

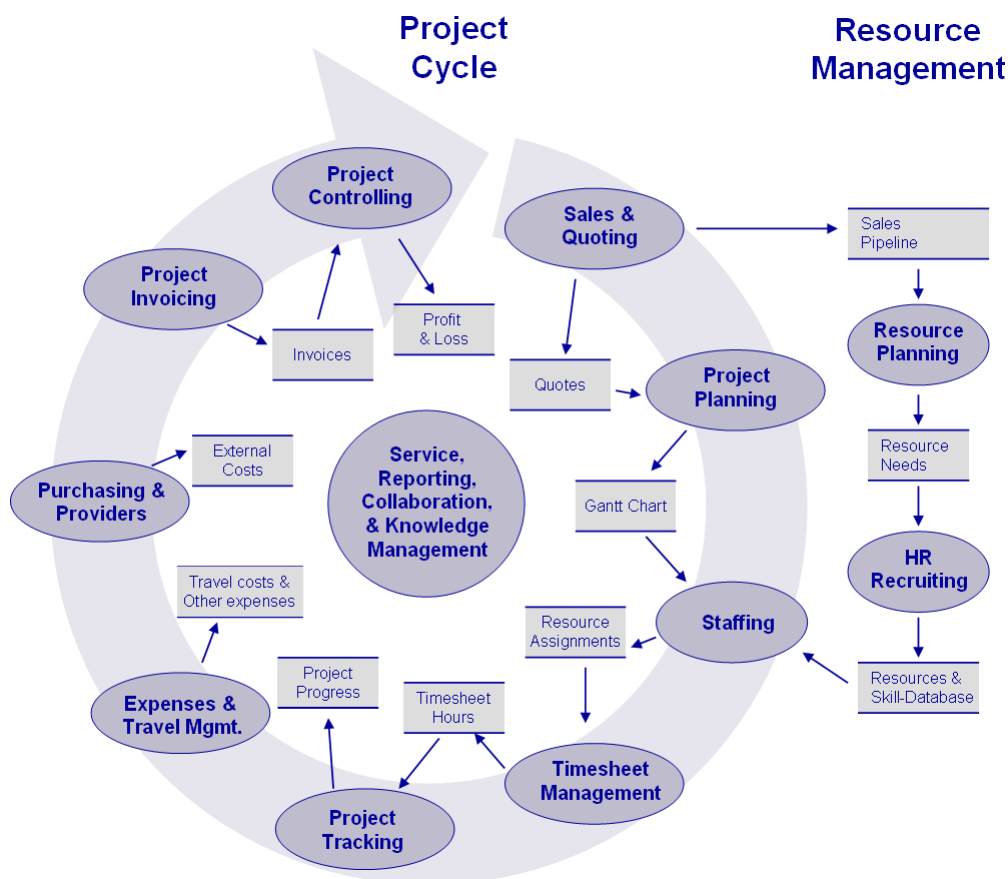
# ]project-open[ for Project- and Service Companies

]project-open[ is an open-source project- and service-management solution for service companies with 3–3000 employees, covering areas such as sales, CRM, project planning, project tracking, help desk and service management, collaboration, timesheets, finance and invoicing.

]po[ allows these companies to grow, reduce overhead costs, and consolidate processes.

## Problems Solved

- Project run time and cost overruns
- Lack of centralized, easily accessible information about projects and customers.
- Senior management lacks information about open projects and their performance.
- Only part of the delivered service time can be billed to the customer.
- Project invoicing is time-consuming and involves senior management.



*Illustration 1: The project cycle — ]po[ supports all important processes and provides an integrated solution for managing all aspects of project execution.*

## ]po[ Benefits

- Up-to-date information about all running projects and project progress

- Early alarms when projects are running over time or budget
- Improved project visibility and insight into the factors driving project performance
- Project and customer information of all types is easily available and accessible
- Being open-source, ]po[ provides fast ROI, both for small- and medium- sized companies.

## ]po[ Support for Project Processes

]project-open[ comes with support for the following processes. Each process is implemented according to best project-management practices. Different parameters control the particular process configuration for each customer:

- Sales & Quoting – tracking customers and quotes
- Project Planning – defining what should be done
- Project Staffing – assigning project resources
- Timesheet Management – collecting resource hours spent
- Project Tracking – comparing progress with plan
- Travel & Expenses – reimbursing employee expenses
- Purchasing & Providers – tracking external project costs
- Project Invoicing – create invoices for delivered services
- Project Controlling – determine profit & loss per project and customer
- Resource Planning – assign resources to future projects
- Recruiting – identify and qualify resources
- Collaboration & Knowledge Management – identify and disseminate knowledge

In the following sections, we will briefly present each process. For more detailed information please click on the embedded links.

