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Project Management Functional Spec

Summary:

This document will layout the details for building the Project Management Portlet. The relationships are as follows:

- Projects are associated with a specific firm (client)
- Tasks are associated to a specific project

The intention is to track the projects that a firm may have, the tasks that have been generated from the project, and all the time that may have been spent on the task. Using this information, the number of hours spent per project or the number of hours spent per firm can also be determined.

Adding Firms or Projects:

The user should first have the option to select from a list of available firms. Within this list is the option to list only clients (as opposed to all firms). Above the list of firms is a link to add additional firms. Once a firm has been selected, the user has the option to either add a new project or edit the firm's name. Access to edit either the firm name or the projects should only be given to management. Projects should also be associated with Project Managers (PM), which will thus be displayed in their respective portlets.

Creating Work Flow:

Prior to creating a task, the task work flow needs to be set up. This requires the firm to determine the types and directions a task needs to follow. Each step of the work flow needs to be given a name or an associated group. By default, each type of work flow is given a "Create" step. So for instance, a "Development" type work flow may have the following steps and groups (groups are within the parentheses):

Create → Develop (Developers) → QA (QA) → Migrate (Migration)

Adding Tasks:

By selecting a specific project from their *Project Portlet*, a PM may create a task of a particular type of work flow. Following from the previous example of the "Development" type work flow, a PM may then either leave the recipient for each step as the group as a whole, or

specify a specific individual. For instance, a PM may wish that a particular developer work on his or her task since the developer may have prior knowledge of the project at hand, but may wish to leave the QA open to anyone within the QA group. Other bits of information necessary in filling out a task are:

- Estimated number of hours to complete
- Estimated date of completion
- Title
- Description

A *Task Portlet* should list the user's appropriate tasks. This is dependent on several factors. By default, the task should always appear within the task owner's (person who created the task) *Task Porlet*. Depending on the step of the work flow, the task should also appear within the *Task Porlet* of the user if he or she has been designated as the recipient of the task or if he or she is within the specified group of the step.

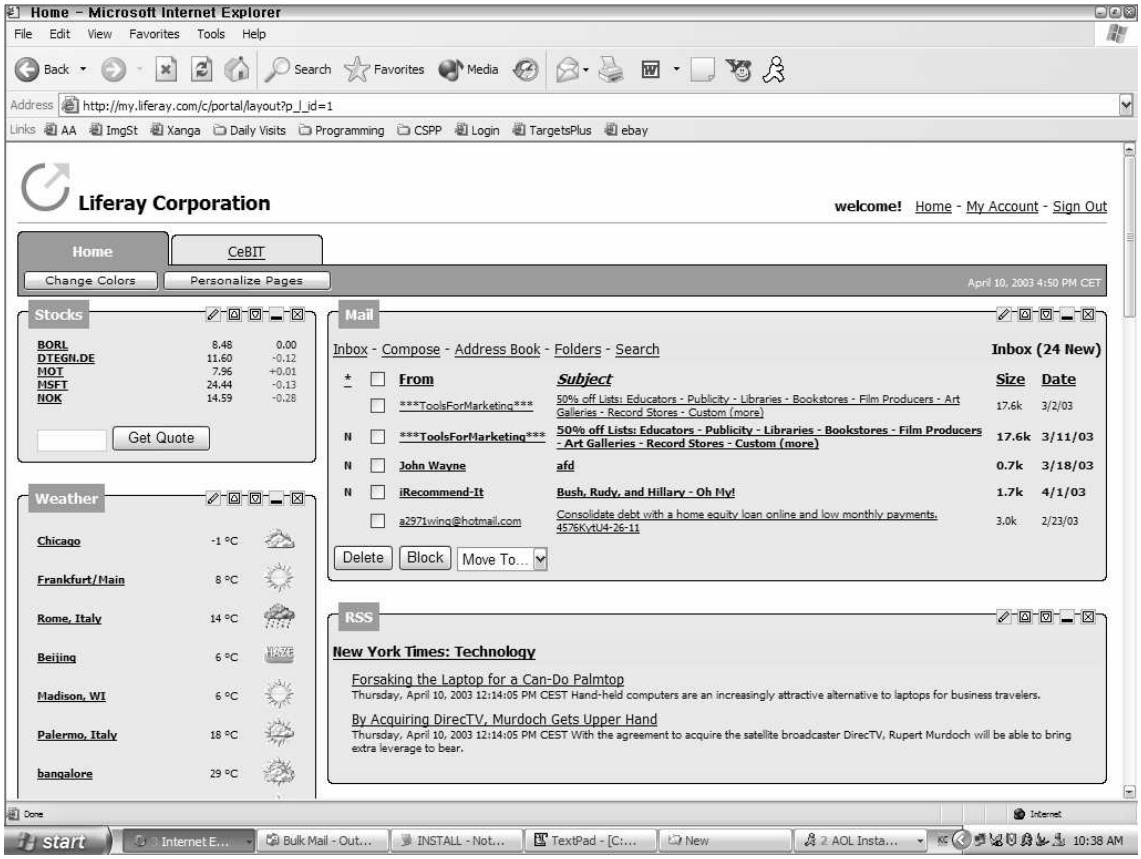
Adding Time:

A user must keep track of their hours within the day. This is done within the *Time Management Portlet*. By default, this portlet should display a list of all time entered by the user for the current day. Of course, the user should also have the ability to add time spent to a particular project, whether or not the time was spent on a given task or not. The necessary information for a time entry would be:

1. Date (should default to current date)
2. Time spent
3. Project associated
4. Description

Every task should have an option to submit time directly to the *Time Management Portlet*. Using this option would, by default, fill in the Project and to some degree, the task description. Ability to edit time entries should be restricted to 3 days prior, to prevent fluctuations in project budgets. A text field within the *Time Management Portlet* will accept a date to allow the user to view a previous date's entries.

Reporting:

Based off of information entered within the *Time Management Portlet*, a PM should be able to view the total time billed for a project within the *Project Portlet*.

Snapshot: