FX-PROJECT ®

OPEN SOURCE

Version 24

fx-project Open Source - Info
BRIEF OVERVIEW

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1 General

fx-project version 24, as of October 2024

1.1 Brief Description

Brief overview of the most important programs and functionalities of fx-project.

Unless otherwise described, instructions always refer to the Ultimate version of fx-project, as it includes all functionalities.

1.2 Imprint

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2 Brief Overview of the Functions

2.1 Program Description

fx-project is a 100% web-based and platform-independent, professional project management software with which you can successfully lead your projects to the goal.

2.2 Highlights of fx-project

2.2.1 Master Data

Contract data

Name, First Name:	**Moore**, Gerald *[GM]*		Religion:	roman catholic
Maiden Name:			Birthday:	05/26/1958
Company Address:	SMPL-PLACE, 123 S	PP/Hrs.: 60.00 €	Entry Date:	01/01/2024
Mobile Area:	Europe	SP/Hrs.: 120.00 €	Leave Date:	

Working Hours/Week: 40.00 Hrs.   Workdays: 5 Day(s)   Mon: ☑ Tue: ☑ Wed: ☑ Thu: ☑ Fri: ☑ Sat: ☐ Sun: ☐

Working Start Time: 08:00 o'clock   Break: 1:00 Hrs.   Work-Hours/Day: 8.00 Hrs.   Work-Time: 08:00-17:00

Yearly Vacation⁻¹ **2024**: 30.00 Day(s)   Add Carry⁻¹ **2024**: 3.00 Day(s)

Bank Code:	IBAN:	
Bank Account No.:	BIC:	

Handicapped: ☐   Flextime: ☑   Time Recording Check: ☑   Time Restriction: ☑

Internal Annotation:

(Figure 1: 7_6, The screenshot may differ depending on the version)

- ➢ Master data for all groups of people involved (customers, suppliers, employees, contractors, etc.)
- ➢ Unlimited collection of address and communication data
- ➢ Skill management of the project participants
- ➢ Distribution of rights and roles of the project participants
- ➢ Individual extension possibility for additional project participants e.g. consultants etc.
- ➢ Integrated personnel master sheet
- ➢ Establishment of departmental structures
- ➢ Extensive search functions for projects, persons, documents, etc.
- ➢ Export and import possibility of all personal data in XML format
- ➢ Various reports

2.2.2　Project Management
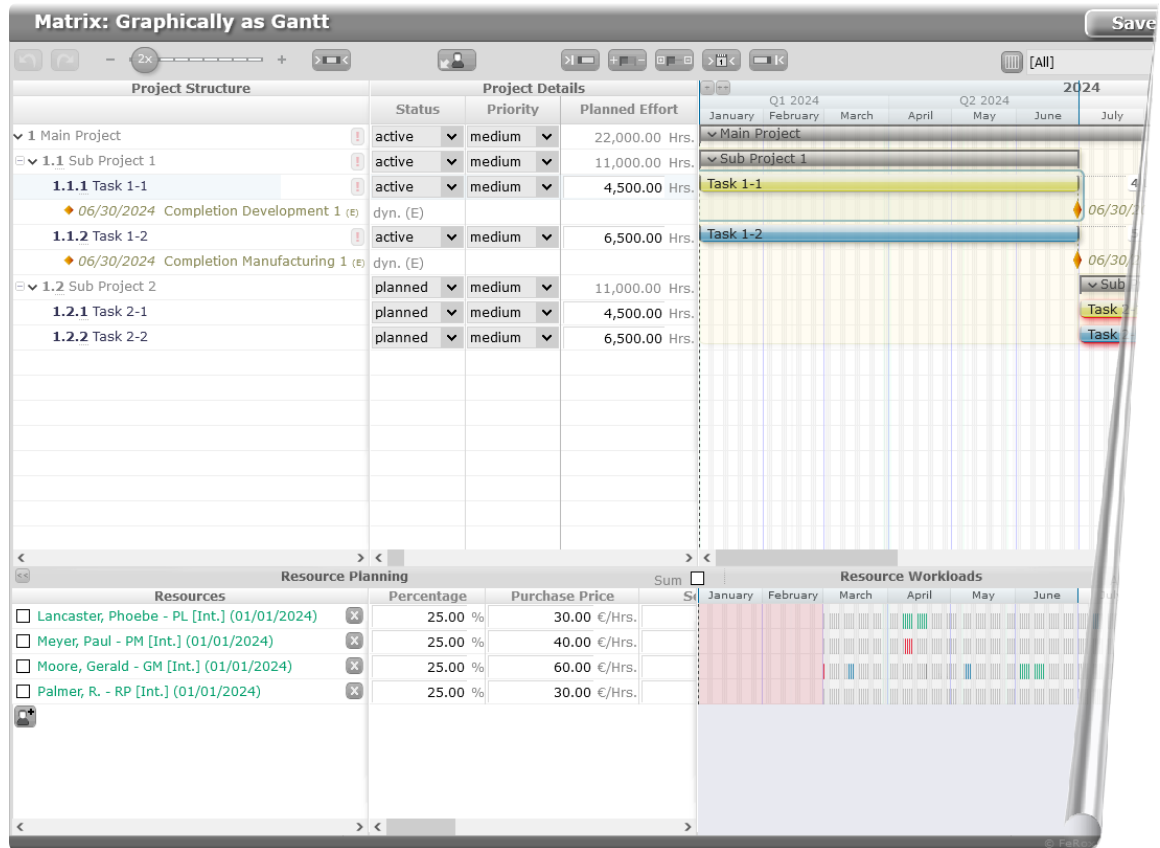
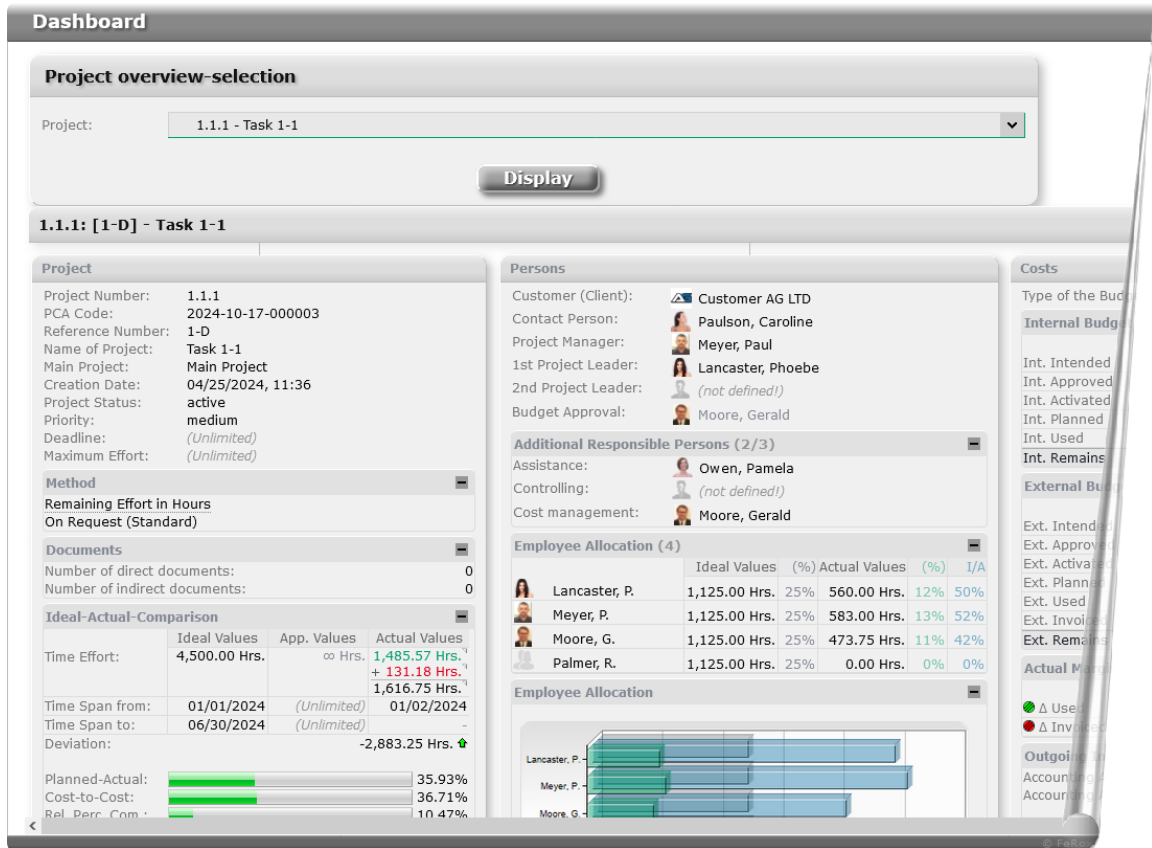*(Figure 2: 189_14, The screenshot may differ depending on the version)*

