1 Introducing ONEPOINT Projects

■ ONEPOINT Projects is a project leadership software which integrates project planning, progress tracking, monitoring, controlling and reporting into a single, easy to use solution.

We are using the term "project leadership software", because the functionality provided by ONEPOINT Projects is somewhere between traditional Project and Portfolio Management (PPM) and Enterprise Project Management (EPM) systems. ONEPOINT Projects has a strong focus on providing always up to date key information which is required in order to really *lead* projects (rather than just to manage/administrate them).

ONEPOINT Projects Enterprise Server and Group Server provide functionalities which are important for medium and large sized companies and projects. The Enterprise and Group Servers are designed as a web-based multi user application. On starting the application, every user has to authenticate with his user account and a password.

The solution is mainly focused on the workflows and the operating figures inside individual projects. Simultaneously, the basic features of multi project and portfolio management are supported, as well.

This section introduces ONEPOINT Projects's structure and some operational principles.

1.1 Integrative Design of ONEPOINT Projects

ONEPOINT Projects offers systematic support for project management processes - it is not just a "planning tool".

1.1.1 Team-oriented Project Planning

ONEPOINT Projects enables you to create new projects easily and fast. It offers interactive planning across all relevant project dimensions (resources, costs, dates, content) including work breakdown structure (WBS), deliverables, activity list, schedule (GANTT), cost plan and milestones with payment plan. These different views are totally synchronized. Color-coded activity categories make the plans easy to read. In addition, project templates featuring mandatory and optional elements provide a convenient way to obey project guidelines (e.g., ISO-9001). With the option for Agile Planning, projects can be planned according to SCRUM.

The planning is completely done inside the Web browser, but still comfortable and efficient like in Microsoft Excel.

The activity list is used mostly to enter tasks and milestones and to manage project resources. The schedule (GANTT) displays chronological events and dependencies and allows you to visually estimate effort.

ONEPOINT Projects's interactive work breakdown structure (WBS) supports the first step in the project life-cycle - the drawing up of a project concept. It makes it very simple for the project team to develop an initial project plan. It allows you to plan projects using inline editing and drag & drop. The WBS provides a very good overview of the project without easily distracting from your objectives such as, e.g., a schedule sometimes does. In addition, you can use the WBS to control your project's progress content-wise.

The integrated cost plan includes the automated calculation of personnel costs. Personnel costs are calculated automatically based on effort, percentage or hourly assignment and the hourly rates specified for the given resources. All other cost types can be simply typed into the respective columns. Hence, no external Excel sheets for the project costs projection are needed anymore. The administrative workload of the project managers is decreased and at the same time the error risk is reduced.

The strict resource management in ONEPOINT Projects connects resource planning to project planning. It can be controlled which project managers can access what resources. Resource conflicts between projects are reduced and less synchronization effort is required.

1.1.2 Integrated Project Controlling

The team-oriented project progress tracking (time, effort, costs, estimation of remaining effort/costs) distributes this task among all project contributors. Hence, the refresh rate and the quality of the project controlling data are increased.

An integrated tool for monitoring the project progress in the dimensions dates, effort and costs is available to the project manager.

ONEPOINT Projects provides ad hoc plan-actual comparisons (effort, costs, and dates) in tabular forms and as diagrams. The ad hoc plan-actual comparisons for project resources and costs instantly show deviations using traffic light colors (red/green). Deviations are based on the plan value and a simple, linear projection in order to show a realistic scenario while still remaining transparent and easy to understand.

Automatically versioned project plans and schedule histories make it easier to recognize changes and to make them provable. The version control of ONEPOINT Projects also allows to continue planning while implementing the project.

ONEPOINT Projects offers a milestone controlling in the form of a milestone table or using the work breakdown structure. No manual creation and comparison of milestone tables are needed anymore.

1.1.3 Ad hoc Monitoring & Traffic Light Functions

ONEPOINT Projects assists to increase the resource utilization and to decrease the risk of missing important deadlines.

