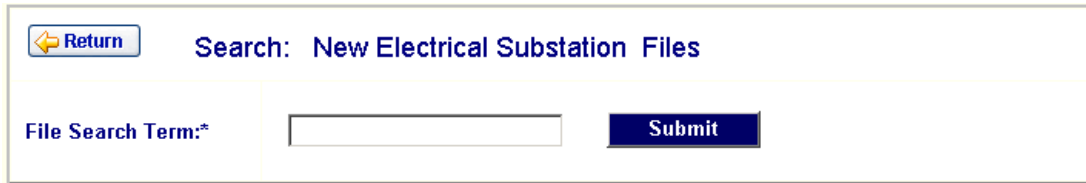
**Update**

## 6.7.5 Project Notes and Comments

Notes / Comments can be added to each project as a means of recording special information or to enhance communications. New comments are added above older comments to form a sort of “log” with the date, time, and contributors name recorded for project history.




Project Files can be “searched” using the Search button to bring up the file search term box.

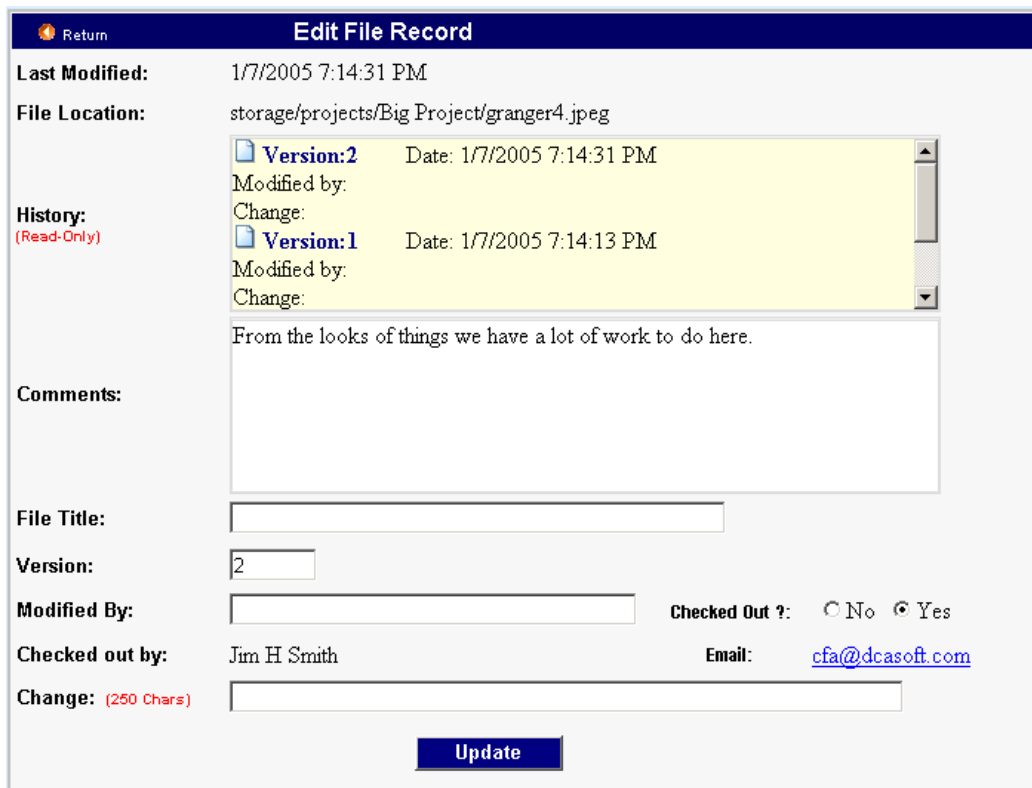


Return Search: New Electrical Substation Files

File Search Term:\*  Submit

## File Versions, History, and Comments

Over time, files tend to be updated and revised by users. Procedures are updated and forms change. FoxSuite provides a mechanism to help track these changes by recording when changes occur, who made them, and a short description of what was changed. When a project file must be updated– the user can select the Edit  icon on that file’s line. The red **Profile** button can then be clicked to bring up the screen shown below.



Return Edit File Record

Last Modified: 1/7/2005 7:14:31 PM

File Location: storage/projects/Big Project/granger4.jpeg

History: (Read-Only)

- Version:2 Date: 1/7/2005 7:14:31 PM  
Modified by:  
Change:
- Version:1 Date: 1/7/2005 7:14:13 PM  
Modified by:  
Change:

Comments: From the looks of things we have a lot of work to do here.

