

4.12 Projects



The “Projects” Module in Denali 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.

Projects for: Jim H Smith											
Return	Select Business						Select Location				
	Energy						Submit				
	Freeport						Submit				
All Projects Add Project My Assignments Project Archive Summary Charts											
Project Name	Info	Business	Location	Project Mgr	Budget		Sch. Completion		Comp	Edit	Delete
					Authorized	Forecast	Original	Forecast			
Build Computer		Energy	Freeport		\$3400	\$3000	1/31/2008	1/31/2008			
test case		- Make Selection -	- Make Selection -		\$67	\$89	1/16/2008	1/16/2008			
My Big Test		- Make Selection -	- Make Selection -		\$0	\$0	7/31/2008	7/30/2008			
Test project with no dates		- Make Selection -	- Make Selection -		\$0	\$0	1/1/2001	1/1/2001			
Test project with dates		- Make Selection -	- Make Selection -		\$0	\$0	4/30/2008	1/1/2001			
Test Project 7		Energy	Freeport	Jim H Smith	\$500000	\$496000	1/1/2001	7/31/2008			
Land Dev		Land	Freeport		\$0	\$0	1/1/2001	1/1/2001			
Project Test 1		- Make Selection -	- Make Selection -		\$0	\$0	2/22/2008	2/22/2008			
Project Test 2		- Make Selection -	- Make Selection -		\$0	\$0	4/25/2008	5/28/2008			

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.

4.12.1 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: **Project Mgr:**

Business: **Location:**

Project Objective:

Default Font Size **B I U**

Budget Data

Total Budget:

Total Expended:

Total Committed:

Forecast Cost:

Schedule Data

Original Start Date:

Actual Start Date:

Original Completion:

Forecast Completion:

Project Highlights:

Default Font Size **B I U**

Submit

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: Grassroots Ethanol Facility

Project Name: **Grassroots Ethanol Facility**

Client: Acme Chemical Company Project Owner: Jim H Smith

Project Number: A345 PM: Bob H Simpson

Business: - Make Selection - Location: - Make Selection -

Objective:

Highlights:

Percent Complete: 0

Budget Performance: 98.33% **Schedule Performance: 100.00%**

Original Budget:	\$120000000	Original Start Date:	8/13/2008
Expended-to-date:	\$900000	Actual Start Date:	8/13/2008
Committed-to-date:	\$1400000	Original Completion:	11/30/2009
Forecast Final Cost:	\$118000000	Forecast Completion:	11/30/2009

Project Phases	Start Date	End Date	Leader	% Complete	Edit	Delete
Site Evaluation and Selection	8/25/2008	9/17/2008	Jim H Smith	5	[Edit]	[Delete]
Preliminary Engineering Studies	9/22/2008	10/14/2008	Bob H Simpson	10	[Edit]	[Delete]
Process Design	9/30/2008	10/31/2008	Bob H Simpson	0	[Edit]	[Delete]
Detailed Design	11/24/2008	2/28/2009		0	[Edit]	[Delete]
Construction	2/23/2009	8/28/2009		0	[Edit]	[Delete]
Startup	9/1/2009	11/16/2009		0	[Edit]	[Delete]

Ready

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 Denali 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 Denali security rating.

4.12.2 Adding / Editing Project Phases

In Denali, 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
- Phase 2
 - 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.

[Return](#) **New Project Phase**

Project Name: Grass Roots Ethanol Plant **8/1/2008 - 8/29/2008**

Phase Name: *

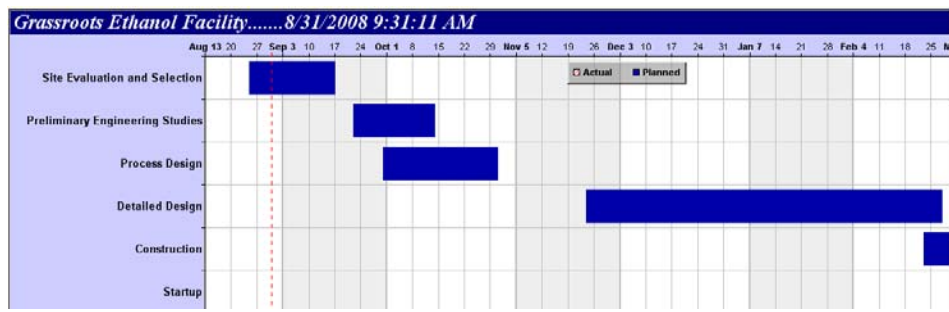
Start Date: * **End Date: ***

Phase Budget: **Expended:**

Hours: **Percent Comp: ***

Phase Leader:

Notes: (400 chars)



4.12.3 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.

