

Smartline project

User Guide

Revision 1.1

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Installation

Installation of the Demo Version

The Demo version does not need to be installed. Simply download the Demo file from www.smartlineproject.com and save onto your computer or server. You can then launch the demo by double-clicking on this file in Windows Explorer.

Installation on a single PC

1. Download the installation file from the link provided to you on our website on completion of your purchase. Save the file into a temporary location.
2. Double-click on the file to begin the installation.
3. Follow the on-screen prompts and complete the installation.
4. You can launch the product by:
 - a. Double-clicking the Desktop Icon
 - b. Going to Start->All Programs->IDIAZ Software Ltd->Smartline Project
 - c. Double-clicking on the installed file through Windows Explorer

Important Note:

Once Smartline Project is installed, the file must not be copied or moved to any other location. If the installation path or filename is changed, or the file is copied, the Projects Manager will not open! You will then need to request a new installation file and overwrite your installed version. You will not lose your project files, but you will lose any default settings that were set in the Projects Manager. You will also need to individually Check-In each project file back into the Projects Manager.

Installation on a network location

1. Download the installation file from the link provided to you on our website on completion of your purchase. Save the file into a temporary location.
2. Double-click on the file to begin the installation.
3. Follow the on-screen prompts and complete the installation. When prompted, select a location that is accessible to all users.
4. The installation will create a desktop icon on your computer.
5. Other users can access the program by creating a desktop shortcut. To do this, drag the installed file to each user's desktop using the right mouse button, and select Create Shortcut from the menu.
6. You can launch the product by:
 - a. Double-clicking the Desktop Icon
 - b. Going to Start->All Programs->IDIAZ Software Ltd->Smartline Project
 - c. Double-clicking on the installed file through Windows Explorer

Important Note:

Once Smartline Project is installed, the file must not be copied or moved to any other location. If the installation path or file name is changed, or the file is copied, the Projects Manager will not open! You will then need to request a new installation file and overwrite your installed version. You will not lose your project files, but you will lose any default settings that were set in the Projects Manager. You will also need to individually Check-In each project file back into the Projects Manager.

Quick Start Guide

General Notes

1. In Smartline Project, all cells requiring user input are highlighted in yellow colour (which can be toggled to white on some screens).
2. In Project Files, all screens can be accessed from the Home Page.
3. Before setting up a project plan, navigate to the Project Settings page from the Home page to ensure your desired settings for Currency and Date format are selected.

Create and Open a Project file

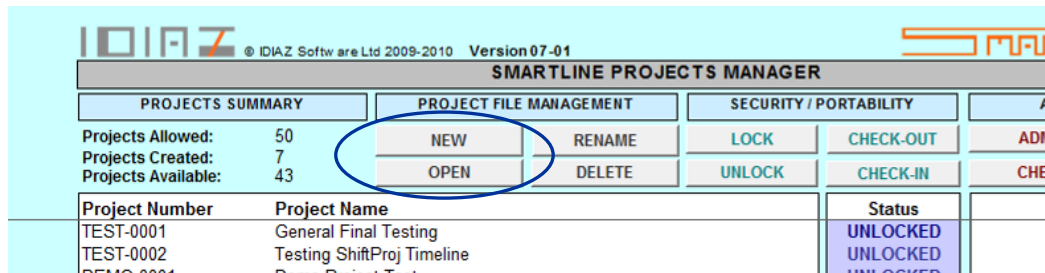
1. Launch Smartline Project, and enable macros by selecting the Options button from Security menu.
2. Select New.
3. Enter a project number and project name when prompted.
4. Select a location to save the project file, modify the suggested file name if required, and select Save.
5. Once the project file has been created, select Open.

Note: Project files can also be opened directly from Windows Explorer. For Smartline Project files to operate, Macros must be enabled. You will be prompted to enable macros on opening the Projects Manager or a project file.

