

MyriadApp

**On-Demand Business
Applications**

How to manage your projects



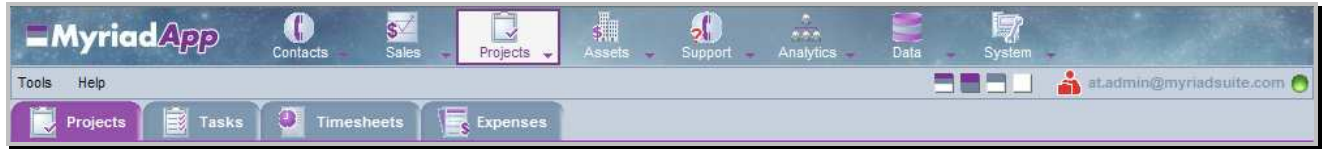
Projects Management

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How to Create a Project

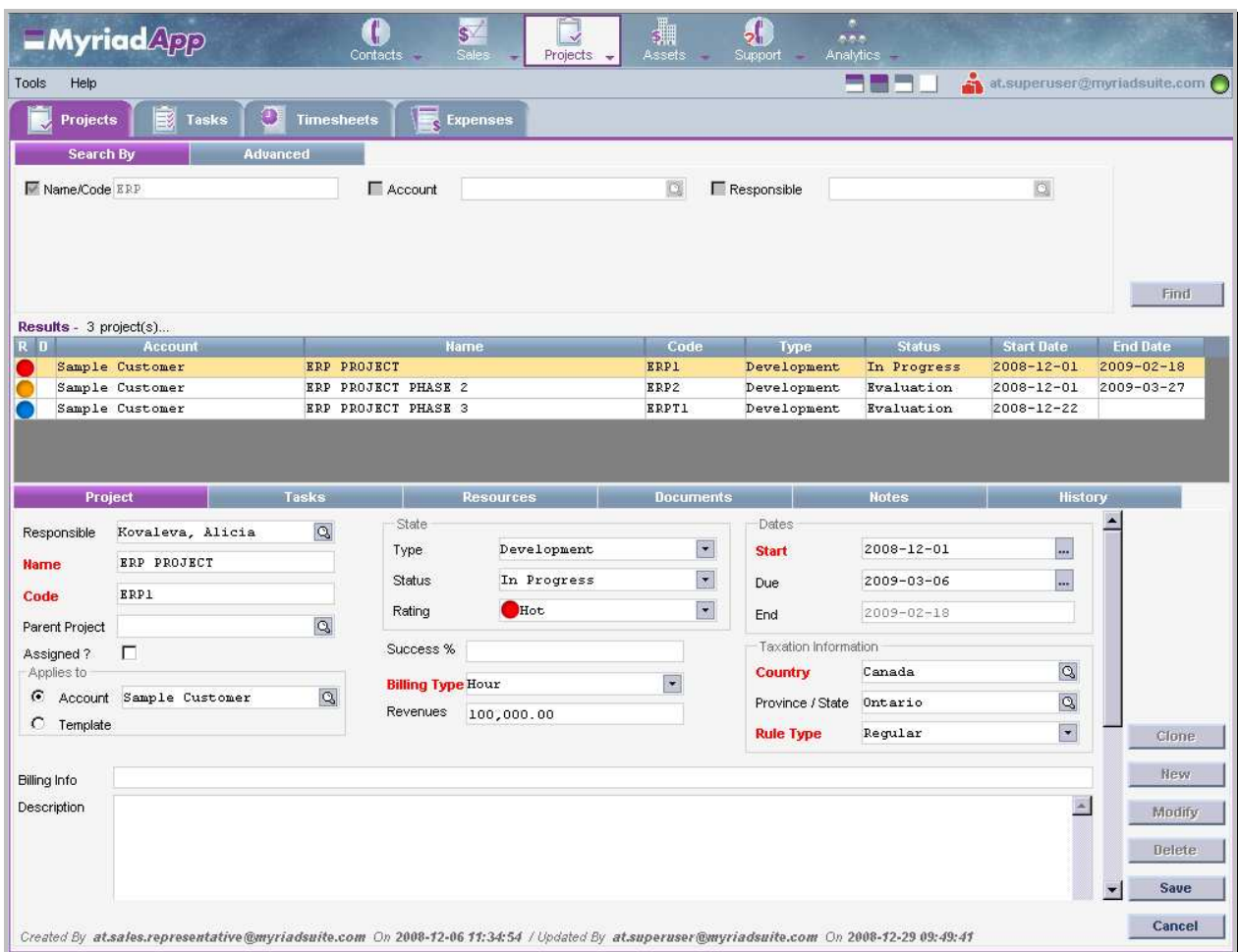
Go to Projects application



Description

Select Projects process and then Projects application.

