Project.js User Manual

Project.js Version 1.0

Developed by The Thinking Cap

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Introduction

A Brief Intro to Project.js 1.0

This is a web-based project management application that provides a visuals-based user interface for managing your projects. Specifically, this first version facilitates add, edit, delete and close operations, and provides a simple means of gauging the status of progression on a project and its elements.

Purpose of this User Manual

The purpose of this manual is to describe the functionality of the application according to the elements that make up a project (that is: project, project users, work breakdown structure, work packages, work items and milestones). Its aim is to provide a clear explanation 'how' to use project.js to perform tasks related to add/edit/delete/close operations of a project. Screenshots are used as visual aids to the text.

Intended Audience

It is assumed that the reader of this manual has prior knowledge of the elements of a project, and how they relate to one another in the context of project management.

Installation

System Requirements

For server installation:

- Linux operating system
- At least 20MB of space, plus enough storage to hold your database
- MongoDB 2.2.4 (http://mongodb.org/)
- Nodejs 0.10.3 (http://nodejs.org/)

For application use:

- a modern web browser (Firefox, Chrome)

Installation Steps

1. Open a command prompt
2. Navigate to the root directory where you will be saving your projects
3. run ‘npm install project-js’

Using Project.js

What this application does

Project.js facilitates add/edit/view/delete operations for your project with a simple user interface, and keeps track of and displays the status of projects, as well as their work packages and milestones.

Invoking the application

On the server machine, have the site administrator or IT staff perform the following:

1. Open a command prompt and run ‘mongod –dbpath <local or absolute path to database>’
2. Open another command prompt and navigate to the directory in which you installed project-js
3. run ‘NODE_ENV = production node app’
4. Provide the browser URL to your users

The User Interface

Project.js has a well-designed user interface, with a focus on simplicity and clarity. The main means of navigation is via tabs on the Project Dashboard (see ‘Project Dashboard’ below)

User Registration and Login

Upon first opening Project.js, you will be directed to the login page. Before signing in, must be registered as a user. To do so, click on ‘Sign Up’ and enter a username, password, email, along with your first and last names. You will then be able to sign and use the application.

Working with Projects

Projects Page

Once you have signed in, you will be directed to the Projects page. Any projects that have already been added will be listed here. To see details of each project, click on the project name, or select the project from the dropdown list on the navigation bar at the top of the screen. Buttons at the top of the list allow you to sort the order of the projects by title, completion level, or due date. To view details of a project, click on the name of the project.

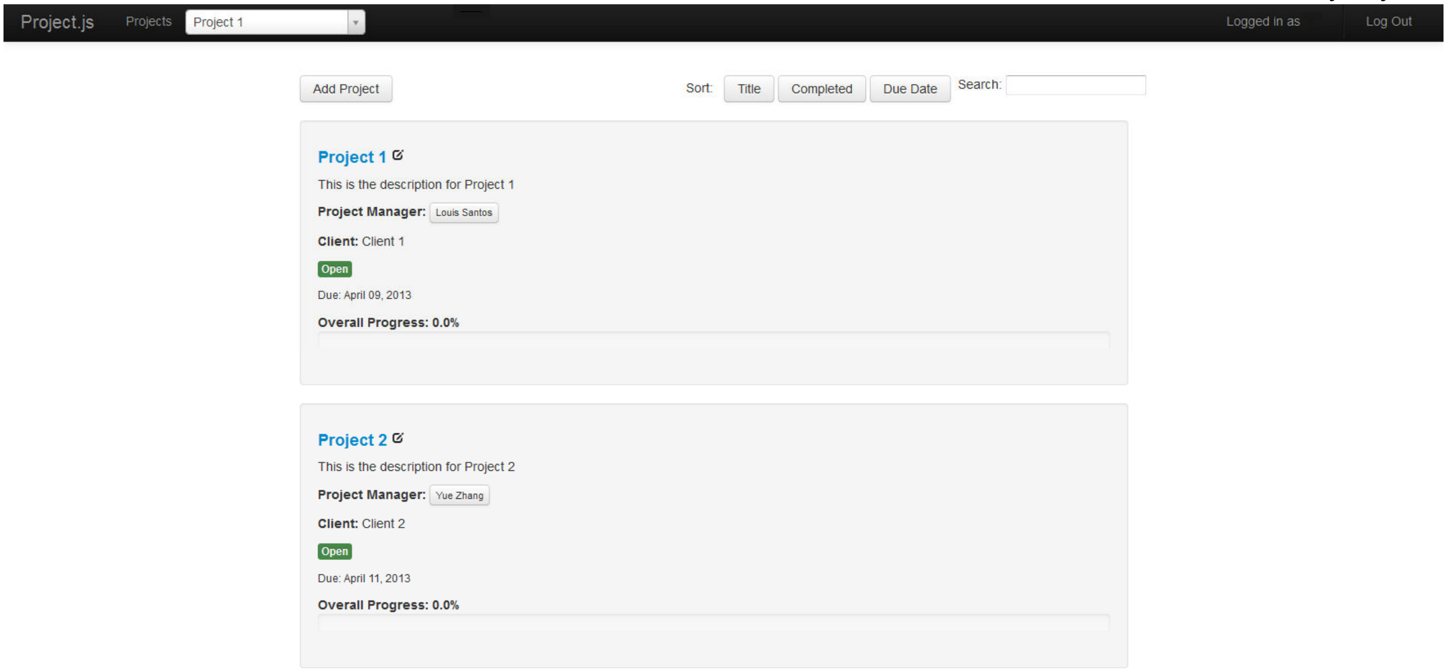

Figure 1 - Projects Page

Adding a Project

To a project, click 'Add Project' at the top left of the projects list and enter or select the information in the fields provided (title, description, due date, client name, status), and click 'Create'. Any required fields are outlined in red when you click on them. If you do not have a due date set for the project, the application will default to the current date. This can be edited once you have this information available (see 'Editing a Project' in the Project Dashboard section).

