

Task oriented Enterprise 2.0 community tool

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Table of Contents

1.Introduction.....	2	4.1.1.View personal task list.....	8
1.1.Goal.....	2	4.1.2.View TODO list.....	8
1.2.Problems to be solved.....	2	4.1.3.View personal calendar.....	8
1.3.Synopsis	2	4.1.4.View private tasks.....	8
2.Entities.....	3	4.1.5.Create private task.....	8
2.1.Product level.....	3	4.1.6.View projects the user is involved in. 8	
2.2.Time line.....	3	4.1.7.View project info.....	8
2.3.Product	3	4.2.Resource manager.....	8
2.4.Workflow.....	4	4.2.1.Report on team effectiveness.....	8
2.5.Task.....	4	4.2.2.Assign resources to a project.....	8
2.6.Resource type.....	4	4.3.Administrator.....	8
2.7.Resources.....	5	4.3.1.Manage templates.....	8
2.8.Calendar.....	5	4.4.Project member.....	9
2.9.Overviews.....	5	4.4.1.Generate an exception.....	9
2.10.Templates.....	6	4.5.Program manager.....	9
3.Roles.....	7	4.5.1.Create program.....	9
3.1.User.....	7	4.5.2.Manage program.....	9
3.1.1.User: Resource manager.....	7	4.5.3.Close program.....	9
3.1.2.User: Administrator.....	7	4.6.Project manager.....	9
3.2.Project member.....	7	4.6.1.Startup project.....	9
3.2.1.Project member: Program manager. .7		4.6.2.Manage project.....	9
3.2.2.Project member: Project manager....7		4.6.3.Close project.....	9
3.2.3.Project member: Team manager.....7		4.7.Team manager.....	9
3.2.4.Project member: Specialist.....7		4.7.1.Deliver work packages.....	9
4.User stories.....	8	4.8.Specialist.....	10
4.1.User.....	8	4.8.1.Execute a task.....	10

1. Introduction

1.1. Goal

Make working together easier and more controlled.

1.2. Problems to be solved

- email
- work logging
- task assignment
- insight in what somebody is doing
- personal time management

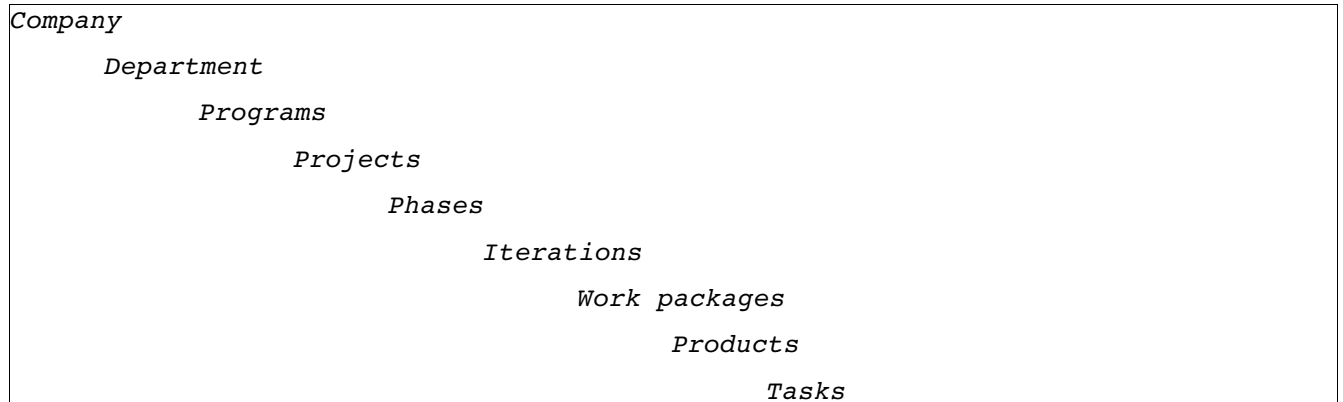
1.3. Synopsis

A system that enables the sending of tasks to a closed group of people working together on a project. Tasks should be placed in a calendar and executed within the project environment as much as possible. A task should always result in a product. Task are part of a workflow that is attached to the product it should deliver.

2. Entities

2.1. Product level

Each product describes a level in the development structure. The structure of the levels must be changeable, but the default is described below. Tasks always form the end nodes of the structure.



It must be possible to set permissions on CRUD in the levels. For example: a specialist is not allowed to create products on the Company level.

2.2. Time line

A time line defines the start- and end dates for a product. Creating a product automatically creates a time line. Sub products and tasks are placed in the time line of the parent product.

Examples of use:

In a program the time line will define when the program starts and ends. It will also define when projects defined in the program will start and end.

In a project the time line defines the start and end of the project, but also the start and end of the project phases.

Within phases the iterations must be placed in a time line, work packages in an iteration, etc.

2.3. Product

A product can consist of multiple products. A main product may be called a program, a project, a sub-product a work package, underneath a work package a product. A product contains a time line and a workflow.

A product contains:

- Type of product (project plan, portal, technical design, ..., editable list)
- Level of the product (product level)
- Title
- Description
- Responsible, the resource (person) that is responsible for this product.