Create a project



Search By **Advanced**

Name/Code ERP Account Responsible

Find

Results - 3 project(s)...

R	ID	Account	Name	Code	Type	Status	Start Date	End Date
●		Sample Customer	ERP PROJECT	ERP1	Development	In Progress	2008-12-01	2009-02-18
●		Sample Customer	ERP PROJECT PHASE 2	ERP2	Development	Evaluation	2008-12-01	2009-03-27
●		Sample Customer	ERP PROJECT PHASE 3	ERPT1	Development	Evaluation	2008-12-22	

Project **Tasks** **Resources** **Documents** **Notes** **History**

Project Details:

- Responsible:** Kovaleva, Alicia
- Name:** ERP PROJECT
- Code:** ERP1
- Parent Project:**
- Assigned ?**
- Applies to:**
 - Account: Sample Customer
 - Template
- Billing Info:**
- Description:**

Configuration:

- Type:** Development
- Status:** In Progress
- Rating:** Hot
- Success %:**
- Billing Type:** Hour
- Revenues:** 100,000.00

Dates:

- Start:** 2008-12-01
- Due:** 2009-03-06
- End:** 2009-02-18

Taxation Information:

- Country:** Canada
- Province / State:** Ontario
- Rule Type:** Regular

Buttons: Clone, New, Modify, Delete, Save, Cancel

Created By at.sales.representative@myriadsuite.com On 2008-12-06 11:34:54 / Updated By at.superuser@myriadsuite.com On 2008-12-29 09:49:41

Description

There are several ways a project can be created.

A project can be created automatically by MyriadApp when generating an order from an opportunity comprising a New Project line item. The project is generated with a list of tasks already created if a project template is used at the moment of order creation.

Another way to create a project is using an existing project or a project template and clone it. Find a project/template using Search Criteria and then use the **Clone** button to make a copy of the project properties, tasks and resources.

Finally, a project can be created from scratch. Use the **New** button to define and add a new Project.

Set its mandatory fields (in red) and set its Billing Type to < Hours > if you want to invoice resource time sheet hours.

Note :

- You can manage any types of project and add project types from Data. Pick List Values : PROJECTTYPE

