FX-PROJECT ®

OPEN SOURCE

Version 21

fx-project Open Source - Info
BRIEF OVERVIEW

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1 General

fx-project version 21, as of June 2021

1.1 Brief Description

Brief overview of the most important programs and functionalities of fx-project.

Unless otherwise described, instructions always refer to the Ultimate version of fx-project, as it includes all functionalities.

1.2 Imprint

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2 Brief Overview of the Functions

2.1 Program Description

fx-project is a 100% web-based and platform-independent, professional project management software with which you can successfully lead your projects to the goal.

2.2 Highlights of fx-project

2.2.1 Master Data

- Master data for all groups of people involved (customers, suppliers, employees, contractors, etc.)
- Unlimited collection of address and communication data
- Skill management of the project participants
- Distribution of rights and roles of the project participants
- Individual extension possibility for additional project participants e.g. consultants etc.
- Integrated personnel master sheet
- Establishment of departmental structures
- Extensive search functions for projects, persons, documents, etc.
- Export and import possibility of all personal data in XML format
- Various reports

2.2.2 Project Management
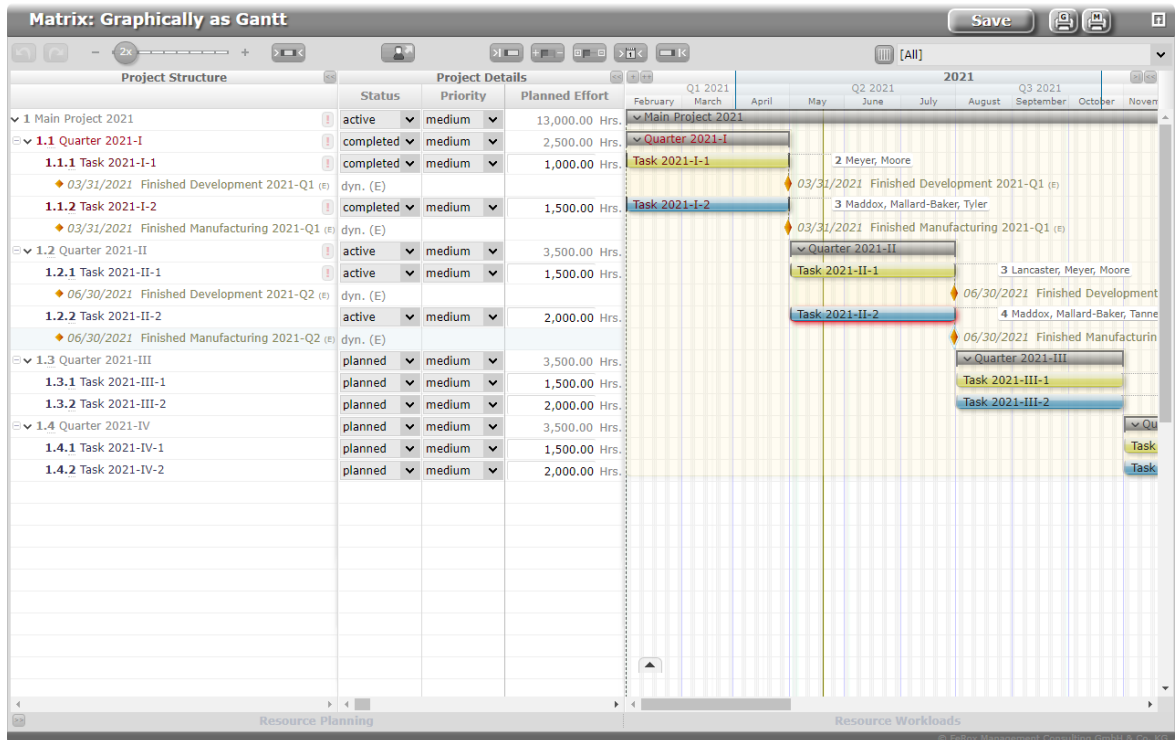
➢ Manage projects, phases, activities, individual tasks (hierarchies, dependencies, status, deadlines, milestones, efforts (e.g. with internal/external billing rate), responsibility, etc. can be edited via individual mask or matrix).
➢ Graphic project shift
➢ Powerful graphical resource planning incl. workload etc.
➢ Workload graphs people/projects or projects/people
➢ Task-related time recording (incl. travel expenses)
➢ Optional budget approval procedure
➢ Complete project history
➢ Continuous until invoicing
➢ Integrated cost accounting (cost units, cost centers, cost type and activity type)
➢ Import and export function to MS-Project
➢ All common types of project completion notifications and corresponding evaluations