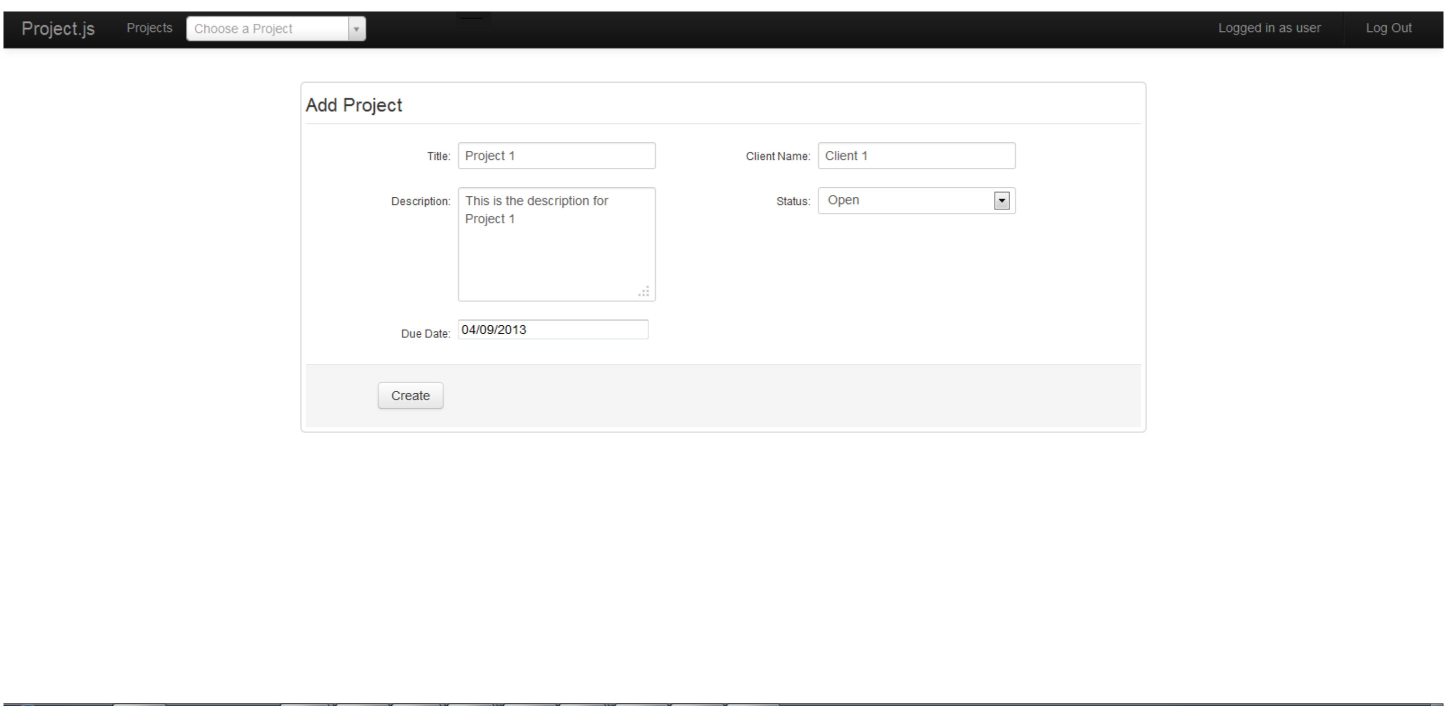

Figure 2 - Add Project

Project Dashboard

When your project is successfully created, you will be directed to the Project Dashboard, where you will see an overview of your project, including the Client name, project status ('open', 'late', 'closed', or 'deleted'), the due date, and a progress bar showing the project's percentage of completion. You can also edit your project details here (see "Editing a Project" below). To return to the projects listing page, click on 'Projects' to the left of the dropdown box at the top of the page.

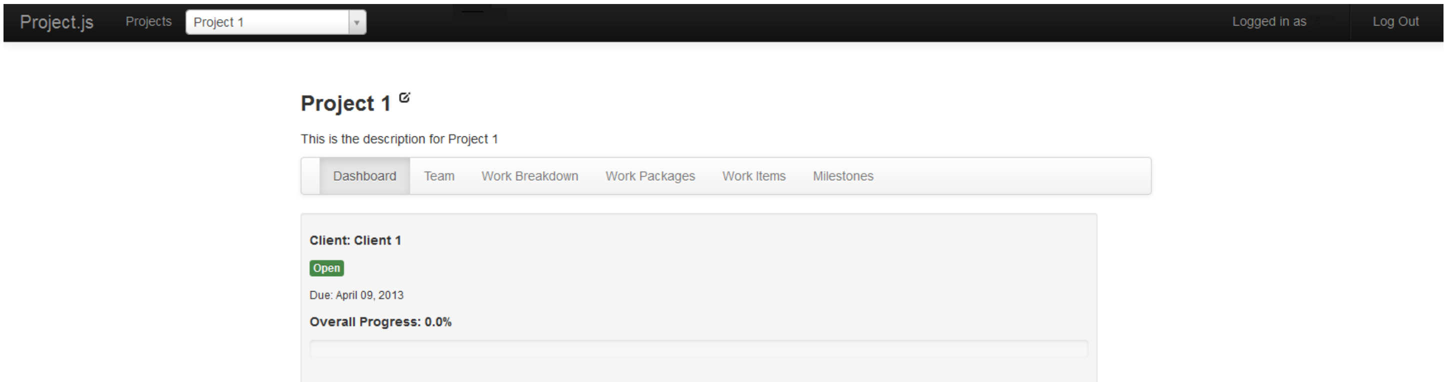

Figure 3 - Project Dashboard

To navigate within a project, the following tabs are available for you to select:

