



Project planning in ProjectCompanion

In ProjectCompanion, people can work together in the same tool to plan and track projects. This document provides simple examples to get started with project planning in ProjectCompanion.

Project structure

A project structure in ProjectCompanion consists of goals, milestones, tasks, cases and case items. Goals, milestones and tasks are added in the **Project plan**. Cases and case items are managed in the project **Workflow** view. Basically, milestones and tasks are used for the main project structure, and workflow cases are used to support the daily work.

Goals – deliveries and effects of the project

Milestones – a point in time when a specific state is reached.

Tasks – a complex activity involving several persons.

Cases – delimited work delegated to a person.

Case items – a step within a case.

To reach one milestone typically requires that several tasks are executed. Each task can be divided into several cases. A case can be divided into case items. Let's look at a simple example.

Goal – Improve customer satisfaction

Milestone – Preliminary study completed

Task – Collect data

Case – Interview customer A (John)

Case item – Schedule interview (Bob)

Case item – Perform interview (John)

Case item – Document interview (John)

Case – Interview customer A (Kumar)

Case – Analyze complaint database (Erica)

Task – Analyze data.

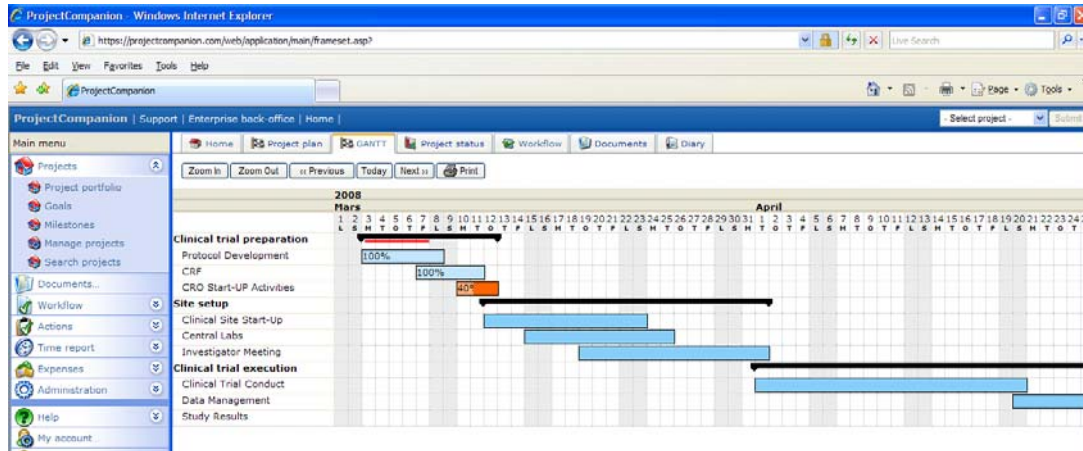
Task – Write report

The goal in the project is to improve customer satisfaction. To reach the first milestone "Preliminary study completed" may require us to perform the tasks "Collect data", "Analyze data" and to "Write report". The task "Collect data" may contain the cases "Interview customer A", "Interview customer B" and "Analyze complaint database". These cases are delegated to the persons who will be responsible. To keep track of the details in the case, Interview customer A could be divided into the case items "Schedule interview", "Perform interview" and "Document interview". John gets help from Bob to schedule the interview.

