SOVELIΛ

User Guide
Project Control

SYMETRI
ADDNODE GROUP

Contents

1 Introduction

This section describes SOVELIA Project Control features. The system provides you with an easy way to use SOVELIA in order to control the progress and deliverables of the project.
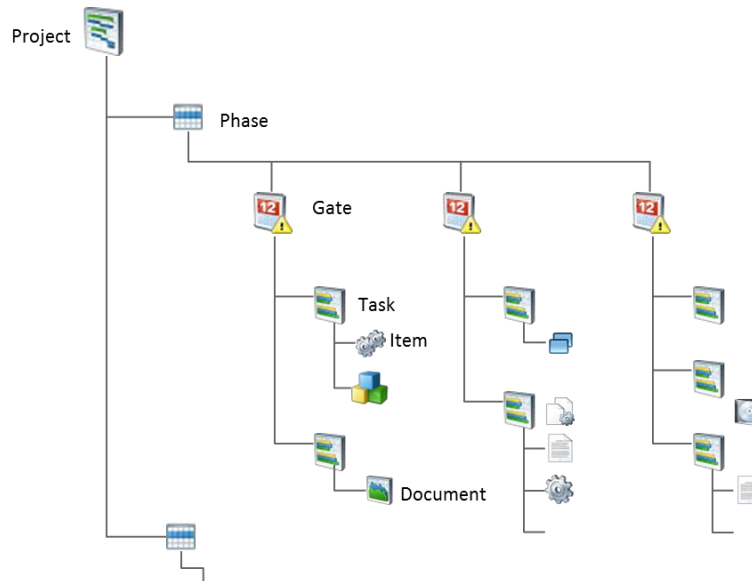
2 Principles

2.1 Lifecycles and rules

The project lifecycle follows the same steps for each object type in the project hierarchy; Project, Phase, Gate or Task. The general definition 'Project object' is used to refer to any of these object types.

The states for project objects are:

CRE – Created	The project object is created in SOVELIA. No activities are done or responsibilities defined.
ASSG – Assigned	Responsibilities defined and project object assigned to a specific user.
ACT – Active	Indicates that work has started.
COMP – Completed	Indicates that work related to the object is complete.
ARC – Archived	Project information is archived.

Project lifecycle rules:

Lifecycle rules are setup for Projects. When you change a status of an object in a project structure the system checks that the status of related objects follows the defined rules. You will receive messages when you break these rules.
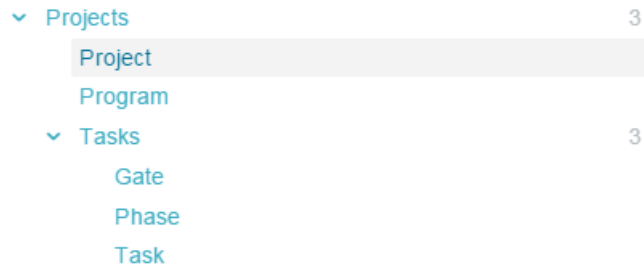
Project object	Project object in project strcuture					Document linked project object		
	CRE	ASSG	ACT	COMP	ARC	DRF	RDY	OBS
CRE	✔	✔	✔	✔	✔	✔	✔	✖
ASSG	✖	✔	✔	✔	✔	✔	✔	✖
ACT	✖	✔	✔	✔	✔	✔	✔	✖
COMP	✖	✖	✖	✔	✔	✖	✔	✖
ARC	✖	✖	✖	✖	✔	✖	✔	✔

Table: Lifecycle rules when promoting a project object.

2.2   Project data

Project data is defined in the Basic and Additional tabs of the Object Window.
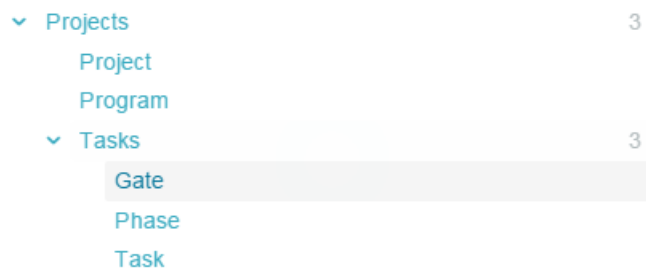
- Projects are located in 'Projects/Project' type

- Mandatory information are marked with *:

  - ID   Project number, typically generated automatically based on predefined series

  - Revision   Project revision, typically generated automatically based on predefined series

- Additional attributes:

  - Description   Description of project

  - Rev description Description of the modification done related to project revision – not available for 1st revision

  - Project manager Name of the project manager

  - Planned start date Date the project is planned to start

  - Planned finish date Date the project is planned to be ready

  - Changed by   Displays modifier

  - Author

  - Template type   Definition if the structure is a template for new projects

  - Actual start date Date the project is promoted to 'Active' status, automatically filled