➢ Manage projects, phases, activities, individual tasks (hierarchies, dependencies, status, deadlines, milestones, efforts (e.g. with internal/external billing rate), responsibility, etc. can be edited via individual mask or matrix).
➢ Graphic project shift
➢ Powerful graphical resource planning incl. workload etc.
➢ Workload graphs people/projects or projects/people
➢ Task-related time recording (incl. travel expenses)
➢ Optional budget approval procedure
➢ Complete project history
➢ Continuous until invoicing
➢ Integrated cost accounting (cost units, cost centers, cost type and activity type)
➢ Import and export function to MS-Project
➢ All common types of project completion notifications and corresponding evaluations

2.2.3 Project-related Time Registration

Tasks	Info				Mo, 04/15		Tu, 04/16		We, 04/17		Th, 04/18		Fr, 04/1
Gerald Moore April 15, 2024 - April 19, 2024	Targ. Hrs. Planned Time Period	Act. Hrs.	Rem. Hrs. Priority		Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	Start Break
1 1.1.1 Task 1-1 > Development [CE-0001]	~1,125.00 h	455.75 h 🟢	725.31 h		09:00	19:00	09:00	16:00	07:00	12:45	07:30	18:15	
	01/01/2024-06/30/2024		medium		0:45	9:15	0:45	6:15	0:30	5:15	0:45	10:00	
2 [Unknown]							16:00	19:00	12:45	14:30			
								3:00		1:45			
3 +1.1.1 Task 1-1 > Development [CE-0001]	~1,125.00 h	455.75 h 🟢	725.31 h		[None]		[None]		[None]		[None]		[None]
	01/01/2024-06/30/2024		medium										
4 +[Unknown]													
Attendance Time From / Until:					09:00	19:00	09:00	19:00	07:00	14:30	07:30	18:1	
Attendance Duration with / without Break:					10:00	9:15	10:00	9:15	7:30	7:00	10:45	10:0	
Total Break / Time Period:	Σ		35:30		0:45	9:15	0:45	9:15	0:30	7:00	0:45	10:0	
Plan Hrs. per Day / Diff. Plan Hrs.:	Σ		40:00		8:00	+1:15	8:00	+1:15	8:00	-1:00	8:00	+2:	

(Figure 3: 83_530, The screenshot may differ depending on the version)

- ➢ Time recording of the employees to the assigned tasks with automatic assignment of the costs
- ➢ Time recording by the week or month
- ➢ Automatic information to project managers when tasks are completed
- ➢ Two-stage time data release (employee/project manager or management or administration)
- ➢ Current data at any time

2.2.4   Project Controlling

(Figure 4: 209_437, The screenshot may differ depending on the version)

- ➢ Very powerful schedule and effort management supports planning and controlling through various diagram types (Gantt, WBS, networks...).
- ➢ Employees and project managers can see the current work progress at any time, which is supported by "traffic light" functions
- ➢ Extensive reporting with thousands of possible variations
- ➢ Graphical project overview with chart diagrams at any project level
- ➢ Time-controlled controlling: project alerts, time recording check
- ➢ Integrated vacation planner with evaluation options
- ➢ Central document management system with integrated version management (DMS)
- ➢ Performance evaluation of the tasks
- ➢ Evaluation of the project indicators
- ➢ Automatic notification by email
- ➢ Request of the degree of completion from project leader at the push of a button