- Dashboard
- Team
- Work Breakdown
- Work Packages
- Work Items
- Milestones

Using these, you will be able to add/remove users to/from the project, create/edit a work breakdown structure, add/edit work packages, work items and milestones. (See the individual sections for these tabs below).

Editing a Project

To edit the details of a project, click on the symbol next to the project name, enter or select the new information, and click 'Update'. You will be directed back to the Project Dashboard, which will display the updated details.

Deleting a Project

If you need to delete a project, click on the symbol next to the project name, and select 'deleted' from the status dropdown box.

Closing a Project

Once a project is complete, you can close it by clicking on the symbol next to the project name, and selecting ‘closed’ from the status dropdown box.

Team

Selecting the Team tab will display a list of all users assigned to the project, and allow you to add users, change their roles, and remove users from a project.

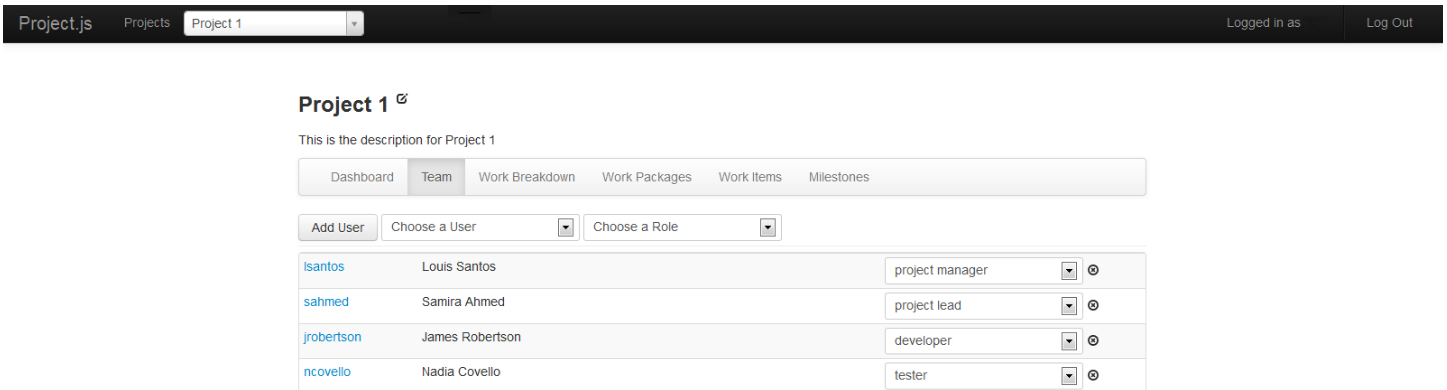

Figure 4 – Team

To add a user to the project, select a user and a role from the respective dropdown boxes underneath the navigation bar. Once selected, click ‘Add User’. The user’s name, username, and role will then be displayed on the screen. You may continue adding project users to build your project team.

The role for each user is displayed in a dropdown box, making it simple to change their role, if needed.

To remove a user from the project, click on the icon at the right of the user’s listing.

Work Breakdown

Selecting the Work Breakdown tab will display the work breakdown structure for the project, and allow you to create and edit items within it. Project.js has the capability for unlimited nesting in the structure. Figure 5 illustrates a simple example of this:

