



Manual Update

What's new in Version 4.1.5

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Preliminary Remarks

This document offers an overview of the new functions in version 4.1.5 of our project management software *Can Do project intelligence* compared to version 4.1.

Overview of changes:

- **Assignment of resources on a percentage basis**
- **Budget management**
 - Determining the position of a resource assignment
 - Changing the budget position for multiple objects
- **Improvement of usability**
 - Moving projects
 - Connectors (linking)
 - Fixed linking
 - Dates for activities
- **Expansion of Reporting (PDC)**
 - Sampling client parameters
 - New attributes
- **Portfolio management**
 - Graphical presentation of probability of proposals (project concepts)
 - Status and degree of progress of project portfolios
 - Activation of portfolio manager licence
- **Project number custom field**

Assignment of Resources on a Percentage Basis

Assignment of Resources with a given Percentage

Starting with version 4.1.5, the Can Do administrator now has the option of determining the percentage during the first assignment of resources (meaning staff and departments). If s/he, for example, sets this percentage to 50%, every resource will initially be automatically assigned 50%. Afterwards, the user is able to adjust the assignment according to the plan.

Up until now, resources were by default assigned with 100% to project objects.

Determining the Percentage

Various settings need to be changed to activate this function: The desired percentage shall be entered into the file "client.properties" in the *dist*-folder under "resourceAssignDefaultValue".

```
# New Resource Assginments will be assigned with this percentage.
# If no value or a pointless value is specified, then 100.0 is used.
resourceAssignDefaultValue = 50.0
```

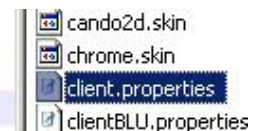


Illustration 1: Adjusting the client properties file

Budget Management

Determining the Position of a Resource Assignment

Starting with version 4.1.5, it is now possible to assign different budget positions to resources assigned to the same project object. At the first assignment of resources to a project object, resources will automatically "inherit" the position of the object. In the following example, the work package has been defined as position 1, and the two resources Müller and Huber have accordingly been assigned the same position (see illustration).

Costs					
Resource Costs		Fixed Costs			
Resource	Activity Type	Price	Planned Costs (€)	Position Number	Inherited
Krull, Felix	Senior	243,75 EUR	58.500,00 EUR	1	<input type="checkbox"/>
Mann, Manfred	Senior	243,75 EUR	76.050,00 EUR	1	<input type="checkbox"/>
Total:			134.550,00 EUR	1 2	

Illustration 2: Determining the position of assigned resources

The project manager is now able to change the position of Manfred Mann, for example, from 1 to 2, if s/he deletes the tick in the "inherited" column and selects number 2 in the position number drop-down list.

New Features in Can Do project intelligence 4.1.5

Changing the Budget Position for Multiple Objects

If multiple project objects have been selected, their position can be changed at the same time: A pop-up menu appears when right-clicking on the interface, simply select the item “change position number” here.

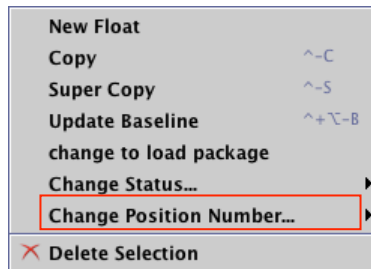


Illustration 3: Changing the position for multiple objects

Improvement of Usability

Moving Projects

Moving individual projects within the programme and project list (using drag & drop) has been made easier with the "Scroll Corners". Just move the cursor to the upper or lower “scroll corner” (in grey) and scrolling through the programme and project list while moving projects becomes faster.

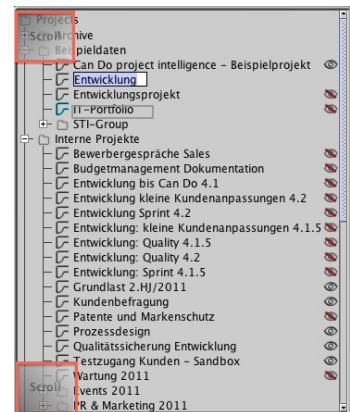


Illustration 4: "Scroll Corners"

Connectors

As in earlier versions, clicking on the “Connector“ symbol (intertwined rings) creates a linking (cursor changes into a cross). The user is then able to connect two objects as before. After creating the link, the cursor stays in the shape of a cross

and it is possible to connect additional objects with each other.