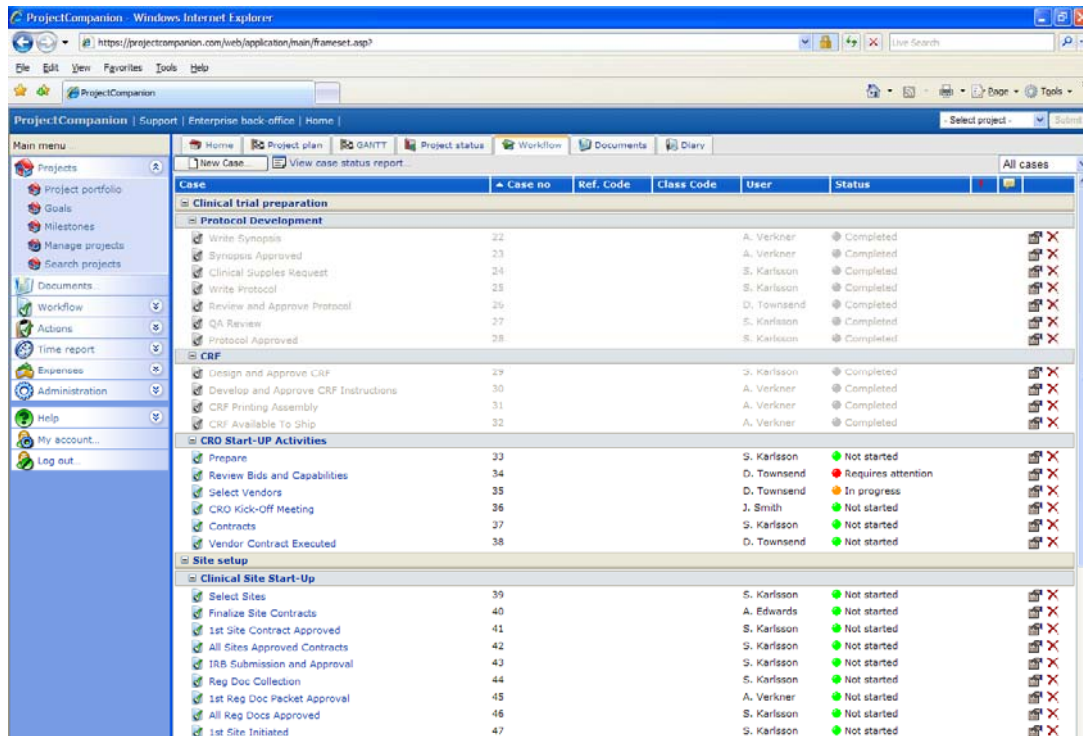
The main project structure with goals, milestones and tasks may be relatively stable over the project lifecycle, but there are often many issues that were not foreseen. Using cases is a good way to take care of the daily work.

Example A – Clinical trial project

Milestones and tasks



Workflow cases

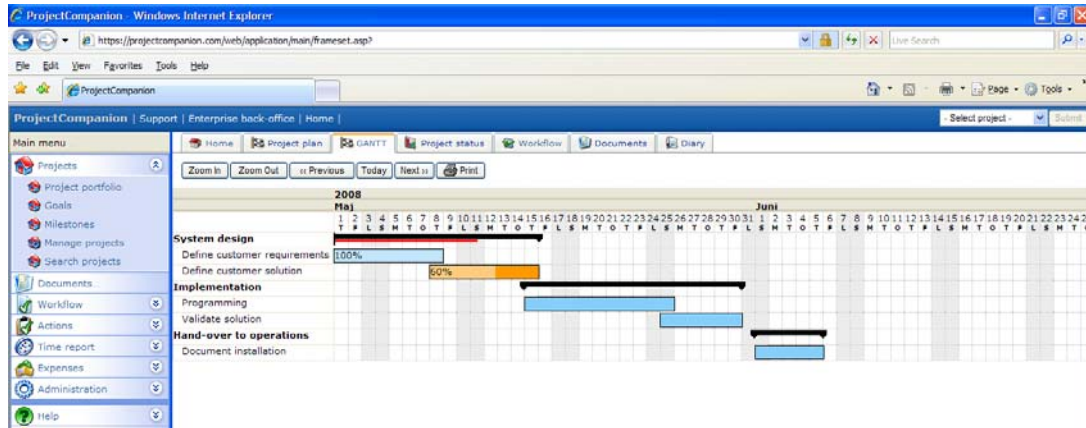


The screenshot shows a table of workflow cases. The main menu on the left includes: Projects, Project portfolio, Goals, Milestones, Manage projects, Search projects, Documents..., Workflow, Actions, Time report, Expenses, Administration, Help, My account..., and Log out... The table has columns for Case no, Ref. Code, Class Code, User, and Status. The cases are categorized by project phase: Clinical trial preparation, CRO Start-UP Activities, and Site setup.