[Return](#) **New Project Activity**

Project Name: Grass Roots Ethanol Plant

Phase Name: Phase 1 ----- 8/18/2008 to 8/14/2008

Activity Name: *

Start Date: * **End Date: ***

Total Budget: **Expended:**

Hours: **Percent Comp: ***

Activity Leader:

Notes: (400 chars)

4.12.4 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.

[Return](#) **Edit Project** [Update](#)

Project Name **Grass Roots Ethanol Plant**

Client

Project # **Project Manager**

Business Energy **Project Owner** Jim H Smith

Location Freeport **Percent Complete** 0

Objective

Times New Roman Size **B** *I* U

wtwetwetwe

Budget Information		Schedule Information	
Original Budget:	<input type="text" value="\$0"/>	Original Start Date:	<input type="text" value="8/1/2008"/>
Expended to Date:	<input type="text" value="\$0"/>	Actual Start Date:	<input type="text" value="8/1/2008"/>
Committed to Date:	<input type="text" value="\$0"/>	Original Completion:	<input type="text" value="8/1/2008"/>
Forecast Cost:	<input type="text" value="\$0"/>	Forecast Completion:	<input type="text" value="8/29/2008"/>

Tag Project Complete ? No Yes

Highlights

Times New Roman Size **B** *I* U

Comments

Times New Roman Size **B** *I* U

4.12.5 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.

[Return](#) **Read / Add Project Comments**

Comments By: Jim H Smith

File Title: Grass Roots Ethanol Plant

Default Font Size **B** *I* U

Arial Size

B *I* U

[Submit](#)

4.12.6 Project Files

When a new project is created, a project folder with the project name is also created in the Denali **Storage/Projects** folder. Project documents can then be uploaded to this folder using the Upload Menu bar item on the Project Details page. The project folder and documents are kept separate from the public **docs** files, and are designated for viewing only by the project owner and project participants. Project Files are accessed with the Project Files Menu bar item on the Project Details page.

Folder Name	Size Kb	Date Created	Upload	Rename	Delete	
..						
images	457	8/26/2006				
Purchasing	232	8/26/2006				
vti_cnf	3	12/5/2006				
File Name	Edit	Email	Date Created	Type	Last Modified	Size (Bytes)
4.bmp			8/26/2006	bmp	10/8/2005	77,878
45v.htm			8/26/2006	htm	1/7/2006	38
5.gif			8/26/2006	gif	12/6/2006	1,734
6.gif			8/26/2006	gif	12/6/2006	1,205
7.gif			8/26/2006	gif	12/6/2006	1,240
8.gif			8/26/2006	gif	12/6/2006	1,240
9.gif			8/26/2006	gif	12/6/2006	1,679
address.gif			8/26/2006	gif	12/6/2006	251
fghdfgjd.htm			8/26/2006	htm	10/11/2005	45
plans.htm			8/26/2006	htm	10/28/2005	42
test.3.htm			8/26/2006	htm	10/14/2005	0

● Create New Directory Name:

● Create New File

● Upload File

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

Search: New Electrical Substation Files

File Search Term:*

File Versions, History, and Comments

Over time, files tend to be updated and revised by users. Procedures are updated and forms change. Denali 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

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:

History:
(Read-Only)

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

Comments:

File Title:

Version:

Modified By: **Checked Out ?:** No Yes

Checked out by: Jim H Smith **Email:** cfa@dcasoft.com

Change: (250 Chars)

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 Denali 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 Denali **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.

4.12.7 Project Administrators


Project Access was discussed above – but there is one additional feature concerning project access to be considered – **Project Administrators**. Project Administrators are Denali users with permissions to “view” all projects within Denali. 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

4.12.8 Project Calendar


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

4.12.9 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.


4.12.10 Copying a Project:

Users can create a copy of a current project for use a “template” for a new project. The copy will have the same structure (phases and activities) as the current project - saving the user the time involved in re-creating these project elements. The user will still have to edit the “cloned” project’s specific budget, schedule, and assignment items, but project copies can still be a time saver.

To copy a project just go into the project and click the Copy Project  button.

4.12.11 Member Security Settings:

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

Projects		<input checked="" type="radio"/> No Access	<input type="radio"/> Browse	<input type="radio"/> Author
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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:

12) Projects					
Access Permissions	No Access	Browse	Author		
Profile Name	Guest	Assoc, Basic	Advanced & Admin		
View Projects List	0	✓	✓	✓	✓
View Project Details		✓	1	✓	✓
Sort Projects		✓		✓	✓
Add Project Access			✓	✓	✓
Delete Project Access			✓	✓	✓
Add Business Area			✓	✓	✓
Delete Business Area			✓	✓	✓
Add Location			✓	✓	✓
Delete Location			✓	✓	✓
Add Project			✓	✓	✓
Edit Project / Add Comments			✓	✓	✓
Delete Project			✓	✓	✓
Upload Project Files			✓	✓	✓
View Project Files			✓	✓	2