How to Manage Project's Tasks

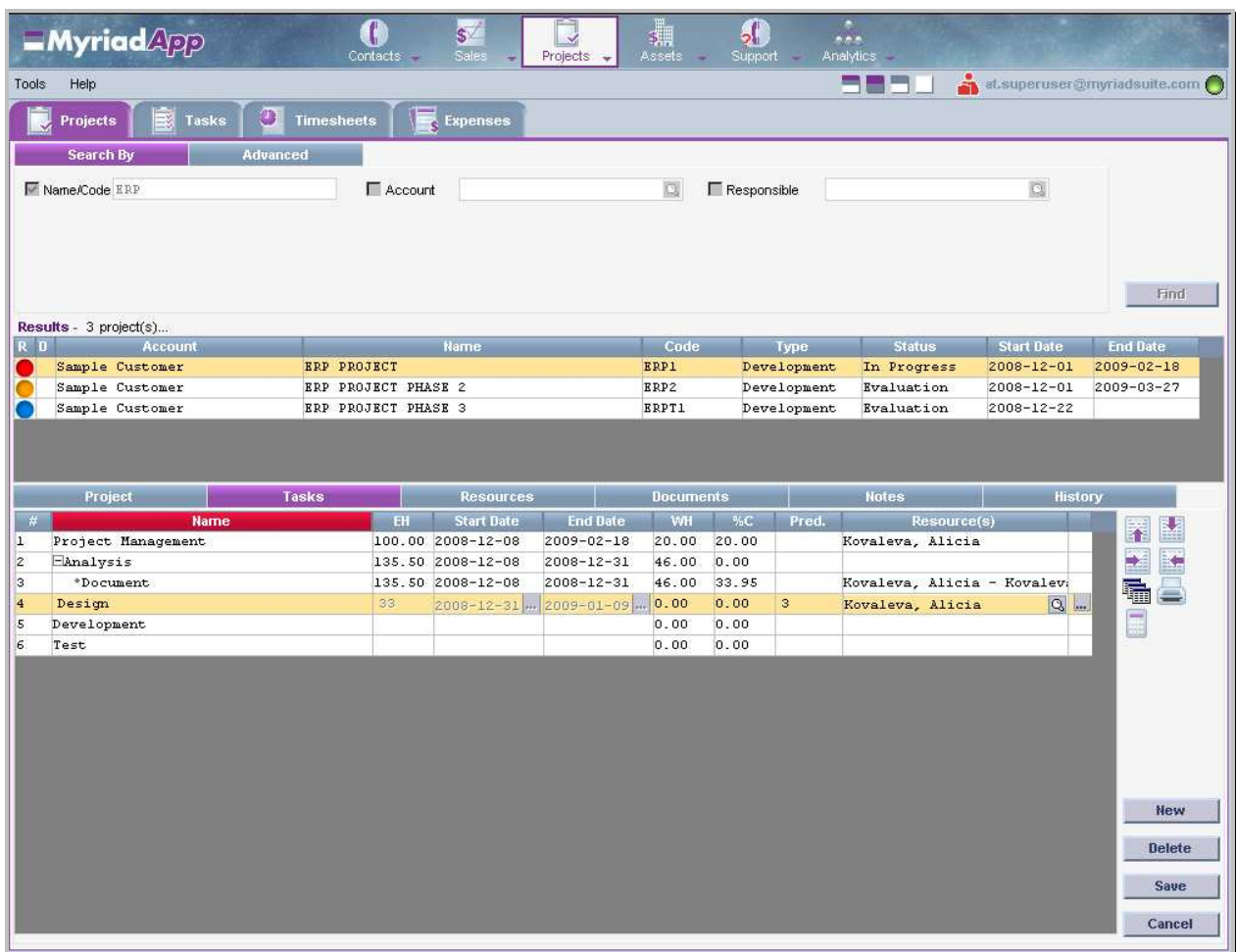
Go to Projects application



Description

Select Projects process and then Projects application.

Add a Task to the Project



Search By **Advanced**

Name/Code ERP Account Responsible

Find

Results - 3 project(s)...

R	D	Account	Name	Code	Type	Status	Start Date	End Date
●		Sample Customer	ERP PROJECT	ERP1	Development	In Progress	2008-12-01	2009-02-18
●		Sample Customer	ERP PROJECT PHASE 2	ERP2	Development	Evaluation	2008-12-01	2009-03-27
●		Sample Customer	ERP PROJECT PHASE 3	ERPT1	Development	Evaluation	2008-12-22	

Project		Tasks	Resources		Documents		Notes	History
#	Name	EH	Start Date	End Date	WH	%C	Pred.	Resource(s)
1	Project Management	100.00	2008-12-08	2009-02-18	20.00	20.00		Kovaleva, Alicia
2	Analysis	135.50	2008-12-08	2008-12-31	46.00	0.00		
3	*Document	135.50	2008-12-08	2008-12-31	46.00	33.95		Kovaleva, Alicia - Kovalev
4	Design	33	2008-12-31	2009-01-09	0.00	0.00	3	Kovaleva, Alicia
5	Development				0.00	0.00		
6	Test				0.00	0.00		



New **Delete** **Save** **Cancel**

Description


Go to Tasks tab.

Use the **New** button to define and add a new Task.

Use the **Move up** or **Move down** button   to move the task where required in the project plan.