2.2.5 Individuality
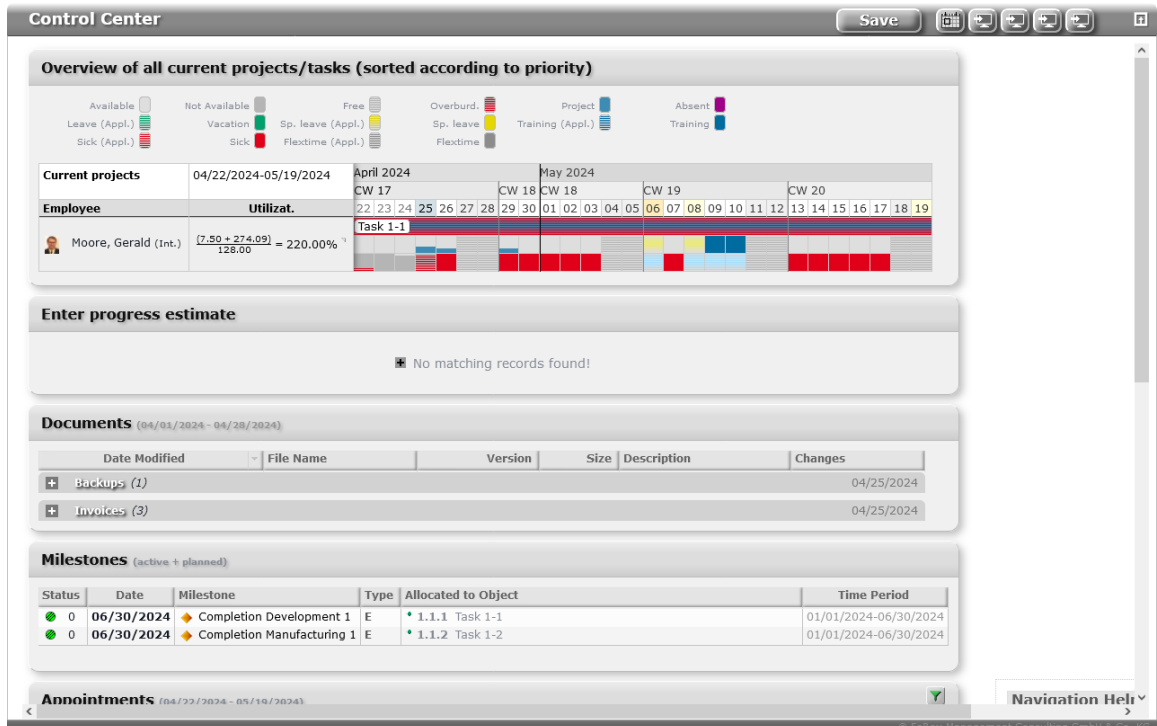
(Figure 5: 14_0, The screenshot may differ depending on the version)

- ➢ Create individual reports without external systems
- ➢ Dynamic, context-sensitive and language-independent help system
- ➢ Multilingual, multi-project and multi-client capable
- ➢ Client-specific design options
- ➢ Comfortable and scalable print preparation in PDF

2.2.6   Invoicing

Edit invoice items

Project	Description	Annot.	Rel.	Invoiced	UP Net	Amount	Unit
Person Costs							
· **P-HB - Per Hour Basis (Persons)**							
1.1.1 Task 1-1	Lancaster, Phoebe		x	0.00 €	60.00	56.00	hrs.
1.1.1 Task 1-1	Meyer, Paul		x	0.00 €	80.00	105.26	hrs.
1.1.1 Task 1-1	Moore, Gerald		x	0.00 €	120.00	62.75	hrs.
1.1.2 Task 1-2	Maddox, Eric		x	0.00 €	40.00	128.45	hrs.
1.1.2 Task 1-2	Mallard-Baker, Elizabeth		x	0.00 €	40.00	136.94	hrs.
1.1.2 Task 1-2	Owen, Pamela		x	0.00 €	50.00	119.00	hrs
1.1.2 Task 1-2	Tanner, Calvin		x	0.00 €	40.00	136.00	hrs
1.1.2 Task 1-2	Tyler, Cindy		x	0.00 €	40.00	119.00	hr
List Travel Costs							
· **TE - Travel Expenses**							
No invoiceable entries found!							
Material Costs							
· **M-IN - Instant (Material)**							
No invoiceable entries found!							
· **M-US - Usage (Material)**							
1.1.1 Task 1-1	Usage Material	M-U-001	●	0.00 €	4.00	15.00	
· **M-TI - Time (Material)**							
1.1.1 Task 1-1	Time Material	M-T-001	●	0.00 €	15.00	9.00	
Additional Costs							
· **AP - Free additional positions without project relations / Discounts or the like with negative amounts**							
+ 1			x	0.00 €	0.00 €	1.00	
⊕ → Add new additional-cost position							

(Figure 6: 104_281, The screenshot may differ depending on the version)

➢ Invoice writing has been simplified even more
➢ Bundling of invoice items possible
➢ Invoicing of a project with several clients
➢ etc.