Case	Case no	Ref. Code	Class Code	User	Status
Clinical trial preparation					
Protocol Development					
Write Synopsis	22			A. Verkner	Completed
Synopsis Approved	23			A. Verkner	Completed
Clinical Supplies Request	24			S. Karlsson	Completed
Write Protocol	25			S. Karlsson	Completed
Review and Approve Protocol	26			D. Townsend	Completed
QA Review	27			S. Karlsson	Completed
Protocol Approved	28			S. Karlsson	Completed
CRF					
Design and Approve CRF	29			S. Karlsson	Completed
Develop and Approve CRF Instructions	30			A. Verkner	Completed
CRF Printing Assembly	31			A. Verkner	Completed
CRF Available To Ship	32			A. Verkner	Completed
CRO Start-UP Activities					
Prepare	33			S. Karlsson	Not started
Review Bids and Capabilities	34			D. Townsend	Requires attention
Select Vendors	35			D. Townsend	In progress
CRO Kick-Off Meeting	36			J. Smith	Not started
Contracts	37			S. Karlsson	Not started
Vendor Contract Executed	38			D. Townsend	Not started
Site setup					
Clinical Site Start-Up					
Select Sites	39			S. Karlsson	Not started
Finalize Site Contracts	40			A. Edwards	Not started
1st Site Contract Approved	41			S. Karlsson	Not started
All Sites Approved Contracts	42			S. Karlsson	Not started
IRB Submission and Approval	43			S. Karlsson	Not started
Reg Doc Collection	44			S. Karlsson	Not started
1st Reg Doc Packet Approval	45			A. Verkner	Not started
All Reg Docs Approved	46			S. Karlsson	Not started
1st Site Initiated	47			S. Karlsson	Not started

Example B – Web development project

Milestones and tasks



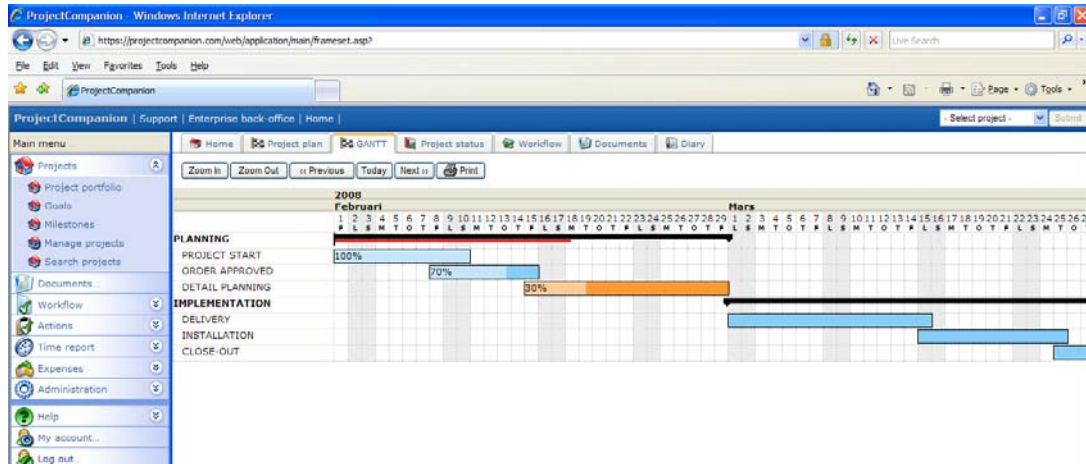
Workflow cases

The screenshot displays a table of workflow cases for the project. The table includes columns for Case no, Ref. Code, Class Code, User, and Status. The cases are grouped by phase.