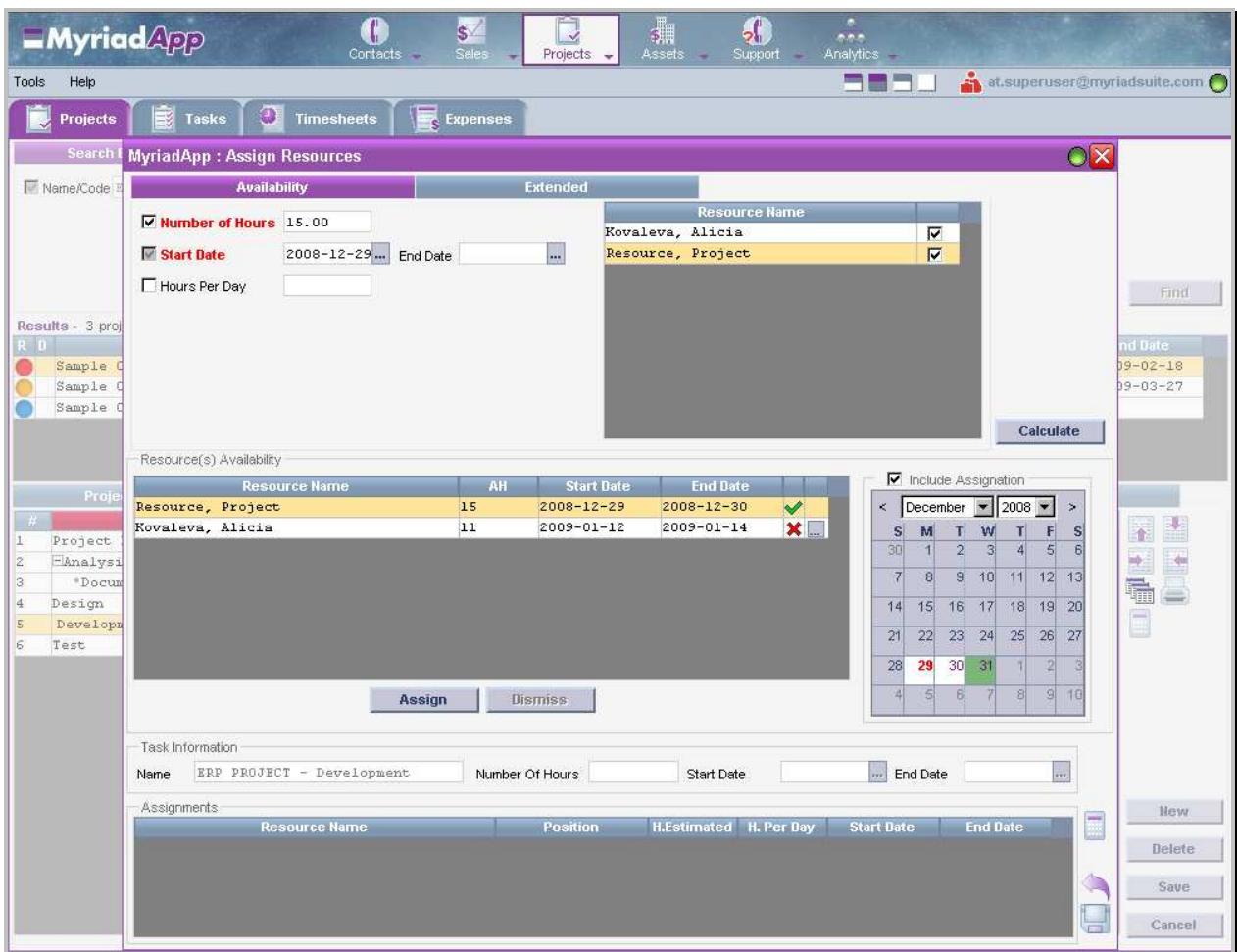
Use the **Increase Indent** or **Decrease Indent** button   to build project plan hierarchy.

Make sure you provide all the mandatory fields (in red).

Predecessor information (**Pred.**) is used when calculating  Start and End Dates for each Task.

Use the **Save** button when information has been entered.

Assign Resources to Tasks




Description

A resource can be directly assigned using the search field  from the **Task** grid:

4	Design	33.00	2008-12-31	2009-01-09	0.00	0.00	3	Kovaleva, Alicia
5	Development		0.00	0.00		
6	Test				0.00	0.00		

The table shows a dropdown menu for the resource column, with 'Kovaleva, Alicia Adminis' and 'Resource, Project Archit' visible.

Or from the **Assign Resource** window to verify and insure resource availability.

In order to load the **Assign Resource** window, use the **Assign Resource** button  on Task row under Resource column.

Assign Resource window is then loaded as shown above with the list of project resources.

Use the **Calculate** button to view resource availability, including current task assignment, presented in the monthly calendar.

Resource availability can be managed with Calendars and Activities applications from the Impact of availability status field.

<		December		2008		>	
S	M	T	W	T	F	S	
30	1	2	3	4	5	6	
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	31	1	2	3	
4	5	6	7	8	9	10	


- A day displayed in white show no more time is available.
- A day displayed in yellow show part of the time available has been assigned.
- A day displayed in green show no assignment at all was created when available time exists.
- A day displayed in red would show more time is assigned for the day than the resource actually has (over assignment).

Detail of assignments and availability for the day appears in a box when pointing a day with cursor.

<		December		2008		>	
S	M	T	W	T	F	S	
30	1	2	3	4	5	6	
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	31	1	2	3	
4	5	6	7	8	9	10	

2,5 hrs : ERP Project - Deployment
Available Time : 5 hrs

In order to assign a resource for the task, select the resource and use the **Assign** button.


Use the **Save** button  when you are done with current task assignment.