2.2.3 Project-related Time Registration

TR (Week/Month) [Save]

Tasks	Info			Mo, 12.04		Tu, 13.04		We, 14.04		Th, 15.04		Fr, 16.04	
	Targ. Hrs. / Planned Time Period	Act. Hrs.	Rem. Hrs. / Priority	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.
1 1.2.1 Task 2021-II-1 > Development [CE-0001]	~500.10 h	80.25 h	473.34 h	08:00	17:00	08:00	15:45	08:30	17:00	08:00	17:00	08:00	15:00
	04/01/2021-06/30/2021		medium	0:30	8:30	0:30	7:15	0:30	8:00	0:30	8:30	0:30	6:30
2 [Unknown]				17:00	18:30	15:45	17:00					15:00	16:00
				0:15	1:15		1:15						1:00
3 +1.2.1 Task 2021-II-1 > Development [CE-0001]	~500.10 h	80.25 h	473.34 h										
	04/01/2021-06/30/2021		medium										
4 +[Unknown]													
Attendance Time From / Until:				08:00	18:30	08:00	17:00	08:30	17:00	08:00	17:00	08:00	16:00
Attendance Duration with / without Break:				10:30	9:45	9:00	8:30	8:30	8:00	9:00	8:30	8:00	7:30
Total Break / Time Period:	Σ		42:15	0:45	9:45	0:30	8:30	0:30	8:00	0:30	8:30	0:30	7:30
Plan Hrs. per Day / Diff. Plan Hrs.:	Σ		40:00	8:00	+1:45	8:00	+0:30	8:00	0:00	8:00	+0:30	8:00	-0:30

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- ➢ Time recording of the employees to the assigned tasks with automatic assignment of the costs
- ➢ Time recording by the week or month
- ➢ Automatic information to project managers when tasks are completed
- ➢ Two-stage time data release (employee/project manager or management or administration)
- ➢ Current data at any time

2.2.4 Project Controlling

> Very powerful schedule and effort management supports planning and controlling through various diagram types (Gantt, WBS, networks...).
> Employees and project managers can see the current work progress at any time, which is supported by "traffic light" functions
> Extensive reporting with thousands of possible variations
> Graphical project overview with chart diagrams at any project level
> Time-controlled controlling: project alerts, time recording check
> Integrated vacation planner with evaluation options
> Central document management system with integrated version management (DMS)
> Performance evaluation of the tasks
> Evaluation of the project indicators
> Automatic notification by email
> Request of the degree of completion from project leader at the push of a button

2.2.5 Individuality

> ➢ Create individual reports without external systems
> ➢ Dynamic, context-sensitive and language-independent help system
> ➢ Multilingual, multi-project and multi-client capable
> ➢ Client-specific design options
> ➢ Comfortable and scalable print preparation in PDF