Important Note:

Project Files should not be copied or moved once they have been created. If you wish to work on a project file in a different location, you can use the Check-Out facility in the Projects Manager to make the project file portable for a limited period.

If you do need to rename a project file or move it to another location, you will need to check the file back in to the same project slot from within the Projects Manager using the Check-In facility.



Enter Resources

1. On the Home Page, select Resources
2. Enter resource names, initials and rates. Enter the Charge rate or the Base (Cost + Overhead) rate for each resource, and the rate multiplier.
3. Select Insert to create additional resources.

RESOURCE DETAILS						
NAVIGATION		ACTIONS				
DONE	Scope	Insert	Move Up			
SAVE	Progress	Delete	Move Down			
PRINT	Utilisation					
Name	Initials	Role	Base Rate	Rate Multiplier	Charge Rate	
Sam Johnson	SJ	Director	\$266.67	1.50	\$400.00	
Andriana Peterson	AP	Project Manager	\$200.00	1.50	\$300.00	
Robert Maxworthy	RM	Lead Designer	\$166.67	1.50	\$250.00	
Mark Moonwalker	MM	Senior Designer	\$133.33	1.50	\$200.00	
Bob Builder	BB	Junior Designer	\$100.00	1.50	\$150.00	
Scott Mayor	SM	Administrator	\$66.67	1.50	\$100.00	

Note: Resource initials must be unique as they will be used for allocating resources to tasks when creating the project plan.

Plan the Project

1. Navigate to Scope and Fees.
2. Create the project plan (Work Breakdown Structure or WBS) by using the Action buttons.

NAVIGATION		DISPLAY		ACTIONS		SCHEDULE INFORMATION			COST BASIS
HOME	Costs	Resources	Costs	Insert	Start Date	Duration	End Date	Charge Rates	
SAVE	Progress	Fee Allocat.	Hours	Variation	Wed 04/11/09	194	Wed 11/08/10	Base Rates	
PRINT	Utilisation	Fees	Gantt Chart	Delete	BASELINE ACTIONS			SELECTION	
Holidays	Resource			Move	Set Baseline	Update to Current		Base Rates	

You can hide and display as required by selecting the appropriate Display buttons. Note the following regarding the WBS:

- a. The WBS consists of 3 levels: Phase (or Stage), Heading (or Work Group) and Task. Organise the project tasks into logical work groups and Phases.
- b. Resources are assigned at the Task Level, Actual Costs will be entered later at the Heading or Phase level, and Fees are entered at the Phase level.
- c. Every Phase should have an applicable Fee.

Heading	Task	Work Breakdown Structure
		Demo Project Test
		1 Initial Proposals
		1 Management
	1.1	Instruction to commence work
	1.2	Kick-off project team meeting
	1.3	Project Planning

3. Enter start dates and durations as number of working days (Mon-Fri), to schedule tasks. If the commencement of a task is dependent on the completion of another task, enter the latter (predecessor task) in the predecessor column. This will automatically set the start date for that task.

Original Start Date	Duration (workdays)	Original End Date	Predecessors	Initials
Wed 04/11/09	194	Wed 11/08/10		
Wed 04/11/09	84	Wed 10/03/10		
Wed 04/11/09	84	Wed 10/03/10		
Wed 04/11/09	0	Wed 04/11/09		
Wed 04/11/09	0	Wed 04/11/09	1.1	
Wed 04/11/09	5	Tue 10/11/09	1.1	