Manage Under or Over Assignment of Resources

UnderAssignment/OverAssignment By Resources By Day														Page 1 of 1			
														Report Date : 2008-11-13			
		(YYYY)															
		(MONTH)	October														
			31	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Resource, Project	EP1, ERP Project	XL-Factory	7.5*	0*	0*	7.5*	7.5*	0*	0*	0*	0*						
		Design			0*	0*	0*	7.5*	7.5*	0*	0*						
		Development			0*	0*	0*	0*	0*	7.5*	0*						
		Sub Total	7.5	0	0	7.5	7.5	7.5	7.5	7.5	0	0	0	0	0	0	0
	Sub Total	8	0	0	7.5	7.5	7.5	7.5	7.5	0	0	0	0	0	0	0	
Technician, Support		Sub Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	Sub Total	7.5	0	0	7.5	7.5	7.5	7.5	7.5	0	0	0	0	0	0		
Manager, Project	CP, Customer Project	Management	0*	0*	0*	0*	0*	2.5*	0*	0*	0*						
		XL-Factory	0*	0*													
		DOC			0*	0*	0*	5*	0*	0*	0*						
	Sub Total	0	0	0	0	0	7.5	0	0	0	0	0	0	0	0		
	EP1, ERP Project	Management	0	0	0	0	0	0	0	0	0	0	1.5	1.5	1.5	1.5	1.5
		Sub Total	0	0	0	0	0	0	0	0	0	0	1.5	1.5	1.5	1.5	1.5
Sub Total	7.5	0	0	7.5	7.5	7.5	7.5	7.5	0	0	0	1.5	1.5	1.5	1.5	1.5	
Resource Project 1	EP1, ERP Project	Design															
		Development															
	Sub Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Sub Total	7.5	0	0	7.5	7.5	7.5	7.5	7.5	0	0	0	7.5	7.5	7.5	7.5	7.5	
Resource Project 2	EP1, ERP Project	DOC					7.5	7.5	7.5	7.5	0	0	7.5	7.5	7.5	7.5	
		Development															
	Sub Total	0	0	0	0	7.5	7.5	7.5	7.5	0	0	7.5	7.5	7.5	7.5	7.5	
Sub Total	7.5	0	0	7.5	7.5	7.5	7.5	7.5	0	0	0	7.5	7.5	7.5	7.5	7.5	

Description



Use the **Assignment Report** button  on Tasks tab to produce Under/Over Assignment Report.

Over assignment appears in red and under assignment appears in yellow.

A day in white means assignments and available time fit perfectly whereas a day in green means no assignment was created but available time exists for that day and resource.