- Dependencies, product(s) that this product depends on
- Resources available to create the product. The project cost for the resource is the "Default external cost", but this can be changed when a resource is assigned to a project.
- Permission for each resource type
- Budget available to create the product. (limited visibility: RM, PM)
- Amount of hours available to create the product. (limited visibility: RM, PM, TM)
- Workflow
- Time line for the sub products or tasks

2.4. Workflow

A workflow is a flow of tasks. The workflow must support sequential and parallel tasks. The workflow defines when the product is completed. Each workflow contains at least three statuses:

1. Created
2. Completed
3. Can't complete

For each status change it must be possible to define a default assignee. Based on the resource type, for example: "Can't complete is always assigned to the team manager".

A workflow contains:

- Title
- Description
- Possible statuses and their flow
- (Optional) Default assignee per status

2.5. Task

A task is a load of work that should be executed.

A task contains:

- Type: Coding, writing, free day(s), ... (editable list)
- Title
- Description
- Private or public
- Resource that should execute the task
- Resources required for the task (for example: multiple people, meeting room, ...)
- Amount of time available to execute the task (can be infinite)
- Workflow status: created, assigned, in progress, completed, can't complete
- Dependencies

2.6. Resource type

A resource type contains:

- Title
- Description
- Type: people, rooms, projectors, computers, ... (editable list)
- Sub type:
 - People: Resource manager, project manager, team manager, functional analyst, technical analyst, technical lead, ...(editable list)
 - Rooms: Project room, meeting room, hotel room, ... (editable list)
 - Computers: Laptop, desktop, server, ...(editable list)
- Internal/external, this means: supplier or client. Mainly used for permissions.

2.7. Resources

People, rooms, beamers, servers, ...

A resource contains:

- Type
- Title
- Description
- Internal cost (limited visible, only RM, PM)
- Default external cost (limited visible, only RM, PM)

2.8. Calendar

The calendar contains an overview of tasks in time. The assignee should be able to place tasks in it's personal calendar from NOW until the task must be finished according to time line.

A calendar contains the usual calendar settings:

- Views: day, workweek, week, month, year, ...
- Week numbers (American, European, ...?)
- Show calendars of multiple resources
- Drag and drop tasks
- Double click to edit task

2.9. Overviews

It should be possible to create the following overviews.

- Gant chart
- Time line overview
- Product status (sub-products and tasks in the workflow and their status)
- Task status
- Hours taken to complete a product
- Hours taken to complete a task
- Product budget (can be any product: program, project, etc.)
- Active products (select a level)

- Budget, hours
- Completed products (select a level)
- Budget, hours
- Active tasks (select a level)
- Budget, hours
- Completed tasks (select a level)
- Budget, hours
-

2.10. Templates

Templates for all entities.

3. Roles

3.1. User

A User is a general user of the system.

3.1.1. User: Resource manager

Is responsible for the assignment of resources to projects.

3.1.2. User: Administrator

Administers the tool.

3.2. Project member

A User that is a part of a project

3.2.1. Project member: Program manager

Leads the program

3.2.2. Project member: Project manager

Leads the project

3.2.3. Project member: Team manager

Leads the team that executes the tasks.

3.2.4. Project member: Specialist

Executes a tasks and delivers a (part of a) product

4. User stories

4.1. User

4.1.1. View personal task list

An overview of tasks that are assigned to the user, but have not been placed in the calendar.

4.1.2. View TODO list

An overview of tasks that are next to be executed from the calendar.

4.1.3. View personal calendar

Show the calendar

4.1.4. View private tasks

For each user there is a special product called "Private". The user is responsible for this product and is able to create tasks for it. These tasks can only be assigned to the user itself (?).

The user is able to view all tasks in its own Private product. The goal of this is to get an overview of free days, time spent on off-work tasks (doctor, dentist, lunch, ...).

4.1.5. Create private task

Create a task in the private product.

4.1.6. View projects the user is involved in

Show all the projects that have the user as a resource. This might be: only when a project has a certain workflow status (Started?) to avoid discussions about resource assignments.

4.1.7. View project info

title, description, project manager, etc.

4.2. Resource manager

4.2.1. Report on team effectiveness

Amount of time available for a task – the amount spent on a task.

4.2.2. Assign resources to a project

Receive a project resource request

Enter a period for which resources are required

Enter the type, level and amount of resources that are required

Show the resources that are available in the requested period. Highlight the resources that have the required type and type.

Enable the selection of the available resources for a project.

4.3. Administrator

4.3.1. Manage templates

4.4. Project member

4.4.1. Generate an exception

If a project member signals a problem in the execution of the project then he can raise an exception. The exception is a task for the project manager to handle.

4.5. Program manager

4.5.1. Create program

Select program template

Set time line

Create/edit/delete projects from templates

Set time line

Request resources

4.5.2. Manage program

Change workflow of the program (to: Running?)

Update time line

Generate reports

Handle exceptions

4.5.3. Close program

Change the workflow of the program (to: Completed?)

4.6. Project manager

4.6.1. Startup project

Change workflow of the project (to: Started)

Verify time line and template

 If required: request changes at program manager

Create/edit/delete products from templates

 If required: request templates at Administrator

Request resources

4.6.2. Manage project

Change workflow of the project (to: Running?)

Update time line

Generate reports

Handle exceptions

4.6.3. Close project

Change the workflow of the project (to: Completed?)

4.7. Team manager

4.7.1. Deliver work packages

Create/edit/delete tasks for products

Assign tasks to resources

Check progress on work packages

4.8. Specialist

4.8.1. Execute a task

Put task in calendar

Work on task

Tell the system that the task is completed

OR

Tell the system you can't complete the task

Give a reason