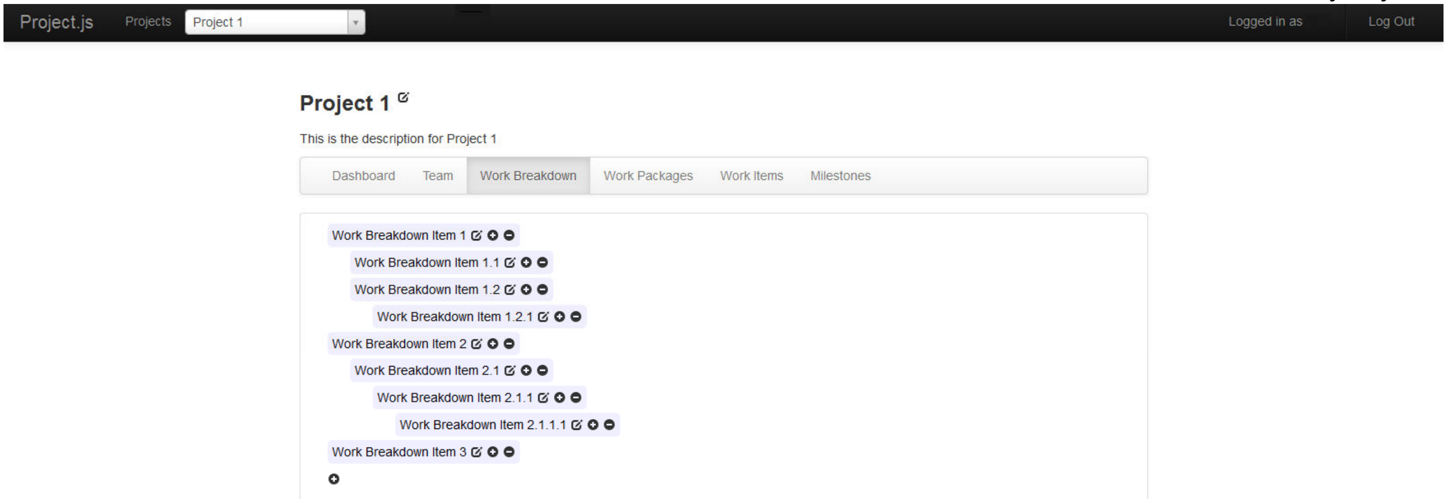

Figure 5 - Work Breakdown Structure

Adding a Work Breakdown Item

To add a top-level work breakdown item, select the symbol at the bottom of the list, and enter the title and (optionally) description of the item. To save, click , to cancel, click .

To add a nested-level work breakdown item, select the symbol next to the item under which this new item should be nested, and follow the same procedure.

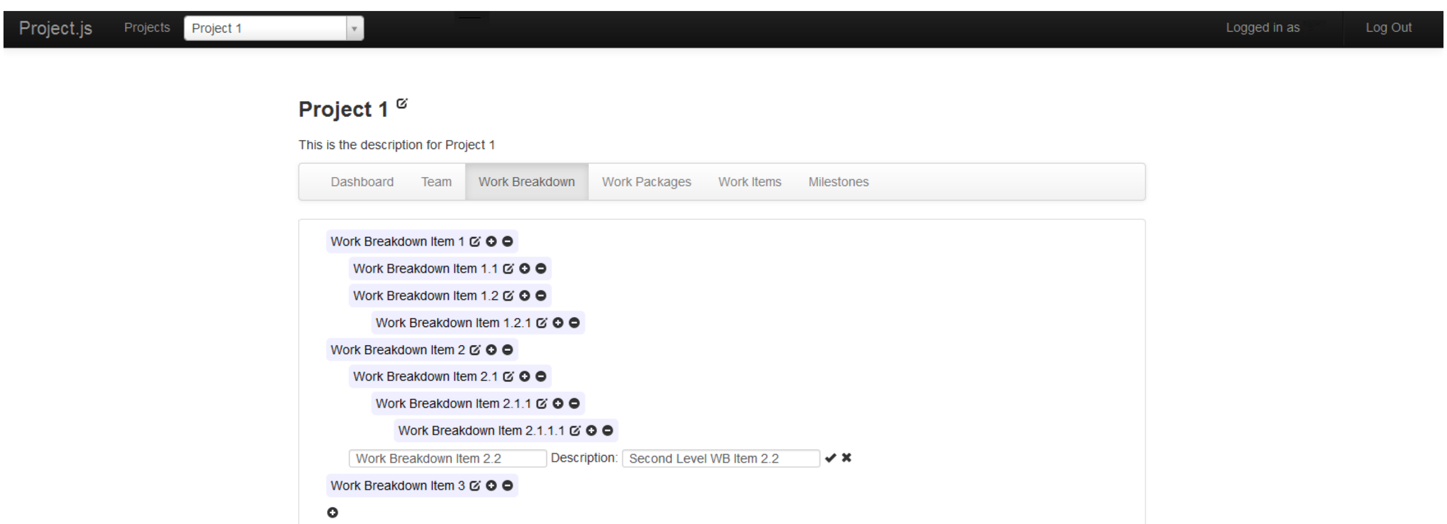

Figure 6 - Add a nested-level work breakdown item

Once saved, the structure will redisplay with the newly added item.

You may click on the name of an item to see its description. Clicking on it again will hide the description.

Editing a Work Breakdown Item

To edit the details of a project, click on the symbol next to the item you wish to edit, make changes to the title and/or description, and click to save, or to cancel.

Removing a Work Breakdown Item

To remove a work breakdown item, click on the symbol next to the item.

Work Packages

Selecting the Work Packages tab displays an overview of all the work packages in a project. The overview includes information such as:

- title
- description
- status
- a progress bar showing percentage of completion
- estimated time to complete
- any work items or dependencies belonging to a work package

This page also allows you to view details of specific work packages by clicking on their titles, as well as adding and editing work package information.