  - Actual finish date Date the project is promoted to 'Completed' status, automatically filled

  - The rest of the data may vary depending on your system configuration

2.3   Phase, Gate and Task data

- Phases, gates and tasks are located in 'Projects/Tasks/' type

  - ⌄ Projects   3
    - Project
    - Program
    - ⌄ Tasks   3
      - Gate
      - Phase
      - Task

- Mandatory information are marked with *:

  - o   ID   Gate or Task number, typically generated automatically based on predefined series

  - o   Revision   Gate or Task revision, typically generated automatically based on predefined series

- Additional attributes

  - o   Description   Description of Gate or Task

  - o   Rev description   Description of the modification done related to Gate or Task revision – not available for 1st revision

  - o   Task priority   Defines the priority of the task.

  - o   Planned start date   Date the gate or task is planned to start

  - o   Planned finish date   Date the gate or task is planned to be ready

  - o   Percentage of completion   Displays the state of the task or gate in percentage

  - o   Duration   Displays the duration of the task or gate

  - o   Changed by   Displays modifier

  - o   Author

  - o   Task explanation   Additional information considering the task

  - o   Actual start date   Date the gate or task is promoted to 'Active' status, automatically filled

  - o   Actual finish date   Date the gate or task is promoted to 'Completed' status, automatically filled

  - o   Project ID   Number of the project, copied automatically when a gate or task is created

  - o   Template type   Definition if the structure is a template for new projects

  - o   The rest of the data may vary depending on the customer configuration

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3   Functions

3.1   Creating new project object

Related actions

+ *–menu*

Choose desired project type and fill in mandatory attributes and possible additional information.

3.2   Viewing project structures

Project structures can be viewed in the object information window by choosing **GANTT** tab. You can navigate through phases, gates and tasks by clicking the arrows next to the project objects. See the picture below.

New objects considering certain phases may be added to the structure by clicking the ⊕ icon.

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3.3   Managing projects

Projects consist of phases and tasks. Whole project and its tasks and phases are given planned time windows (grey and black bars) that indicate when the objective in question is planned to start and when it is planned to be completed. Darker bar on top of planned time window indicates how much of given task is completed.

Time windows can be modified either by clicking on the edges of bars and dragging to change starting or ending dates or by double clicking on project/task rows and changing dates in opening 'Time adjust' -window. Projects and tasks can also be assigned to other users from that window (see below).

Related actions

- Progress of individual tasks and phases determines how much of the project is displayed to be completed.

- Not yet implemented.

- This is calculated depending on what rate the tasks have been advancing in the past. Function is toggled by pressing `ESTIMATED` button.

- Red dashed bar indicates that completion of objective is estimated to be behind planned time window.

- Actual time that it took to complete the objective is displayed as blue bar (seen above in M2 task) when project or task is promoted to 'Completed'. Function is toggled by ACTUAL button.

- You can also change timeline along witch projects are displayed by pressing [ ] button and toggling between days, weeks or months.

- You can also display moments when tasks or projects were approved on timeline by pressing STATUSES button.