2.2.7   Absence
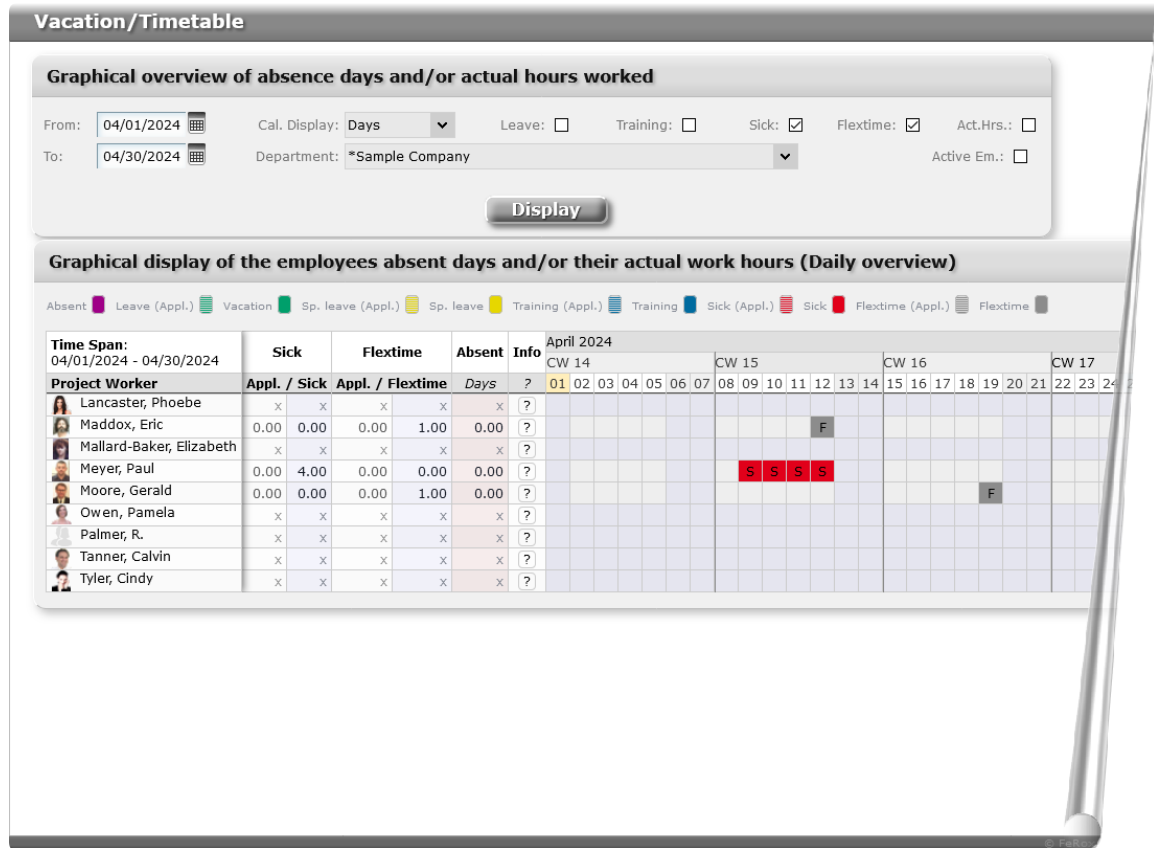
(Figure 7: 92_258, The screenshot may differ depending on the version)

➢   With the absence planning vacation, training etc. can be requested
➢   Approval/rejection by supervisor
➢   Consideration of absenteeism in resource planning, etc.