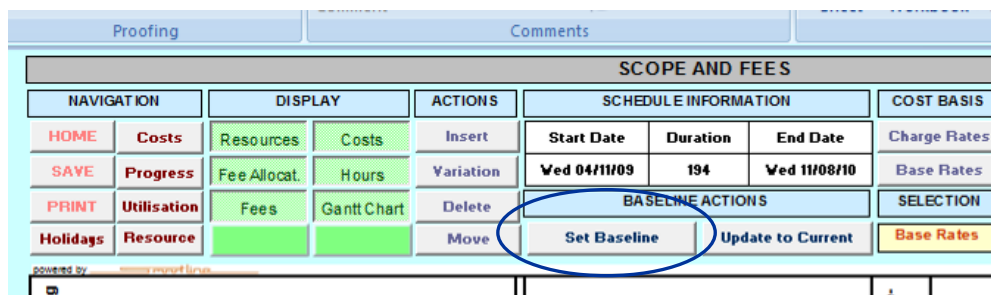
- Ensure Resources are displayed and allocate resources to tasks by entering their initials and planned work hours (this is not the duration but that actual number of person-hours). You can allocate up to 5 resources per task.

Original End Date	Predecessors	Resource Allocations										Fee
		Allocation 1		Allocation 2		Allocation 3		Allocation 4		Allocation 5		
		Initials	Hrs	Initials	Hrs	Initials	Hrs	Initials	Hrs	Initials	Hrs	
11/08/10												
10/03/10												
10/03/10												
04/11/09												
04/11/09	1.1	SJ	4.00	AP	4.00	RM	4.00					
10/11/09	1.1	AP	8.00	RM	8.00							

- Ensure Fees are displayed and enter the fixed / lump sum / current agreed fee amounts against each Phase.

Fee Allocation	Fees	Planned Cost Base Rates	Total Hours	02/11/09	09/11/09	16/11/09	23/11/09
\$680,000.00	\$680,000.00	\$372,266.67	2880				
\$305,000.00	\$305,000.00	\$167,866.67	1260				
\$59,837.17		\$32,933.33	196				
\$0.00		\$0.00	0				
\$4,602.86		\$2,533.33	12				
\$5,329.63		\$2,933.33	16				
\$49,904.69		\$27,466.67	168				

- Ensure Costs are displayed and review the planned costs based on your resource planning. Make any changes if required.
- Select Set Baseline. This will record work-hours and cost information. It will also apportion the fee to tasks and headings based on the resource planning. These fee allocations will be used in calculating Earned Values.



- Arrange for the project to be set up properly in your timesheet system. It is strongly recommended that the WBS Headings (Work Groups) are set up in the timesheet system for booking time to. This will enable Smartline Project to provide very powerful reporting data for analysis.

Project Tracking – Enter Costs

Once the project commences, it should be tracked on a regular basis.

1. Obtain the cost-to-date data from your timesheet system.
2. Ensure the correct cost column is displayed (Charge or Base rates) to match the output data from your timesheet system.
3. Enter the actual costs against each WBS Heading (Work Group), or at the Phase level, if data is not available at this level.
4. Select Post Costs to record this information. Note that costs can only be posted to the end of a calendar week (Sunday).

ACTUAL COSTS		
NAVIGATION	ACTIONS	COST BASIS
HOME	Progress	Charge Rates
SAVE	Scope	Base Rates
PRINT	Holidays	Charge Rates

Heading	Work Breakdown Structure (WBS)	Progress %	Costs to Date (Charge Rate Basis)
	Demo Project Test	26%	\$247,200.00
	Initial Proposals	59%	\$247,200.00
1	Management	17%	\$69,200.00
2	Design Work	69%	\$178,000.00
	Detailed Proposals		
3	General		
4	Design Development		
5	3D Simulation and Model		
6	Testing		

Project Tracking – Enter Progress

Once the project commences, it should be tracked on a regular basis. No changes should be made to the Scope and Fees module unless there is a change in Scope or Fee.