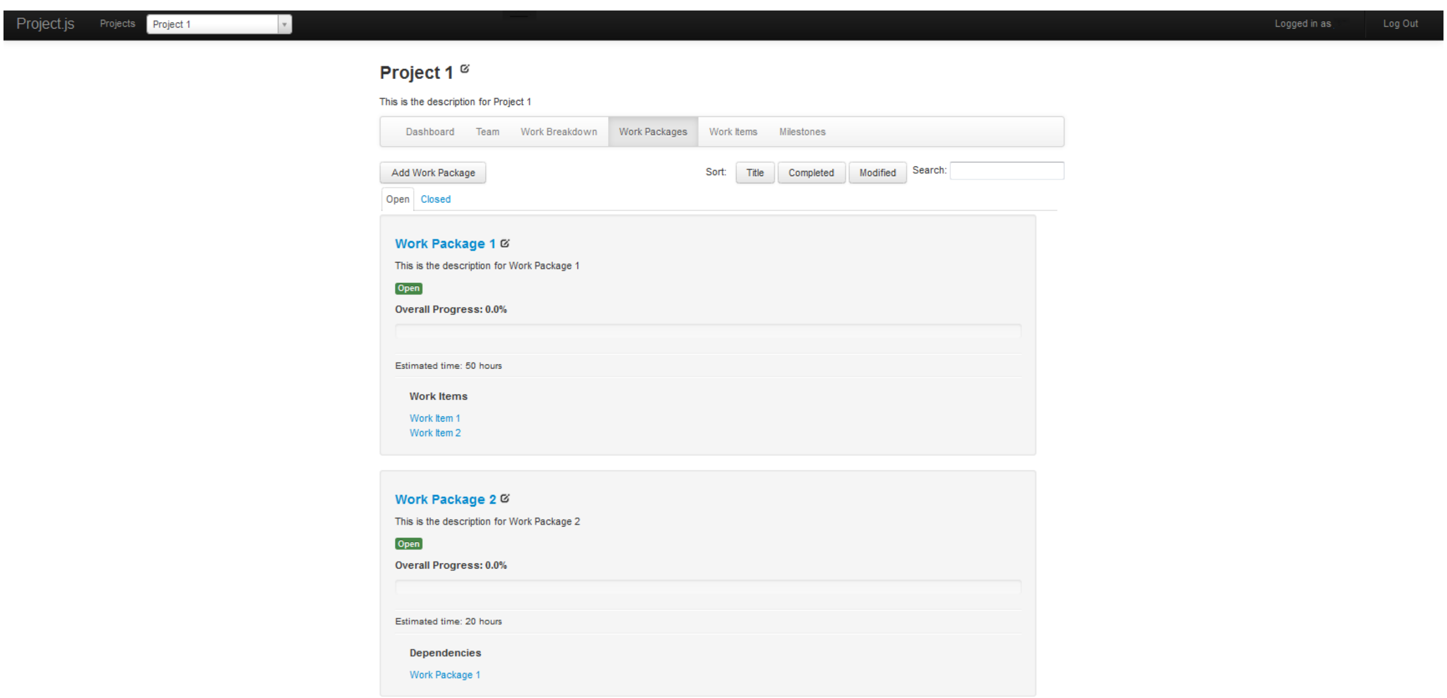

Figure 7 - Work Packages

Adding a Work Package

To add a work package, click 'Add Work Package' at the top left of the work package list and enter or select the information in the fields provided (title, description, priority, time estimate, status, work items that will belong to this work package, and any dependencies) and click 'Create'. Any required fields are outlined in red when you click on them.

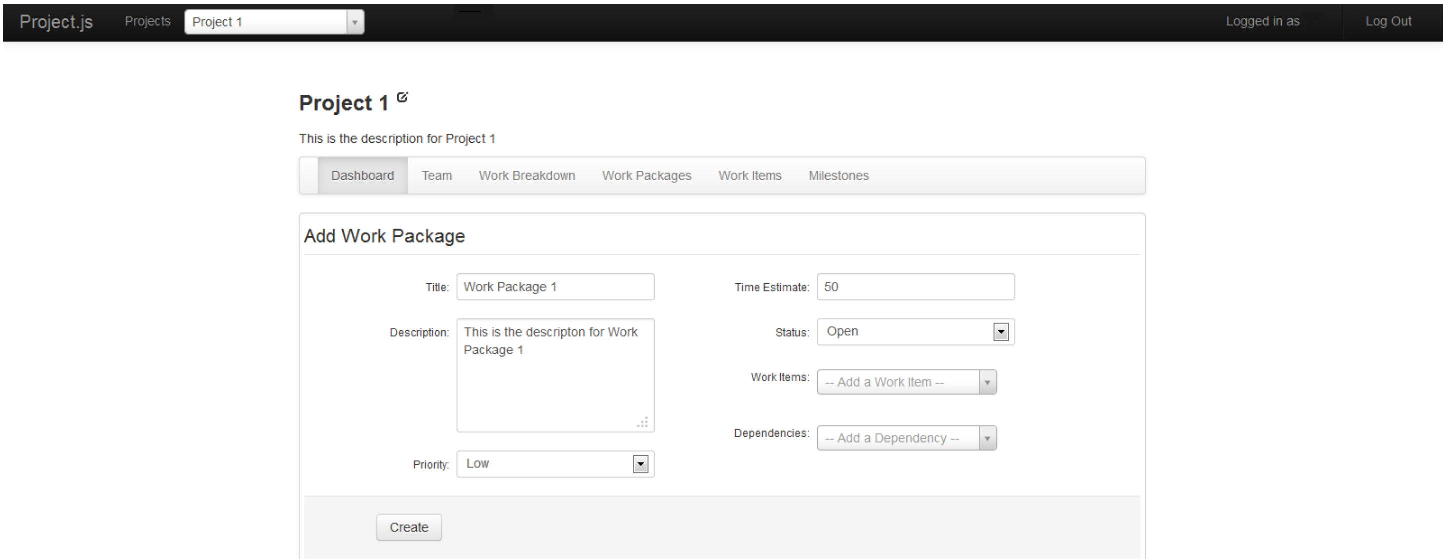

Figure 8 - Add Work Package

When the work package is successfully created, you will be directed to the Work Package detail page, where you will see an overview of the work package, including the following:

- title
- description
- status ('open', 'late', 'closed', or 'deleted')
- a progress bar showing the work package's percentage of completion
- estimated time to complete
- a list of any work items and/or dependencies this work package may have (these items are clickable, to navigate to their detail pages).

To return to the work packages listing page, click on the 'Work Packages' tab.