ONEPOINT Projects includes an ad hoc resource utilization chart across all projects for all expanded resources. Different colors in the chart allow you to quickly identify potential resource conflicts. In addition, you can easily see which resources still have capacity left. Detailed information about the utilization can be simply obtained by moving the mouse cursor over the area in question. A direct link to the respective project plans supports to solve the resource conflicts between projects.

The project overview including trend bars provides an overview over all projects and shows negative tendencies between degree of completion, resources, and costs at an early stage. High risk projects can be recognized and counteractive measures can be induced.

The project pipeline is a graphical visualization which classifies the projects by their pipeline stage. The diagram includes the relative size of the projects and a traffic light function.

The milestone trend analysis is automatically created on basis of the schedule history. The chart shows you how milestones "move" over time: This helps you to identify trends easier and, thus, to predict delays. For example, if you have each week a small delay it is hard to spot in a milestone list, but in the trend analysis you instantly "see" it as a diagonal line.

The project status report including a project traffic light always shows the status of your project in the form of a professional, printable report.

1.1.4 Comprehensive and Flexible Project Reporting

ONEPOINT Projects provides a powerful, integrated reporting engine and ships with five standard reports (PDF, for example, a project progress report, a work report, or a delivery forecast report). In addition, it is possible to create reports by yourself.

ONEPOINT Projects uses a single, continuous, relational project database for all planning and controlling data. It makes comprehensive, ad hoc reporting possible: Always up-to-date plan-actual comparisons across all relevant project dimensions provide for a high project transparency and reduce the project risk.

1.2   User Interface

After starting the ONEPOINT Projects application server a startup page is display to the user who opens the application in a web browser.


After complete start of application the page with the login dialog is displayed to the user (see 'Accessing the ONEPOINT Projects Web Interface' on page 20).

ONEPOINT Projects's user interface is designed to be easy to learn and to use. Basically, the interface is divided into four parts:

1   The upper part of the application contains the tool groups of ONEPOINT Projects (it is bordered in red in the figure below and marked with 1). The underlying tools are logically grouped into tool groups and can thus be easily accessed. The tool groups of ONEPOINT Projects are:

- MY WORK
- PROJECTS
- RESOURCES
- STRATEGY
- CUSTOMERS
- REPORTS

2   The part of the screen below the tool groups displays the tools of the selected tool group. The tools are distributed on tabs. This part is bordered in red in the figure below and marked with 2. Depending on the selected tool, a toolbar with specific icons of the tool is displayed. Complex tools such as the planning or controlling tool contain additional views which are displayed between the toolbar and tool tabs.

3   On the left side of the application, a navigation tree is displayed. This section of the interface is bordered in red in the figure below and marked with 3. The navigation tree is not displayed in the tool groups **MY WORK**, **STRATEGY and CUSTOMERS**. For all other tool groups it contains a tree of projects, resources, customers or reports.

4   The main part of the screen (it is bordered in red in the figure below and marked with 4) contains the individual interface of the component currently selected (e.g. a bar chart in the planning tool).

5   At the top right, the user settings, the system search field, the online documentation and the administrative part of the applications are available. This part is bordered in red in the figure below and marked with 5.