1. Check the Status Date (the date up to which you are updating the programme) and change if required.

NAVIGATION		DISPLAY		ACTIONS	SCHEDULE INFORMATION		
HOME	Costs	Resources	Fees	Post Progress	Last Posting:	Start Date	Du
SAVE	Scope	EV	Hours		Sun 17/01/10	Mon 02/11/09	1
PRINT	Utilisation	Costs	Gantt		Enter Status Date:	Fri 08/01/10	
Holidays	Resource						

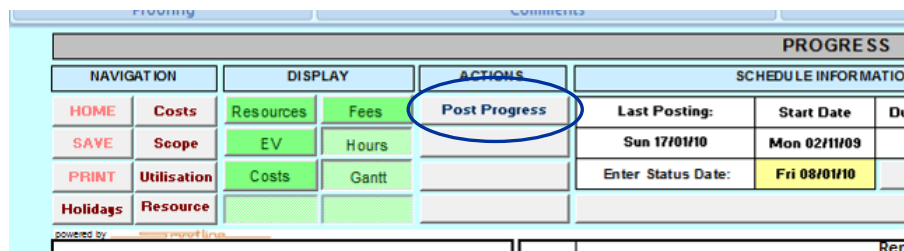
2. Enter progress in percentage % terms against each task that has commenced. Note:
 - a. If tasks have just commenced, you will be prompted to enter an Actual Start Date.
 - b. If tasks are marked as 100% complete, you will be prompted to enter an Actual Finish Date.

Task	Work Breakdown Structure	Predecessors	Progress	Start Date (Actual, if started)	Start Date for Remaining Work	Remaining Duration (workdays)	Finish Date (Actual, if complete)	AI Initial
mo	Project Test		26%	Mon 02/11/09	Fri 08/01/10	154	Wed 11/08/10	
	Initial Proposals		59%	Mon 02/11/09	Fri 08/01/10	20	Thu 04/02/10	
	Management		17%	Mon 02/11/09	Fri 08/01/10	6	Fri 15/01/10	
1.1	Instruction to commence work		100%	Mon 02/11/09	Fri 08/01/10	0	Mon 02/11/09	
1.2	Kick-off project team meeting	1.1	100%	Mon 02/11/09	Fri 08/01/10	0	Mon 02/11/09	SJ
1.3	Project Planning	1.1	100%	Mon 02/11/09	Fri 08/01/10	0	Wed 11/11/09	AF
1.4	Management / Reporting	1.1	1%	Mon 02/11/09	Fri 08/01/10	6	Fri 15/01/10	SJ

- For each task, review the remaining duration, and adjust if required to suit the current project status.
- Ensure Resources are displayed and review the resource allocations for the remaining work. Adjust if required to suit the current project status.
- To review resource utilisations for the remaining work, you can navigate to the Resource Utilisations module, and revert to the Progress screen from there.

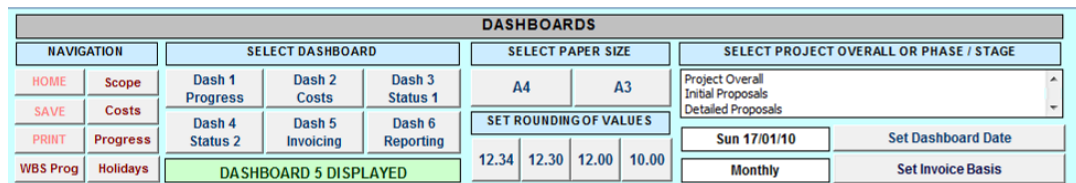
Name	Initials	Role	Total Hours	Total Cost (Charge Rates)	Total Cost (Base Rates)	Flag Hrs Over	Flag Hrs Under	Hrs/week 04/01/10	Hrs/week 11/01/10
Sam Johnson	SJ	Director	40	\$15,968.00	\$10,645.33	40		1	7
Andriana Peterson	AP	Project Manager	98	\$29,280.00	\$19,520.00	40		3	15
Robert Maxworthy	RM	Lead Designer	289	\$72,200.00	\$48,133.33	40		2	9
Mark Moonwalker	MM	Senior Designer	472	\$94,400.00	\$62,933.33	16	8	2	10
Bob Builder	BB	Junior Designer	780	\$117,000.00	\$78,000.00	16	8	4	20

- When progress has been entered for all tasks, select Post Progress to record this information. Note that progress can only be entered to the end of the calendar week (Sunday) or calendar month.