For deactivating the linking function just right-click on the user interface or click on the “Manipulator“ symbol in the tool bar (standard cursor).



Illustration 5: Manipulator, magnifier and connector

New Features in Can Do project intelligence 4.1.5

Fixed Linking

If a fixed time interval has been entered during the linking of two project objects and one of the two linked objects is moved, the tool tip will show the current time interval in relation to the entered interval.

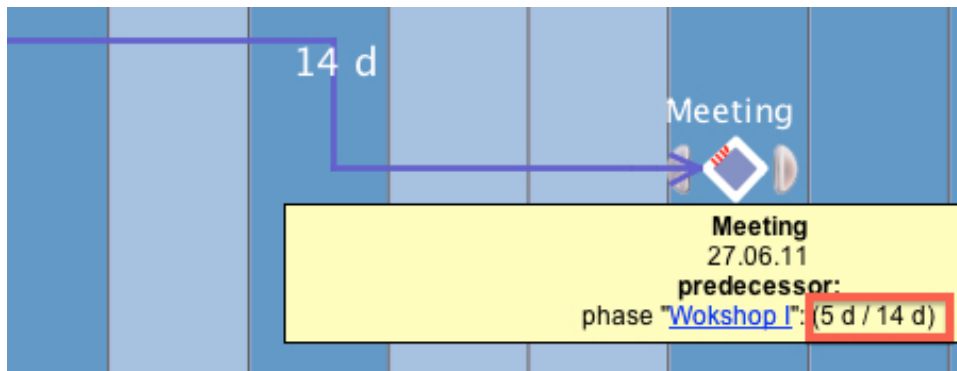


Illustration 6: Fixed linking tool tip

Dates for Activities

If multiple activities have been entered for the same day in a work package and at least one but not all of those activities have been marked as completed, this becomes visible in the graphical presentation: The funnel symbol stays yellow and green (blue in the standard skin) until all activities have been completed. As soon as all activities scheduled for this day are done, the symbol turns green (blue).

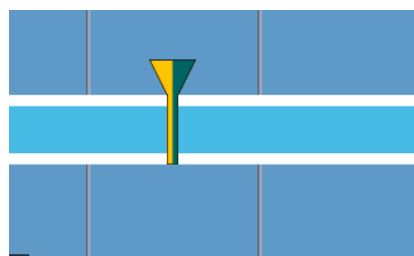


Illustration 7: Presentation of dates for activities

Expansion of Reporting (PDC)

Sampling Client Parameters

Starting with version 4.1.5, information regarding the user (author) and the filters in reports used in the client can be presented in the form of a header. The following elements can be included in the presentation:

- Author (person creating the report)
- Time period
- Selected projects (objects)
- Selected resource (or department)
- Creation date (incl. time of day)

Objektname	PSP Nr.	Status	Start	Ende	Dauer	Fortschritt	Risiko	Arbeit geplant	Arbeit gemeldet	verbleibende Arbeit
Vorarbeiten	1	abgeschlossen	13.05.11	31.05.11	13,00 T	100,00 %	0,00 %	0,00 Std.	0,00 Std.	0,00 Std.
WaterModel Zero	1.1	abgeschlossen	13.05.11	17.05.11	3,00 T	100,00 %	0,00 %	12,00 Std.	12,00 Std.	0,00 Std.
Neue Hilfe/Video Technik	1.2	abgeschlossen	13.05.11	17.05.11	3,00 T	100,00 %	0,00 %	25,80 Std.	25,75 Std.	0,05 Std.
Sprint Rahmen festlegen	1.3	abgeschlossen	27.05.11	27.05.11	1,00 T	100,00 %	0,00 %	4,00 Std.	4,00 Std.	0,00 Std.

Illustration 8: Report example

New Attributes

Furthermore, the PDC language has been expanded to include the following attributes:

ra.orderitem
ra.myeffort
pmo.myeffort

For details, please refer to the 4.1.5 PDC manual.