2.2.6 Invoicing

Edit invoice positions

	Project	Description	Annot.	Rel.	Invoiced	UP Net	Amount
Person Costs							
· P-HB - Per Hour Basis (Persons)							
☐	1.2.1 Task 2021-II-1	Moore, Gerald		x	0.00 €	40.00 €	62.
Travel Costs							
· TE - Travel Expanses							
☐	1.2.1 Task 2021-II-1	Inland Travel 04/06/2021, 08:00 - 04/08/2021, 19:00	Moore, Gerald	x	0.00 €	140.00 €	
☐		· Day Specifications *(Homepland)*	3x	x	0.00 €	44.80 €	
☐		· 3: *Hotel (without Board)*		✓	0.00 €	238.10 €	
☐		· 4: *Parking*		✓	0.00 €	15.83 €	
☑	1.2.1 Task 2021-II-1	Inland Travel 04/12/2021, 08:00 - 04/14/2021, 19:00	Moore, Gerald	x	0.00 €	140.00 €	
☑		· Day Specifications *(Homepland)*	3x	x	0.00 €	44.80 €	
		· 1: *Hotel (without Board)*		◐	233.64 €	233.64 €	
Material Costs							
· M-US - Usage (Material)							
☑	1.2.1 Task 2021-II-1	Usage Material	M-V-001	x	0.00 €	4.00 €	
Additional Costs							
· AP - Free additional positions without project relations / Discounts or the like with negative amounts							
☐	+ 1			x	0.00 €	0.00 €	
⊕	+ Add new additional-cost position						

➢ Invoice writing has been simplified even more
➢ Bundling of invoice items possible
➢ Invoicing of a project with several clients
➢ etc.

2.2.7 Absence

- ➢ With the absence planning vacation, training etc. can be requested
- ➢ Approval/rejection by supervisor
- ➢ Consideration of absenteeism in resource planning, etc.

2.2.8　Access Rights

Access Rights Administration: Documents
→ Projects/1 - Main Project 2021/1.2 - Quarter 2021-II/ **Projectmanagement.pdf**

Description	All	Dsp.	Chk.	Edit	Del.
User					
Contractor					
☐ Tanner, Calvin [ct1]	☐	☐	☐	☐	☐
☐ Tyler, Cindy [ct2]	☐	☐	☐	☐	☐
Customer - Contact Person					
☐ Paulson, Caroline [ca-cp]	☐	☐	☐	☐	☐
Employee					
☑ **Lancaster, Phoebe** [pl]	☑	☑	☑	☑	☑
☐ Maddox, Eric [em1]	☐	☐	☐	☐	☐
☐ Mallard-Baker, Elizabeth [em2]	☐	☐	☐	☐	☐
☑ **Meyer, Paul** [pm]	☑	☑	☑	☑	☑
☑ **Moore, Gerald** [gm] *(General Manager)*	☑	☑	☑	☑	☑
☐ Owen, Pamela [po]	☐	☐	☐	☐	☐
☐ Palmer, R. [rp]	☐	☐	☐	☐	☐
User Profile Group					
☐ 01 Project Leader (Basis)	☐	☐	☐	☐	☐
☐ 02 Project Leader (Professional)	☐	☐	☐	☐	☐
☐ 03 Project Worker	☐	☐	☐	☐	☐
☐ 04 Travel Expenses	☐	☐	☐	☐	☐
☐ 05 Material	☐	☐	☐	☐	☐
☐ 06 Appointments / Vacation Planer	☐	☐	☐	☐	☐
☐ 07 DMS	☐	☐	☐	☐	☐
☐ 08 Project Office	☐	☐	☐	☐	☐
☐ 99 Everything	☐	☐	☐	☐	☐
Department					
☑ **A: Personnel Department**	☑	☑	☑	☑	☑
☑ **B: Financial Department**	☑	☑	☑	☑	☑
☐ C: Production	☐	☐	☐	☐	☐
☐ C-A: Development	☐	☐	☐	☐	☐
☐ C-B: Manufacturing	☐	☐	☐	☐	☐

➢ Role-related function rights (menu)
➢ Targeted access definition for programs and data
➢ Flexible model - from Community, to Professional, to Ultimate