Analyse and Report – Dashboards

- Navigate to Dashboards.
- Select the desired Phase/Stage, or select Project Overall.
- Change the Status Date if required. Dashboards will display data up to this date, except for the projected cash flow, billed to date and invoice values.
- Set the invoice period to Weekly or Monthly as required. This will set the cash flow periods.
- Set the rounding of the invoice amounts, if required.
- View Dashboards 1-6. Remember, each dashboard has 3 preset options to select from. Refer to Project Settings for details.



Analyse and Report – Numeric Data

1. Navigate to Numerics.
2. Select the desired Phase/Stage, or select Project Overall.
3. All data is presented on the project timeline.

NUMERIC BREAKDOWN							
NAVIGATION		ACTIONS					
HOME	Numerics	Select Phase / Stage:					
SAVE	Scope	Initial Proposals					
PRINT	Progress	Detailed Proposals					
Week Commencing	Month	02/11/09	09/11/09	16/11/09	23/11/09	30/11/09	07/12/09
Initial Proposals							
Baseline Info							
Baseline Progress		6%	12%	14%	16%	24%	3
Baseline Earned Value		\$19,551	\$35,192	\$42,035	\$48,878	\$71,851	\$94,000
Earned Value							
Progress %		8%	17%	20%	23%	24%	2
Earned Value up to end of week		\$24,419	\$52,141	\$61,630	\$69,867	\$74,591	\$81,000
Earned Value up to end of month						\$70,811	
Actual Costs							
Actual Costs to end of week - Charge Rate basis		\$27,000	\$73,000	\$89,000	\$114,500	\$137,000	\$175,000
Actual Costs to end of week - Base Rate basis		\$18,000	\$48,667	\$59,333	\$76,333	\$91,333	\$116,000
Forward Billing							
Forward Billing amount for week							
Forward Billing amount for month							
Contingency							
Contingency - Charge Rate basis		\$46,360	\$23,246	\$15,080	-\$3,620	-\$36,020	-\$67,000
Contingency % - Charge Rate basis		15%	8%	5%	-1%	-12%	-2
Contingency - Base Rate basis		\$132,573	\$117,164	\$111,720	\$99,253	\$77,653	\$56,000
Contingency % - Base Rate basis		43%	38%	37%	33%	25%	1
Status							
Schedule (-ve = days behind)		2	11	8	5	1	

Analyse and Report – Progress Summary

1. Navigate to Progress Summary
2. Progress, Fee information and Earned Value are displayed in summary format for each Heading (Work Group) of the WBS.

The Projects Manager

The Projects Manager is used to create project files and carry out a number of project file management tasks. It is also the place to set default settings for your business that will be used to build all new project files. Note that these default settings can be changed individually within project files.

Important Note:

To use the tools of the Projects Manager, it must be opened in read-write mode i.e. only one user can access its tools at any point in time. To prevent users leaving the Projects Manager file open for extended periods, the Projects Manager will save and close automatically after 2 minutes of inactivity. This time setting can be changed in the Administrator Area, if required.

The main Projects Manager screen is shown below. This is where the main project file management functions are carried out.

SMARTLINE PROJECTS MANAGER							
PROJECTS SUMMARY		PROJECT FILE MANAGEMENT		SECURITY / PORTABILITY		ADMINISTRATOR	
Projects Allowed:	3	NEW	RENAME	LOCK	CHECK-OUT	ADMINISTRATOR AREA	
Projects Created:	1	OPEN	DELETE	UNLOCK	CHECK-IN	CHECK PROJECT PATH	
Projects Available:	2						
Project Number	Project Name			Status			Comment
T10a	Testing 10Apr-a			UNLOCKED			

Each project file is represented by one line which displays the Project Number, Name, Status of the file (Unlocked, Locked or Checked-Out) and any comments entered by the user when locking or checking-out the file.