2.2.8 Access Rights

Manage access rights: Projects
→ 1.1.1 Task 1-1

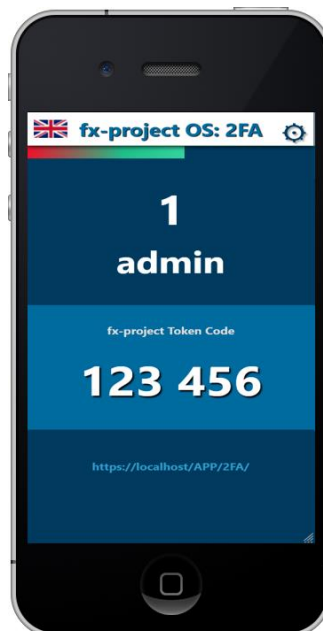| Description	All	Disp.	Crea.	Edit	Del.
User					
Contractor					
☐ Tanner, Calvin [ct1]	☐	☐	☐	☐	☐
☐ Tyler, Cindy [ct2]	☐	☐	☐	☐	☐
Customer - Contact Person					
☐ Paulson, Caroline [ca-cp] *(Customer - Contact Person)*	☐	☐	☐	☐	☐
Employee					
☐ Lancaster, Phoebe [pl] *(Project Leader)*	☐	☐	☐	☐	☐
☐ Maddox, Eric [em1]	☐	☐	☐	☐	☐
☐ Mallard-Baker, Elizabeth [em2]	☐	☐	☐	☐	☐
☐ Meyer, Paul [pm] *(Project Manager)*	☐	☐	☐	☐	☐
☑ **Moore, Gerald** [gm] *(General Manager)*	☑	☑	☑	☑	☑
☐ Owen, Pamela [po]	☐	☐	☐	☐	☐
☑ **Palmer, R.** [rp]	☑	☑	☑	☑	☑
User Profile Group					
☐ 00 Open Source	☐	☐	☐	☐	☐
☐ 01 Project Matrix + Skill Manager	☐	☐	☐	☐	☐
☐ 02 Project Extensions	☐	☐	☐	☐	☐
☐ 03 Time-Registration Extensions	☐	☐	☐	☐	☐
☐ 04 Travel Expenses	☐	☐	☐	☐	☐
☐ 05 Material	☐	☐	☐	☐	☐
☐ 06 DMS	☐	☐	☐	☐	☐
☐ 07 Invoicing	☐	☐	☐	☐	☐
☐ 08 Security	☐	☐	☐	☐	☐
☐ 99 Everything	☐	☐	☐	☐	☐
Department					
☑ **A: Personnel Department**	☑	☑	☑	☑	☑
☐ B: Financial Department	☐	☐	☐	☐	☐
☐ C: Production	☐	☐	☐	☐	☐
☐ C-A: Development	☐	☐	☐	☐	☐
☐ C-B: Manufacturing	☐	☐	☐	☐	☐

(Figure 8: 192_351, The screenshot may differ depending on the version)

- ➢ Role-related function rights (menu)
- ➢ Targeted access definition for programs and data
- ➢ Flexible model - from Community, to Professional, to Ultimate

2.2.9 Security

2FA-Device-IDs

User Name	?	2FA Device ID	Changed by	
Moore, Gerald "GM"				
gm	🟢	0000000000-0000000000-0000000000-0000000000	Moore, Gerald *(04/25/2024, 08:22)*	❌
	🟡		+ Add new Device-ID	
Smith, John				
admin	⬦	0000000000-0000000000-0000000000-0000000000	Moore, Gerald *(04/25/2024, 08:23)*	
	🟢	9999999999-9999999999-9999999999-9999999999		❌
	🟡		+ Add new Device-ID	