All interfaces of the tools are structured the same way (mostly tabular or graphical overviews, dialog-based edit functionality, selection-based delete and move functions) in order that the transition from one tool to the other is easy.
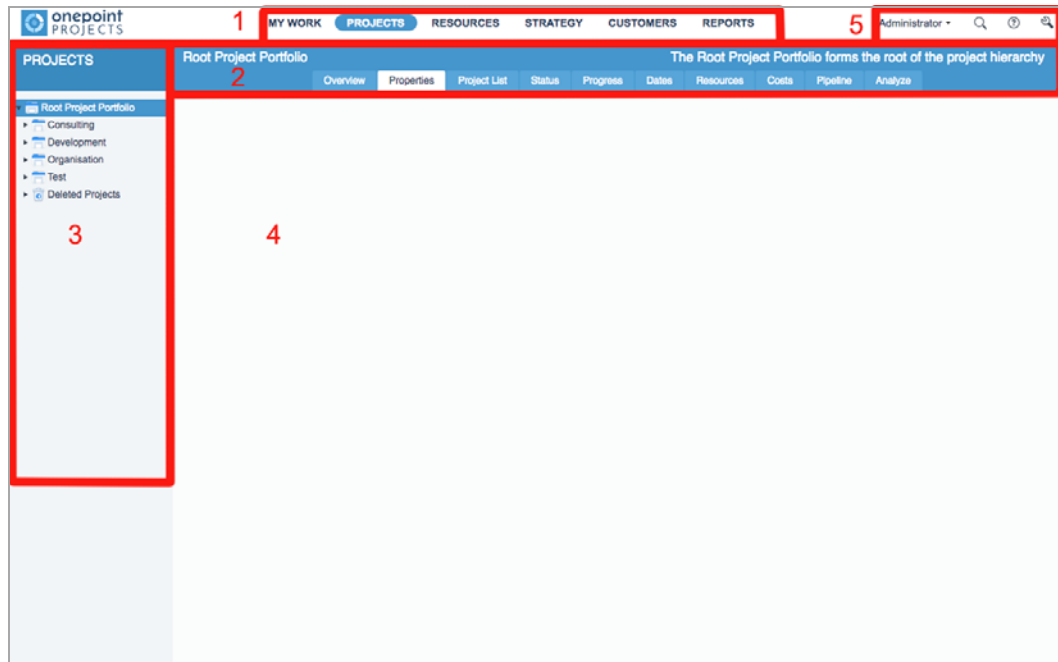
1.3   Basic Concepts

ONEPOINT Projects derives much of its innovative core functionality from the combination of modern project and resource management. In addition, functionality such as the possibility to separately plan effort and duration and the concept of tracking work package status together with actual effort makes it a very dynamic project leadership tool.

1.3.1   Projects vs. Resources

ONEPOINT Projects is focused on high tech R&D and consulting projects. Therefore, resources in ONEPOINT Projects are mainly human resources. Hence, resource costs always show up as personnel costs. ONEPOINT Projects integrates project and resource management concepts into a single solution. This approach makes functionality possible, such as an ad hoc resource utilization view for spotting resource conflicts, or the automatic calculation of base personnel costs based on hourly rates and planned efforts. In order for this to work, a strict resource management is necessary, i.e., all resources which are intended to be used in project plans have to be prior

- explicitly created as resources using the resource administration tool, and

- assigned to the project by the responsible resource manager.

1.3.2   Resources and Linked Users

Resources in ONEPOINT Projects are not equal to the users of the system. Instead, each resource can have exactly one user which is linked to the resource (while one user can be linked to multiple resources): This user gets all e-mail notifications, **contributor** role access to the resource's projects and his or her personal task list includes all tasks of the resource.

The separation of users of ONEPOINT Projects and resources for projects makes available the planning of subcontractors or external resources (who cannot access the ONEPOINT Projects system). Hence, it is also possible that project observers can use the controlling components, even though they do not act in person in the projects as resources.

1.3.3   Effort and Duration

You might know that Microsoft Project always links effort and duration: If you change the one the other is calculated based on various criteria. In contrast, ONEPOINT Projects allows you (as the project manager) to choose whether you want to plan **effort-based** (thus, linking effort and duration) or whether you want to plan effort and duration **independently**. In addition, you can choose whether you want to enter and see resource assignments in percentages (%) or in hours.

The combination of independent planning of effort and duration and the assignment of resources in hours is especially helpful if you need to schedule long durations where only a few hours of work have to be done.