## Sales & Quoting

Sales and quoting refers to the acquisition phase of a project. Sales rep and pre-sales consultants capture customers' needs, define the scope of the project, and generate quotes for the project.

]project-open[ supports the sales process by tracking quotes to different customers, together with their probability and their volume ("sales pipeline"). This information makes it possible to forecast future sales and resource requirements. ]po[ also includes contact and campaign management, which lets users consolidate all sales information into a single database.

## Project Planning

Project planning refers to the elaboration of a project schedule, a resource plan and other project-related planning documents.

]project-open[ supports project planning by project hierarchies of any level and serves as "team server," providing all project team members access to project schedules imported from applications including GanttProject, OpenProj and MS-Project (via GanttProject). File storage, discussion forum and survey packages let users store project documents (risk analysis, stakeholder analysis, and the like) and to track their completion.

## Project Staffing

Project staffing refers to the selection of suitable personnel for a given project plan.

]project-open[ supports staffing by providing skill and qualification information per resource from the HR recruiting process. Vacation days, sick leave, and other absences, as well as

assignments to other projects, are visible in real time.

## **Timesheet Management**

Timesheet management is used to capture and analyze employee time spent on projects and project tasks. It provides important input to other processes including project tracking, controlling, and invoicing.

]project-open[ provides a user-friendly interface for employees and freelancers to log their hours and allows project managers to approve logged hours via a configurable workflow. It allows PMs and senior managers to analyze hours spent according to a wide range of variables.

## **Project Tracking**

Project tracking refers to the project manager's task of comparing project progress with the budget and resource consumption in order to detect time or budget overruns early in the project.

]project-open[ supports capturing resource consumption via a number of different packages, ranging from timesheet management to travel cost and freelancer management. This information, together with completion information on the task level, is visible in real time to the project manager and other stakeholders, allowing for maximum transparency.

## **Travel and Expense Management**

Travel and expense management deals with reimbursing small expenses that employees have incurred for the company.

]project-open[ provides employees with a user-friendly interface for capturing expenses. A dynamic workflow controls the approval of expenses by project managers and the HR department. Approved expenses are assigned to their respective projects.

## **Purchasing and Provider Management**

Purchasing and provider management deals with external project costs that may be relevant for investment accounting.

]project-open[ supports the purchasing process with a provider master that includes the transaction history with the provider and information about the quality of delivered products and services. Approval processes for larger purchases can be implemented via approval workflows related to a purchasing project. Import and export interfaces exist to support integration with accounting applications.

## **Project Invoicing**

Project invoicing refers to the creation of customer invoices based on services delivered, travel expenses and other billable items, according to the project contract and other agreements.

]project-open[ supports project invoicing via an invoicing wizard that lets users select invoiceable hours per task and time period. Invoiced hours are marked as such and associated with an invoice, making it possible to track unbilled services. ]po[ supports invoicing of fixed price, time and material, as well as periodic and mixed types of project invoicing.

## Project Controlling

Project controlling refers to analysis activities that determine a project's profit and loss (P&L) and to analyze P&L depending on a number of variables.

]project-open[ makes it possible to collect all P&L-related costs in a consistent way, and to show P&L figures together with each project in real time. A data warehouse cube lets users analyze P&L according to a variety of factors. In particular, user-defined custom fields for individual projects and companies are automatically available as dimensions in the data warehouse.

## Resource Planning

Resource planning deals with mapping resource requirements from sales processes to existing resources, taking into account skills and availability.

]project-open[ supports the resource-planning process by providing information about the resource requirements from planned projects and lets users compare the resource demand with available resources.

## Recruiting

Recruiting deals with the acquisition of personnel and the maintenance of their skills and qualifications.

]project-open[ supports an extended recruiting process, making it possible to treat external personnel just like internal resources. A configurable skill database lets HR managers quantify resource skills. An RFQ package lets project managers efficiently check the availability of large numbers of external personnel for specific projects.

## Collaboration & Knowledge Management

Collaboration and knowledge management (C&KM) refers to a variety of activities related to the collection and dissemination of information within the organization.

]project-open[ supports C&KM using a large number of packages including file storage, discussion forums, Wiki, surveys etc. A full-text search engine lets users query these knowledge resources; meanwhile it observes the user's access permissions to project- and customer-related information.

## Business Intelligence & Reporting

Business intelligence and reporting deal with the extraction of statistics about all the above processes.

]project-open[ supports this process using a variety of packages ranging from a display of operational information and predefined reports to data warehouse and performance indicators.