Editing a Work Package

To edit the details of a work package, click on the symbol next to the work package name (either in the work package detail page, or in the work packages listing page). Enter or select the new information, and click 'Update'. You will then be directed to the Work Package detail page, which will display the updated information.

Deleting a Work Package

If you need to delete a work package, click on the symbol next to the work package name, and select 'deleted' from the status dropdown box.

Closing a Work Package

Once a work package is complete, you can close it by clicking on the symbol next to the work package name, and selecting 'closed' from the status dropdown box.

Work Items

Selecting the Work Items tab displays an overview of all the work items in the project. The overview includes information such as:

- title
- description
- assigned user(s)
- status
- a progress bar showing percentage of completion
- time spent (if any)
- estimated time to complete

This page also allows you to view details of specific work items by clicking on their titles, as well as adding and editing item information.

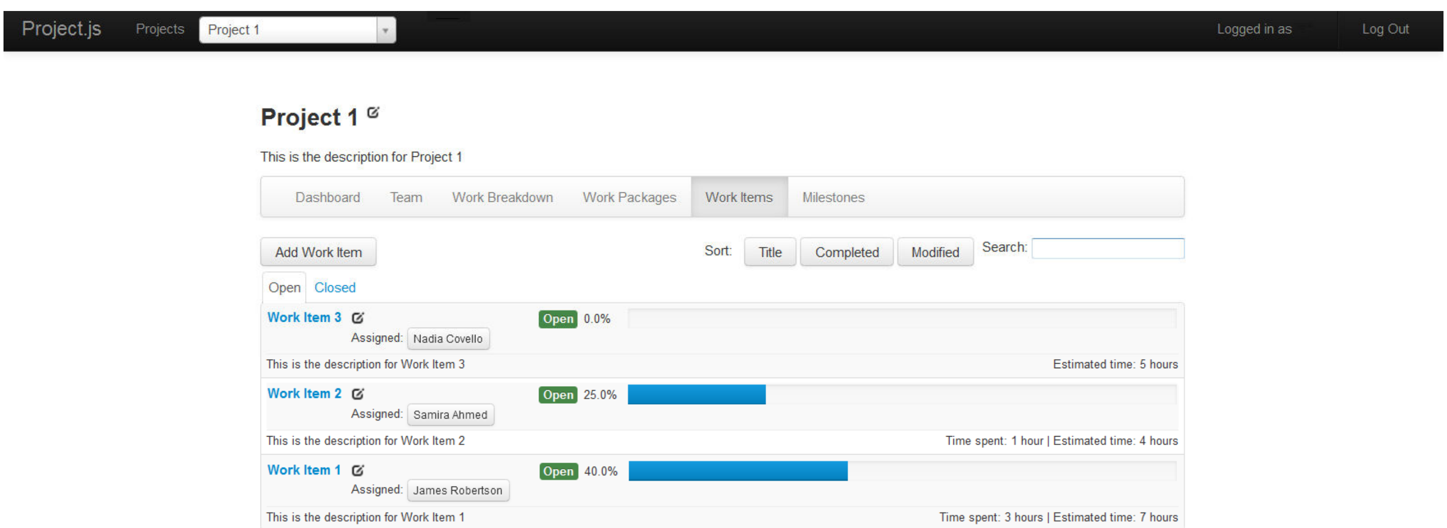

Figure 9 - Work Items

Adding a Work Item

To add a work item, click 'Add Work Item' at the top left of the work item list and enter or select the information in the fields provided (title, description, work packages this item will belong to, assigned users, dependencies, time estimate, time spent, completion percentage, and status) and click 'Create'. Any required fields are outlined in red when you click on them.