Create New Project

1. Select New under Project File Management.
2. Enter a project number and project name when prompted.
3. Select a location to save the project file, modify the suggested file name if required, and select Save.

Important Note:

Project Files should not be copied or moved once they have been created. If you wish to work on a project file in a different location, you can use the Check-Out facility in the Projects Manager to make the project file portable for a limited period.

If you do need to rename a project file or move it to another location, you will need to check the file back in to the same project slot from within the Projects Manager using the Check-In facility.

Open Project

You can open project files by one of the following methods.

1. Select the project file in the Projects Manager and select Open under Project File Management.
2. Double-click on the project file in the Projects Manager.
3. Open the file directly from Windows Explorer, and enable macros when prompted.

Rename Project

1. Select the project file you wish to rename, and select Rename under Project File Management.
2. Enter New Project Number and/or Name when prompted.

Delete Project

1. Select the project file you wish to delete, and select Delete under Project File Management.
2. You will be asked to confirm the action.

Lock Project

Project files can be locked to restrict access to project data. A password is required to lock a project file, and this password must be entered to open the file.

Note: If a password is forgotten, it can be obtained from the Administrator section of the Projects Manager.

1. Select the project file you wish to lock, and select Lock under Security/Portability.
2. Enter a password and confirm it when prompted.
3. When prompted, enter a comment if desired. *Note: Comments are displayed in the Comments column and could be used, for example, to indicate who has locked the file and why.*

Unlock Project

Project files that have been locked can only be unlocked by supplying the password that was used to lock the file.

Note: If a password is forgotten, it can be obtained from the Administrator section of the Projects Manager.

1. Select the project file you wish to unlock, and select Unlock under Security/Portability.
2. Enter the password that was used to lock the file when prompted.

Any comments previously noted against the file will be removed.

Check-Out Project

Under normal operation with Smartline Project, project files can only be opened if they haven't been moved or renamed. If you need to make a file portable (for example, to work from home, or take the file on a business trip), you can use the Check-Out feature which will create a copy of the project file that can be opened from any location for 8 days. Until the portable file is Checked-In back into the Projects Manager, the original project file remains locked and cannot be edited by anyone.

1. Select the project file you wish to Check-Out, and select Check-Out under Security/Portability.
2. If the file is locked, enter the project file password when prompted.
3. Select a location and name for the Portable file that is to be created when prompted.
4. When prompted, enter a comment if desired. *Note: Comments are displayed in the Comments column and could be used, for example, to indicate who got the checked-out file and for how long.*

Check-In Project

Project Files that have been Checked-Out to create portable copies can be checked back in using the Check-In facility.

The Check-In Facility can also be used to check in a new project file that is created by another user, say another business, and sent to you for sharing.

This facility can also be used to repath a Project File back into the Projects Manager if the file has been renamed or moved to a different location. Without repathing the file into the Projects Manager to record its new name and location, it will not be possible to open the Project File.

To Check-In a Checked-Out file:

1. Select the project file that is Checked Out wish you wish to Check-In, and select Check-In under Security/Portability.
2. If the file is locked, enter the project file password when prompted.
3. When prompted, browse to the Portable file that is to be checked-in.

The previously portable file will be copied over the original project file (overwriting it) and then the portable file will be deleted.

Any comments previously noted against the file will be removed.

To Check-In a New Project File into an available Project Slot:

1. Select an empty project slot where the status in the status column is shown as AVAILABLE, and select Check-In under Security/Portability.
2. Enter the Project Number and Name you wish to use for this project when prompted.
3. When prompted, browse to the location and select the file you wish to Check-In.

You will now be able to open this Project File as a normal Project File.

To Repath New Project File that has been renamed or moved:

1. Select the Project File that needs to be repathed, and select Check-In under Security/Portability.
2. If the file is locked, enter the project file password when prompted.
3. When prompted, browse to the new file that is to be checked-in.

You will now be able to open this Project File as a normal Project File.