🇬🇧 **fx-project OS: 2FA** ⚙

1
admin

fx-project Token Code

123 456

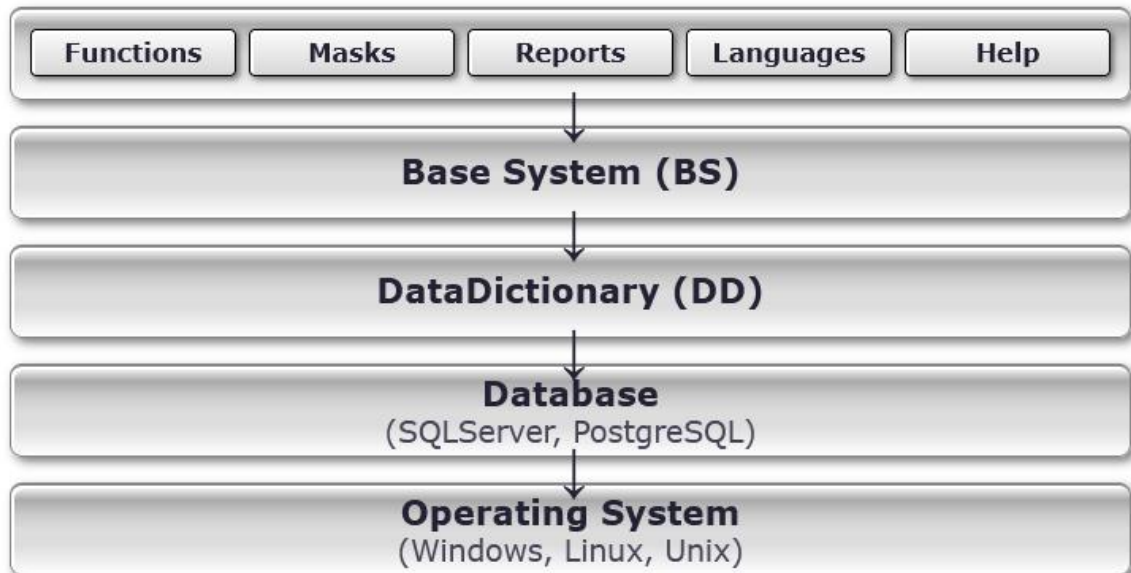https://localhost/APP/2FA/

(Figure 9: 284_551/GFX, The screenshot may differ depending on the version)

- ➢ Optional 2FA (2-Factor-Authentication)
- ➢ Individual installation-dependent encryption, i.e. no two installed versions use the same key

2.3 Architecture of fx-project

(Figure 10: GFX, The screenshot may differ depending on the version)

- Microsoft Windows ®, Linux, Unix, ...
- Microsoft SQL Server ® + PostgreSQL
- Browser-independent, since pure HTML is generated with JavaScript (thus minimal problems with firewalls)
- Interfaces to Outlook ®, MS-Project ®, MS-Excel ® etc.
- Extensive import and export functions

2.4   Versions / Costs

Due to the good customizing options, fx-project can be very easily adapted to your own CI.

fx-project Open Source is available in three versions:

Community

Open source basic version, free of charge without extension packages (without fx-project license for ChartDirector)

The community version of fx-project Open Source is completely free of charge and already offers all the necessary functionalities for comprehensive project management, including time tracking, absence planner, reports, etc.

Professional

Open source basic version + at least one purchased extension package (includes fx-project license for ChartDirector)

A community version can be upgraded to a professional version at any time by purchasing at least one extension package from the manufacturer FeRox Management Consulting GmbH & Co. KG, e.g. the cost-effective matrix package to enable even easier project planning and much more.

Furthermore, by purchasing a package, the trial version of the graph charts created using "ChartDirector" will also be converted to a full version, i.e. the yellow trial version bar at the bottom of the charts will disappear without you having to purchase a full version of ChartDirector.

Ultimate

Open source base version + all purchased extension package (includes fx-project license for ChartDirector)

The Ultimate version is a community version with all available extension packages, i.e. this version offers the most extensive functionalities.

More information can be found on the homepage at https://www.fx-project.org.

2.4.1 Purchase - Expansion Packages

The extension packages to be purchased are usually interesting for all company sizes, especially the matrix extension package for tabular input and management of projects. As a bonus, each extension package includes a fx-project license for ChartDirector.

Otherwise, the extension packages are designed for companies with special requirements such as DMS, material management or invoice writing.

2.4.2   Rental Version (SaaS - Software as a Service)

The rental version has the advantage that the customer does not have to worry about software updates or hardware. His data is backed up regularly and can be restored by the customer himself (restore a backup) without affecting other SaaS customers.

The customer has his own client with all activated program functions of the Ultimate version. In contrast to the open source version, additional security precautions are integrated here, as well as all program functions are coded.