Note that you can also view all your current projects, tasks, phases, their statuses and other data from 'Projects workspace' -tab of your home screen.
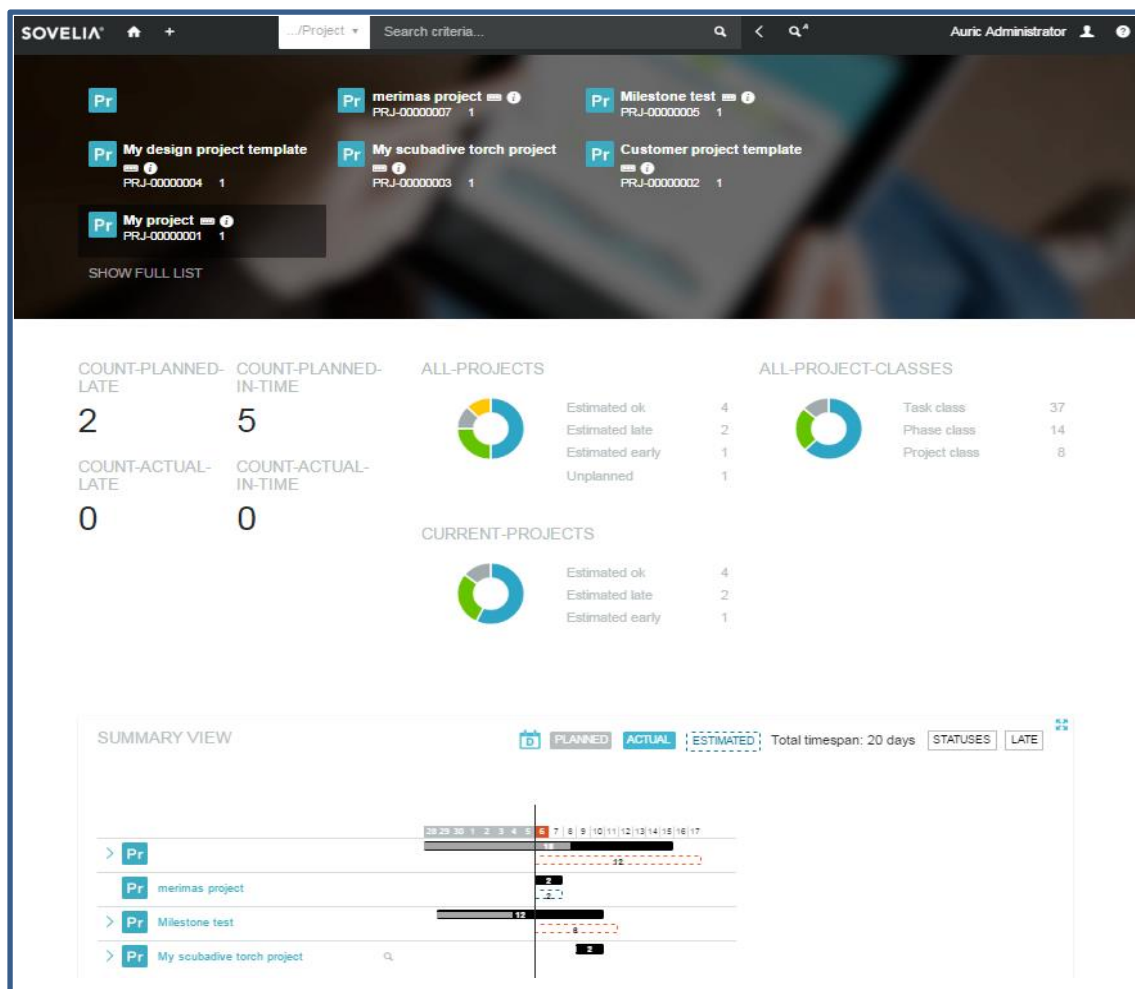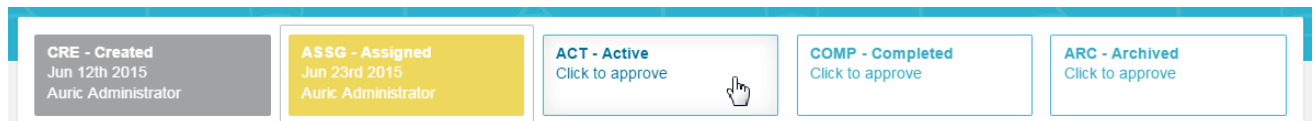
3.4 Approving project objects

Project object approval is controlled by rules presented in chapter 'Lifecycle and rules'.
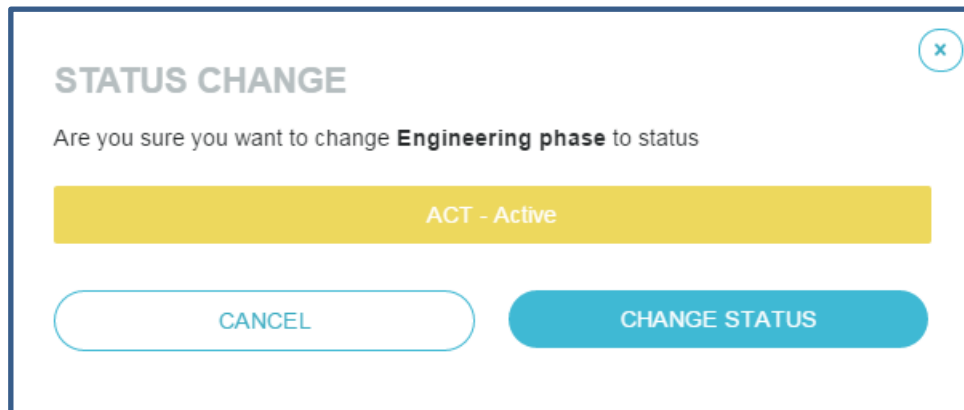
Related actions

⚑ Approve -*menu*

Opens the status selection window. The next state is preselected. Confirm the promote operation by clicking the 'Change status' button.

You can also click the status bars under the thumbnail in object info window to change object status:

| CRE - Created Jun 12th 2015 Auric Administrator | ASSG - Assigned Jun 23rd 2015 Auric Administrator | ACT - Active Click to approve | COMP - Completed Click to approve | ARC - Archived Click to approve |

Confirmation window opens:

Demoting

Demoting an object can be done by choosing a lower status bar in the object information window.

The demote operation is allowed in exceptional cases and is not needed in daily use.

3.5 Creating a new project structure based on template

Not yet implemented.

3.6 Reports

Not yet implemented.