File Title:

Version:

Modified By:

Checked Out ? :  No  Yes

Checked out by: Jim H Smith Email: [cfa@dcasoft.com](mailto:cfa@dcasoft.com)

Change: (250 Chars)

Update

The user can now edit this information, add information relevant to the current changes, add comments/notes, and change the version number. This new information will be recorded in the file’s new profile and history/comment fields.

- **Project File Security** ⚠ As discussed in Section 4.0 and 4.4 - project file storage is not covered by normal FoxSuite security – but instead must be covered by the security features of the IIS webserver, and the Windows Operating System itself. Project files are stored in the FoxSuite **Storage/Projects** folder. To avoid an unauthorized person typing a project file address into their browser address window – administrators should **disable Read Access** in IIS for the **Storage/Projects** folder.

### 6.7.7 Project Administrators

Project Access was discussed above – but there is one additional feature concerning project access to be considered – **Project Administrators**. Project Administrators are FoxSuite users with permissions to “view” all projects within FoxSuite. Normally Project Owners have complete control over who can access their project information, but Project Administrators have view-only rights over all projects. A Project Administrator might be a managerial level person who needs to manage overall project activities – but is not necessarily a member of any individual project team. Project Administrator permission is granted as part of a person’s Member Directory profile. Designating a person as a Project Administrator avoids requiring Project Owners having to grant them specific access to each individual project.

|                         |   |
|-------------------------|---|
| Background              |   |
| 250 Chars.              |   |
| Share My Calendar ?     | <input checked="" type="radio"/> No <input type="radio"/> Yes |
| Can View All Projects ? | <input checked="" type="radio"/> No <input type="radio"/> Yes |

### 6.7.8 Project Forum


A dedicated Project Forum (Discussion Board) is created for each project and can be used by participants to record discussions of project matters.

### 6.7.9 Project Calendar

A dedicated Project Calendar is created for each project and can be used by participants to schedule project meetings and activities.

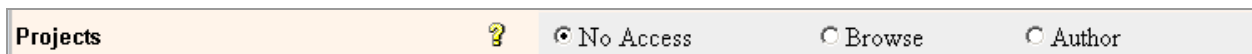
### 6.7.10 Project Archives

When a project is completed – the Project Owner or Manager may want to designate the project as “complete” using the Project Edit Function. Declaring a project as complete removes the project from the “active” project listings, but places the project in the Project Archive. Placing the project in the Archive

preserves the project record, as opposed to deleting the project which removes the record from the database. Each individual may view their archive projects by clicking the  button on their project listing. They will see a list of completed projects that they either “own” or have been granted access to.

### **6.7.11 Member Security Settings:**

For new Members, the Projects module has 3 overall levels of Access Permissions as shown below:



These 3 choices can be further defined in terms of the starting named security profiles, and their allowable actions as shown in the chart below:

| <b>Advanced Security</b> | <b>No Access</b> | <b>Browse</b> | <b>Author</b>               |   |   |
|--------------------------|------------------|---------------|-----------------------------|---|---|
| <b>Basic Security</b>    | <b>Guest</b>     | <b>Basic</b>  | <b>Advanced &amp; Admin</b> |   |   |
| View Projects List       |                  | ✓             | ✓                           | ✓ | ✓ |
| View Project Details     |                  | ✓             | ✓                           | ✓ | ✓ |
| Sort Projects            |                  | ✓             | ✓                           | ✓ | ✓ |
| Add Project Access       |                  |               | ✓                           | ✓ | ✓ |
| Delete Project Access    |                  |               | ✓                           | ✓ | ✓ |
| Add Business Area        |                  |               | ✓                           | ✓ | ✓ |
| Delete Business Area     |                  |               | ✓                           | ✓ | ✓ |
| Add Location             |                  |               | ✓                           | ✓ | ✓ |
| Delete Location          |                  |               | ✓                           | ✓ | ✓ |
| Add Project              |                  |               | ✓                           | ✓ | ✓ |
| Edit Project             |                  |               | ✓                           | ✓ | ✓ |
| Delete Project           |                  |               | ✓                           | ✓ | ✓ |
| Upload Project Files     |                  |               | ✓                           | ✓ | ✓ |
| View Project Files       |                  |               | ✓                           | ✓ | ✓ |