How to Manage Timesheets

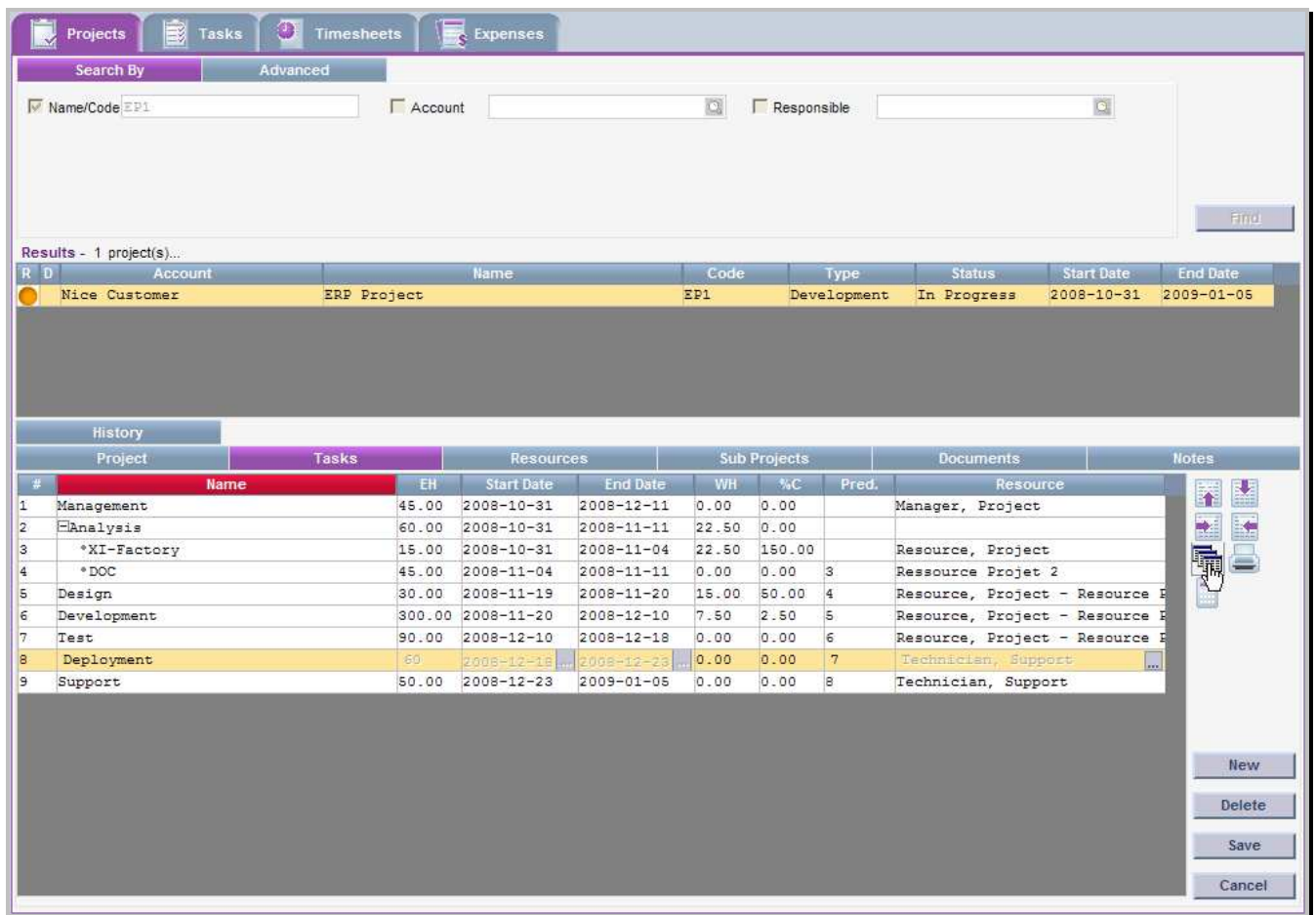
Go to Projects application



Description

Select Projects process and then Projects application.

Add Tasks to Timesheets from Projects application



Search By: **Advanced**

Name/Code: EPI Account Responsible

Find

Results - 1 project(s)...

R	D	Account	Name	Code	Type	Status	Start Date	End Date
0		Nice Customer	ERP Project	EPI	Development	In Progress	2008-10-31	2009-01-05

History

Project		Tasks	Resources		Sub Projects			Documents	Notes
#	Name	EH	Start Date	End Date	WH	%C	Pred.	Resource	
1	Management	45.00	2008-10-31	2008-12-11	0.00	0.00		Manager, Project	
2	Analysis	60.00	2008-10-31	2008-11-11	22.50	0.00		Resource, Project	
3	*XI-Factory	15.00	2008-10-31	2008-11-04	22.50	150.00		Resource, Project	
4	*DOC	45.00	2008-11-04	2008-11-11	0.00	0.00	3	Resource, Project - Resource P	
5	Design	30.00	2008-11-19	2008-11-20	15.00	50.00	4	Resource, Project - Resource P	
6	Development	300.00	2008-11-20	2008-12-10	7.50	2.50	5	Resource, Project - Resource P	
7	Test	90.00	2008-12-10	2008-12-18	0.00	0.00	6	Resource, Project - Resource P	
8	Deployment	60	2008-12-18	2008-12-23	0.00	0.00	7	Technician, Support	
9	Support	50.00	2008-12-23	2009-01-05	0.00	0.00	8	Technician, Support	


New
Delete
Save
Cancel

Description

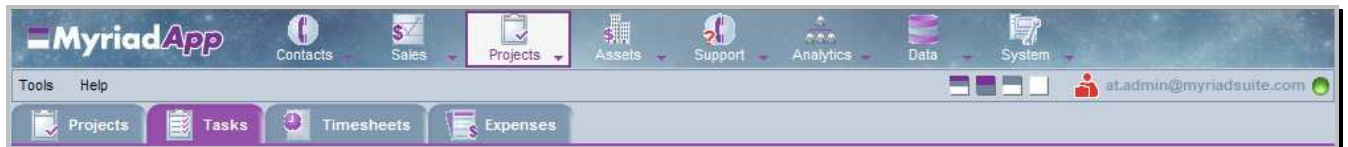
Select a project using Search Criteria.

Go to Tasks tab.

Select a task.

Use the **Add to Resources timesheets** button  to add the Task to the resource(s) timesheet(s).

Go to Tasks application



Description

Select Projects process and then Tasks application.

Add Tasks to Timesheet from Tasks application

Search By: **Advanced**

Name

Project: ERP Project

People:

Responsible: Horton, Robby

Resources: Horton, Robby

Find

Results - 9 task(s)...