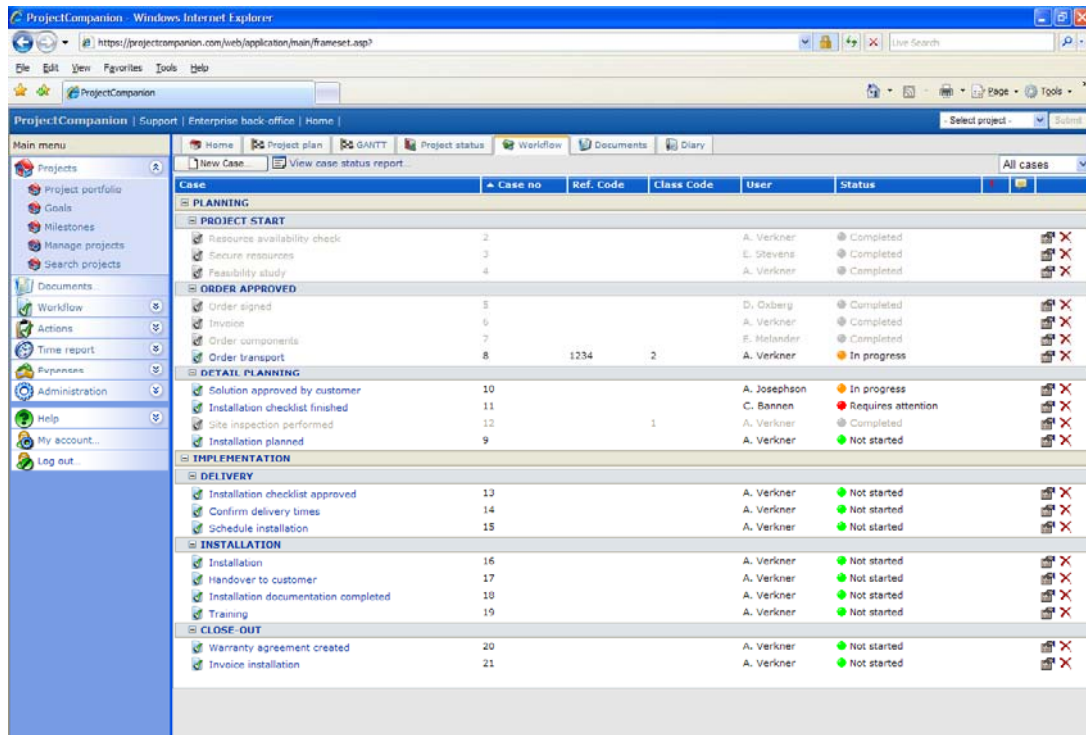
Case	Case no	Ref. Code	Class Code	User	Status
System design					
Define customer requirements					
Collect general information from customer	71			A. Verkner	Completed
Identify specific requirements	72			A. Verkner	Completed
Define customer solution					
Prepare database schema	73			A. Verkner	Requires attention
Create use-cases	74			A. Verkner	In progress
Implementation					
Programming					
Build module 1	75			A. Verkner	In progress
Build module 2	76			A. Verkner	Requires attention
Prototype installation	77			A. Verkner	Not started
Validate solution					
Test functionality 1	78			A. Verkner	Not started
Test functionality 2	79			A. Verkner	Not started
Perform test calculations	80			A. Verkner	Not started
Hand-over to operations					
Document installation					
Maintenance guide forms	83			A. Verkner	Not started

Example C – Machine installation project

Milestones and tasks



Workflow cases



Case	Case no	Ref. Code	Class Code	User	Status
PLANNING					
PROJECT START					
Resource availability check	2			A. Verkner	Completed
Secure resources	3			E. Stevens	Completed
Feasibility study	4			A. Verkner	Completed
ORDER APPROVED					
Order signed	5			D. Oxberg	Completed
Invoice	6			A. Verkner	Completed
Order components	7			E. Melander	Completed
Order transport	8	1234	2	A. Verkner	In progress
DETAIL PLANNING					
Solution approved by customer	10			A. Josephson	In progress
Installation checklist finished	11			C. Bannen	Requires attention
Site inspection performed	12	1		A. Verkner	Completed
Installation planned	9			A. Verkner	Not started
IMPLEMENTATION					
DELIVERY					
Installation checklist approved	13			A. Verkner	Not started
Confirm delivery times	14			A. Verkner	Not started
Schedule installation	15			A. Verkner	Not started
INSTALLATION					
Installation	16			A. Verkner	Not started
Handover to customer	17			A. Verkner	Not started
Installation documentation completed	18			A. Verkner	Not started
Training	19			A. Verkner	Not started
CLOSE-OUT					
Warranty agreement created	20			A. Verkner	Not started
Invoice installation	21			A. Verkner	Not started