1.3.4   Work Slips, Projections and Deviations

Actual values (work hours, costs, and estimations) are reported by the linked users of the resources themselves, i.e., by the project contributors. Especially the optional possibility for project contributors to estimate the remaining effort for completing the task frees the project manager from the tedious task of constantly asking all people working on the project whether their tasks are complete and/or how much longer it will take them to complete certain tasks.

As soon as a work slip is created or updated, all monitoring and controlling data is recalculated and all ad hoc views are automatically kept up to date.

Base-actual comparisons can be calculated against the last checked-in project plan or the selected baseline version, respectively (see 'Characteristics on Editing the Properties of a Project' on page 80). Projective views for the working version of a project plan are also available.

1.3.5   Roles and Permissions

ONEPOINT Projects provides seven access levels for users:

- System Users have administrator access to all objects by default.

- **Managers** own information like, e.g., only the managers of a resource are allowed to assign it to a project and only project managers are allowed to change the project plan.

- **Contributors** can contribute to information, but they do not own it.

- **External Contributors** have the same access rights for objects as Contributors. In the 'Tools Tool' (see page 270), the access rights for distinct views can be selectively set for this user access level.

- **Time Tracking: Users with this level can enter effort for resources to project activities.**

- **Observers** can only view information, but they are not allowed to change it.

- **Customer:** this access level allows to give restricted access to customer users for their projects. The level is similar to the Observer role but without access to cost information.

- **External:** external users can use the external option Jira Connector and Exchange Connector.

In addition to the access levels, all permissions are managed on a per-object level. Such objects are projects, portfolios (project folders), project templates, resources and resource pools. When creating a new object, its permissions are automatically copied from the parent object (for instance, a resource originally inherits the permissions of its pool it is created in). The administrator of the object can then change these permissions either at creation time or later on when editing it.

For the access rights, there are four roles available which are hierarchically organized, meaning that the first role is the weakest and the last one the strongest (always inheriting all permissions from the previous role):

- **Observers** have read acess for an object.

- The **contributor** role is currently only used for projects. Users with this role are allowed to report actual work hours, costs and estimations and to comment on tasks. On adding a resource to a project, the linked user (if specified) of the resource is automatically added with the role **Contributor** to the project. These access rights are maintained by the system and cannot be changed even by an **Administrator**.

- **Managers** are owner of an object with complete write access.

- **Administrators** own the object itself and its permission, i.e., the administrator of an object can do everything a manager can and, in addition, is allowed to change the object's permissions.

A detailed description of the principles of access control and how to set permissions for objects is given in 'Overview of User Rights for Objects' on page 31, in the chapters of the different objects and in 'Roles and Permissions' on page 313.

1.3.6 Modeling Matrix Organizations

The access control of projects (and hence their administration) is separated from the administration of resources. Matrix organizations, i.e., project organizations where the resource responsibility (team managers) is strictly separated from the project responsibility (project managers) can be easily modeled, because of ONEPOINT Projects's strict resource management: The project manager is not allowed to plan a resource before it was explicitly assigned to his project by the resource's manager.

Assigning the same rights to both sections does prevent from additional effort in administration for linearly structured enterprises.

1.3.7 User Preferences and System Settings

Every user has the possibility to choose the language of the user interface and his password in his own preferences.

In addition, a few numbers of system settings are available. Only users with the access level system can configure these settings for the whole system. For a complete list of the system settings, see 'Editing the System Settings' on page 286.

1.3.8 Open Design

Some table displayed and containing project or report data can be saved into a csv file (using the context menu which is available with a right mouse click). Hence, data can be transferred into external applications (e.g. Microsoft Excel).

Additionally, some diagrams can in this manner be exported as image file (e.g. for transfer into Microsoft PowerPoint).

In ONEPOINT Projects project plans can be imported and exported in file formats such as mpx, xls (export and import file format), xlsx (only for import) and XML. In this manner project plans can be exchanged with other applications which support this file format.