P	D	Account	Name	Applies to	Type	Status	Start
		Nice Customer	Design	ERP Project			2008-11-19
		Nice Customer	Analysis	ERP Project			2008-10-31
		Nice Customer	DOC	ERP Project			2008-11-04
		Nice Customer	XI-Factory	ERP Project			2008-10-31
		Nice Customer	Support	ERP Project			2008-12-23
		Nice Customer	Deployment	ERP Project			2008-12-18

Discounts / Surcharges		Documents		Notes		History	
Task	Resources	Sub Tasks		Prices			
Status	Name	Position	Start	End	Worked	Estimated	%
	Technician, Support	Assistant	2008-12-23	2009-01-05	0	50	0
	Resource, Project	Assistant	2008-12-23	2009-01-05	0	0	0

Position: Assistant Start Date: 2008-12-23 Hours per day: End Date: 2009-01-05 Estimated Hours: 50.00

Notes:

Assign/Dismiss... Clone Modify Save Cancel

Created By: at.project.manager@myriadsuite.com On 2008-10-31 14:00:57 / Updated By: at.admin@myriadsuite.com On 2008-11-13 11:26:07


Description

Find Tasks using Search Criteria.

Go to Resources tab.

Select one or more resource(s).

In order to select more than one resource, hold CTRL or SHIFT button and select resources.

Use the **Add to timesheet** button  to add the Task to the resource(s) timesheet(s).