New Features in Can Do project intelligence 4.1.5

Portfolio Management

Graphical Presentation of Probability of Proposals

It is possible for an occurrence probability for planned projects to be indicated in the extracted project portfolio information window, which is also displayed graphically.

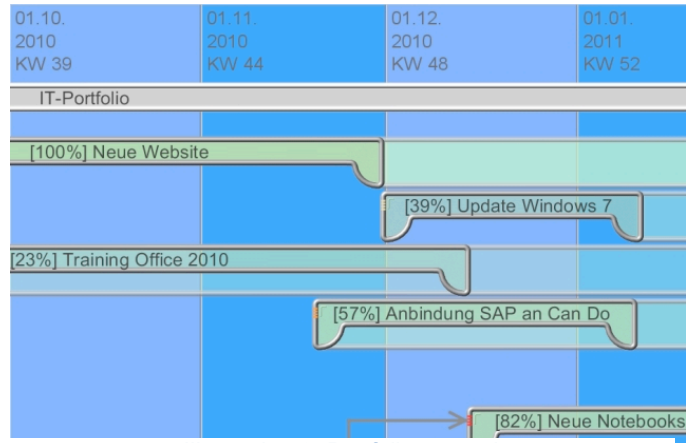


Illustration 9: Portfolio example

Status and Degree of Progress of Project Portfolios

Portfolios as well as projects have a status (planned, started, running, done) and a degree of progress. This can be calculated from the progress of the proposals inside the portfolio and the active projects (aggregation of progress values on portfolio level), and displayed graphically.



Illustration 10: Degree of progress of a portfolio

Activation of Portfolio Manager Licence

Starting with version 4.1.5, portfolio manager privileges made available on a provisional basis to owners of project manager licences are going to be reduced. Users with a project manager licence will now only have portfolio reading privileges (viewer privileges). Creating, planning and managing project portfolios will only be available to users with a corresponding portfolio manager licence.

In the upcoming 4.2 version, the project manager licence will also be losing the portfolio reading privilege (viewer).

Project manager licences can be updated on demand, please ask your Can Do contact person.

Project Number Custom Field

Can Do project intelligence is able to automatically generate a number for a distinct association of projects. This project number

- has six digits (such as 110001 – the first two numbers correspond to the year, the remaining four numbers are consecutive)
- is generated automatically when creating a project
- is displayed in the core data of a project
- cannot be changed (read-only)
- is evaluable in reports

This function is deactivated by default. To be able to use this feature, the Can Do administrator has to create a new "Project Number" custom field using the *DBAdminGui* ("CandoCustomizer") and define the type as follows:

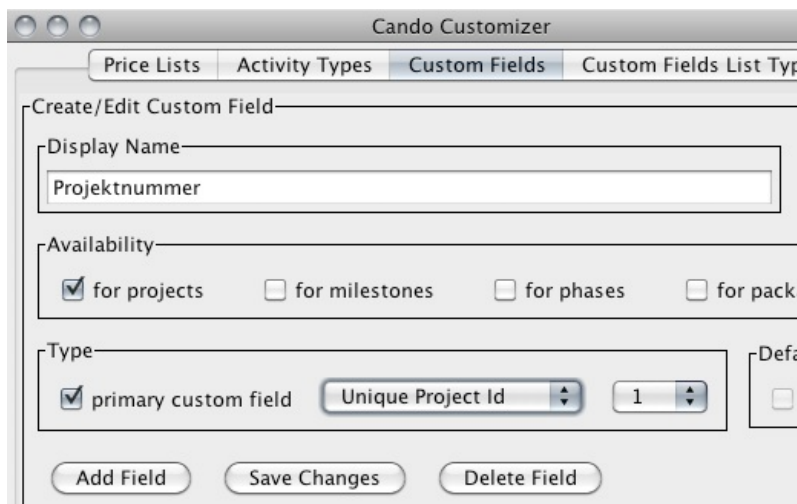


Illustration 11: Creating a "Project Number" custom field using the DBAdminGui