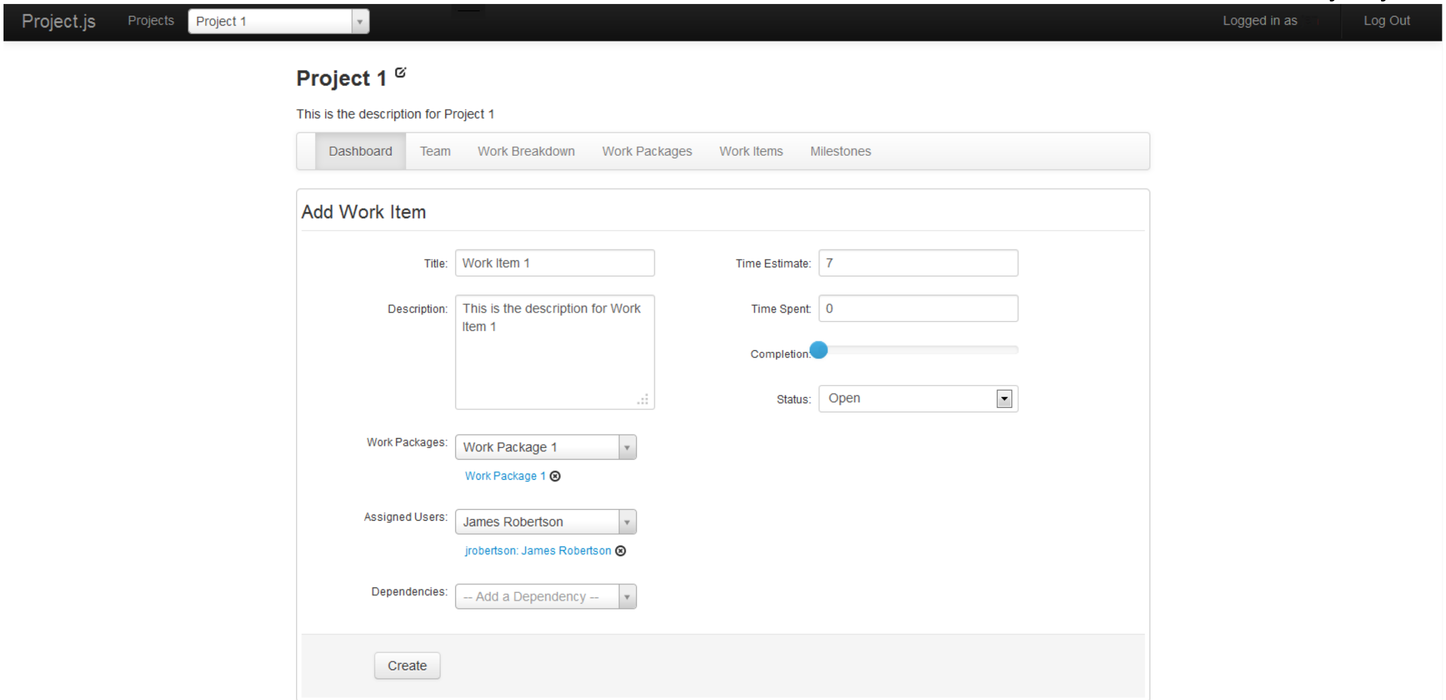

Figure 10 - Add Work Item

When the work item is successfully created, you will be directed to the Work Item detail page, where you will see an overview of the work item, including the following:

- title
- description
- status
- a progress bar showing percentage of completion
- assigned user(s)
- time spent in hours (if any)
- estimated time (in hours) to complete
- work package(s) to which this item belongs and/or dependencies (if any). These items are clickable, to navigate to their detail pages.

To return to the work items listing page, click on the 'Work Items' tab.

Adding a Comment to a Work Item

In the work item detail page, you have the option to add a comment to the item. Enter the title and text, and click 'Add Comment'. Your comment will then display below the work item details. To add another comment, repeat this step.

Editing a Work Item

To edit the details of a work item, click on the symbol next to the work item name (either in the work item detail page, or in the work items listing page). Enter or select the new information, and click 'Update'.

Please note:

- Time spent is the **total** time spent working on the item. If it currently lists 3 hours, and you spend another 4 hours working on this item, you will enter 7 into this field when editing the work item.
- To update the percentage of completion, click and drag the slider to the right until you reach the correct percentage, and then release.

When the work item has been successfully updated, you will be directed to the Work Item detail page, which will display the updated information.

Deleting a Work Item

If you need to delete a work item, click on the ✎ symbol next to the work item name, and select 'deleted' from the status dropdown box.

Closing a Work Item

Once a work item is complete, you can close it by clicking on the ✎ symbol next to the work item name, and selecting 'closed' from the status dropdown box.

Milestones

Selecting the Milestones tab displays an overview of all the milestones in a project. The overview includes information such as:

- title
- description
- status
- due date
- a progress bar showing percentage of completion
- any work package dependencies and/or dependencies on other milestones

This page also allows you to view details of specific milestones by clicking on their titles, as well as adding and editing milestone information.