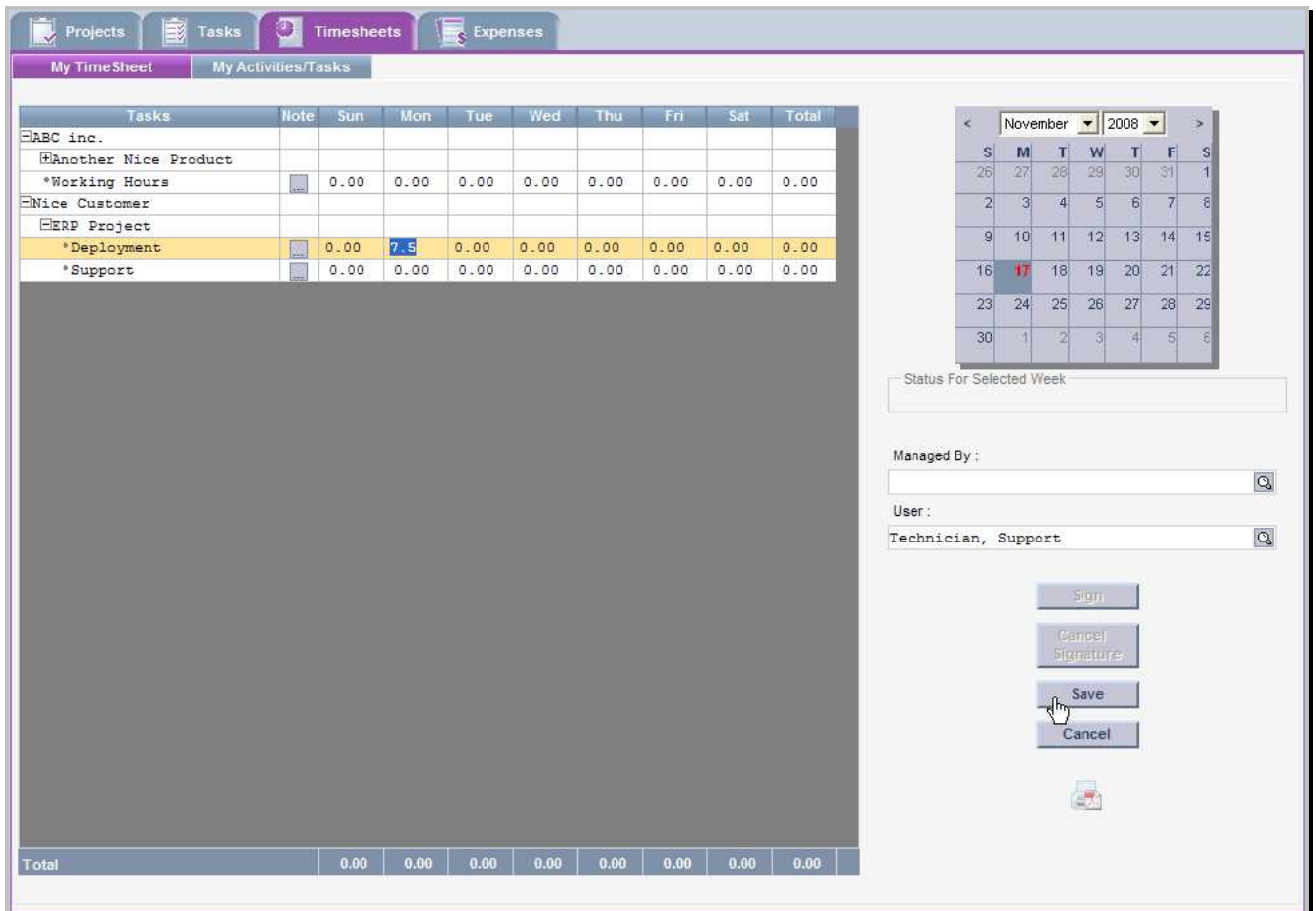
Go to Timesheets application



Description

Select Projects process and then Timesheets application.

Add Time to Timesheet



Description

Select a Task.

Add time in hours for the day.

Use the **Save** button when information has been entered.

Once time for the entire week has been entered, timesheet can be signed by both the resource and the manager using **Sign** button.

Only time signed by the manager is taken into account by Projects application calculations and project invoicing process.

Remove a Task from Timesheet

Projects Tasks Timesheets Expenses

My TimeSheet My Activities/Tasks

Find Activities/Tasks by

Status Active Inactive

User

Find

Activities/Tasks List - 3 Activity(ies)...

Account	People / Project / Product / Asset	Name	Type	Active
ABC inc.		Working Hours		<input checked="" type="checkbox"/>
Nice Customer	ERP Project	Deployment		<input checked="" type="checkbox"/>
Nice Customer	ERP Project	Support		<input checked="" type="checkbox"/>

Activity/Task

Active

Description

Deactivate

Modify

Save

Cancel

Created By at.admin@myriadsuite.com On 2008-11-17 15:34:30 / Updated By at.admin@myriadsuite.com On 2008-11-17 15:34:30

Description

Go to My Activities/Tasks tab.

Select a Task.

Use the **Deactivate** button to remove the task from timesheet.

How to Configure a Project for Billing Hours

Go to Job Positions application



Description

Select System process and then Job Positions application.

Add Job Positions for project's resources

The screenshot shows the 'Add Job Positions' form. At the top, there is a search bar with a 'Find' button. Below it, a table lists 6 job positions. The 'Project Manager' position is highlighted in yellow. Below the table, there is a form to edit the selected position. The form fields are: Name (Project Manager), Hourly rate (100.00), Effective Date (2008-01-01), and Description (empty text area). At the bottom right, there are buttons for 'New', 'Modify', 'Delete', 'Save', and 'Cancel'. A mouse cursor is pointing at the 'Save' button. At the bottom left, there is a footer with the text: 'Created By defaultAdmin@myriadsuite.com On 2008-07-17 17:13:59 / Updated By default.admin@myriadsuite.com On 2008-11-18 14:35:49'.

ID	Name	Hourly Rate	Effective Date	Description
	Administrator	125.00	2008-01-01	
	Technician	75.00	2008-01-01	
	DBA	100.00	2008-01-01	
	Analyst/Programmer	80.00	2008-01-01	
	Architect	120.00	2008-01-01	
	Project Manager	10.00	2008-01-01	

Position: Project Manager
 Hourly rate: 100.00
 Effective Date: 2008-01-01
 Description:

Description

Go to Job Positions tab.

Use the **New** button to define and add a new Position.

Hourly rate will be used for billing projects' hours.

Make sure you provide all the mandatory fields (in red).

Use the **Save** button when information has been entered.

Go to People application



Description

Select Contacts process and then People application.

Add Job Positions to project's resources

Accounts
People
Business Cards

Search By
Advanced

Name

Number/Code

Updated Since

Phone

Responsible

Updated Date -

Results - 1 people...

R	D	Account	Last Name	First Name	Type	Status
		ABC Inc.	Kent	Frank	Employee	Active

Notes
History

Products
Managed Employees
Job Positions
Billing Info.
Quotas
Leave Rules
Documents

People
Addresses
Contact Mechanisms
Personal Info.
Medical Info.
Characteristics
Activities

Is Default	Name	Hourly Rate	Effective Date
<input checked="" type="checkbox"/>	Project Manager	100.00	2008-01-01

Is Default

Name

Hourly Rate

Effective Date

Created By defaultAdmin@myriadsuite.com On 2008-07-17 17:28:43 / Updated By default.admin@myriadsuite.com le 2008-11-11 10:50:00

Description

Go to Job Positions tab.

Use the **New** button to define and add a new Position.

Hourly rate will be used for billing projects' hours.

Make sure you provide all the mandatory fields (in red).

Use the **Save** button when information has been entered.