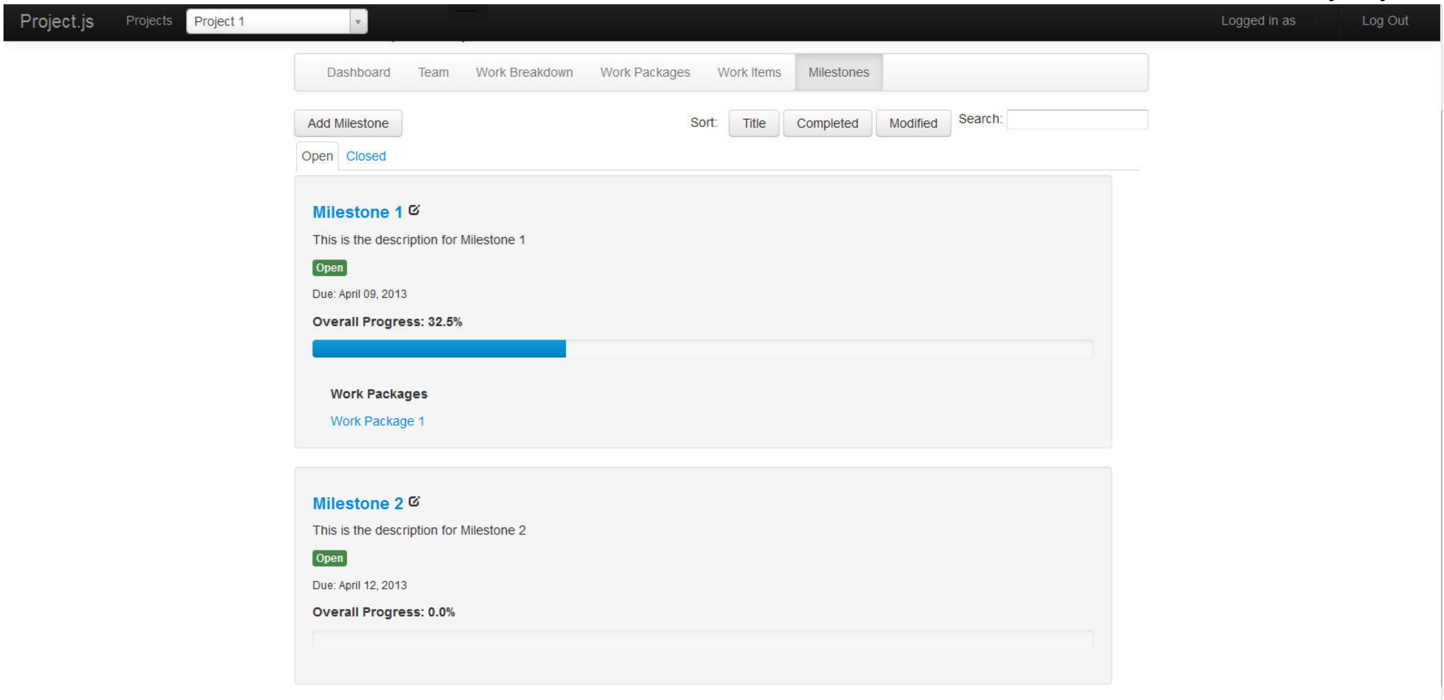

Figure 11 - Milestones

Adding a Milestone

To add a milestone, click 'Add Milestone' at the top left of the milestone list and enter or select the information in the fields provided (title, description, priority, due date, work package dependencies, dependencies on other milestones, status) and click 'Create'. Any required fields are outlined in red when you click on them.

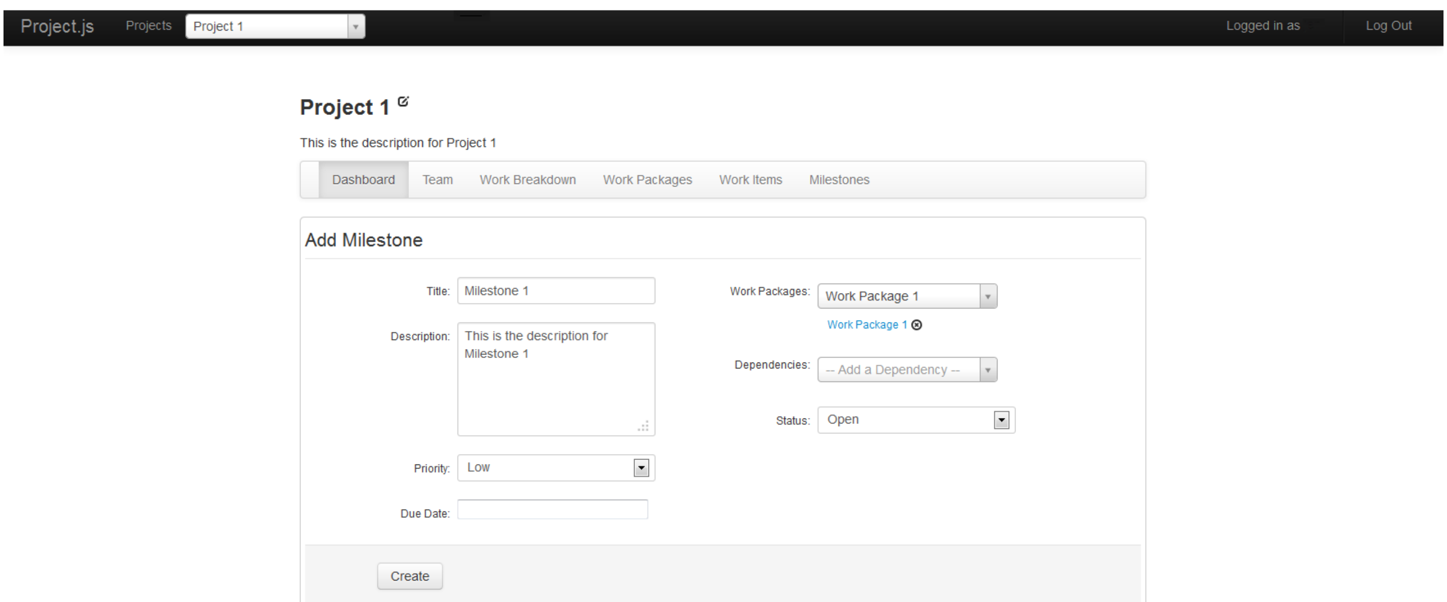

Figure 12 - Add Milestone

Editing a Milestone

To edit the details of a milestone, click on the symbol next to the milestone name (either in the milestone detail page, or in the milestones listing page). Enter or select the new information, and click 'Update'. You will then be directed to the Milestone detail page, which will display the updated information.

Deleting a Milestone

If you need to delete a milestone, click on the symbol next to the milestone name, and select 'deleted' from the status dropdown box.

Closing a Milestone

Once a milestone has been reached, you can close it by clicking on the symbol next to the milestone name, and selecting 'closed' from the status dropdown box.

Viewing a User's Assigned Projects

It is possible to view a list of the projects to which a particular user is assigned by clicking on the user's name on the following pages:

- Projects Page and Project Dashboard, to view projects of users who are project managers
- Team Page- all users assigned to the project
- Work Items list and detail pages, to view projects users who are assigned to a particular work item

A Note on How Completion Percentage is Calculated

Completion percentage is indicated by the user only at the work item level.

A work package's completion percentage is calculated based on the completion percentages of the work items belonging to it, as well as any dependencies it has.

A milestone's completion percentage is calculated based on the completion percentage of its dependencies.

A project's completion percentage is calculated based on the completion percentage of its milestones. If there have not been any milestones added, it is based on the completion percentage of all work packages. If there have not been any work packages added, it is based on the completion percentage of all work items.

Priority is used as a weighting factor, with 'urgent' being highest and 'low' being lowest.