2.3   Architecture of fx-project
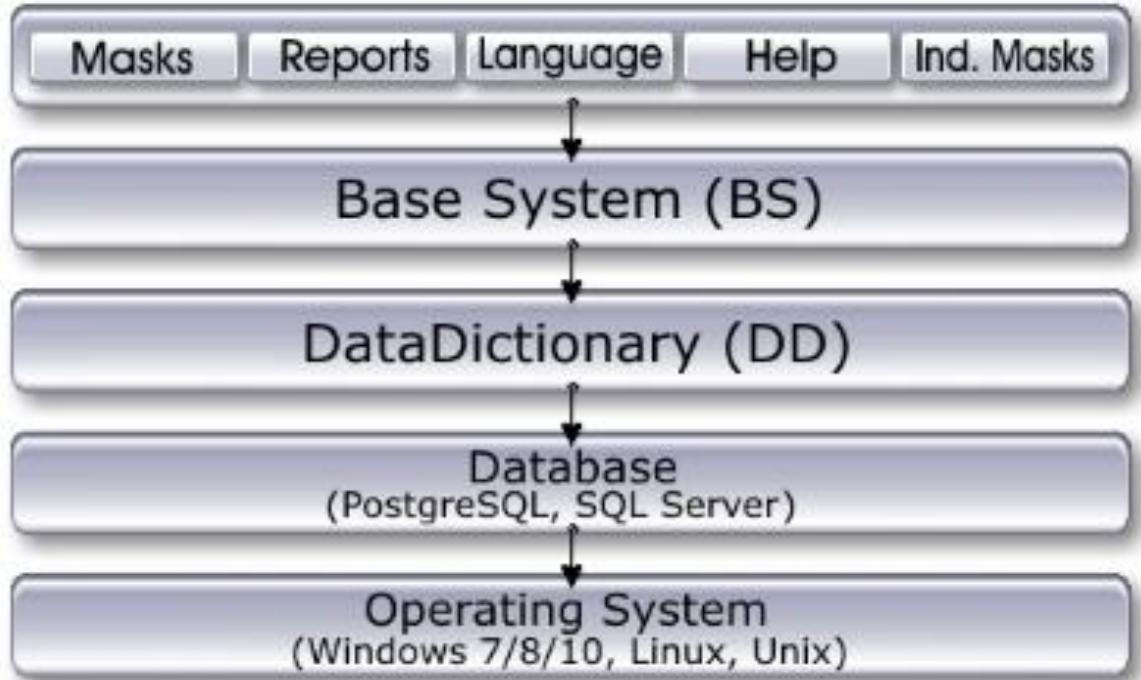
> Microsoft Windows 7/8/10 ®, Linux, Unix, Sun Solaris ...
> Microsoft SQL Server ® + PostgreSQL
> Browser-independent, since pure HTML is generated with JavaScript (thus minimal problems with firewalls)
> Interfaces to Outlook ®, MS-Project ®, MS-Excel ® etc.
> Extensive import and export functions

2.4   Versions / Costs

Due to the good customizing options, fx-project can be very easily adapted to your own CI.

fx-project Open Source is available in three versions:

Community

Open source basic version, free of charge without extension packages (without fx-project license for ChartDirector)

The community version of fx-project Open Source is completely free of charge and already offers all the necessary functionalities for comprehensive project management, including time tracking, absence planner, reports, etc.

Professional

Open source basic version + at least one purchased extension package (includes fx-project license for ChartDirector)

A community version can be upgraded to a professional version at any time by purchasing at least one extension package from the manufacturer FeRox Management Consulting GmbH & Co. KG, e.g. the cost-effective matrix package to enable even easier project planning and much more.

Furthermore, by purchasing a package, the trial version of the graph charts created using "ChartDirector" will also be converted to a full version, i.e. the yellow trial version bar at the bottom of the charts will disappear without you having to purchase a full version of ChartDirector.

Ultimate

Open source base version + all purchased extension package (includes fx-project license for ChartDirector)

The Ultimate version is a community version with all available extension packages, i.e. this version offers the most extensive functionalities.

More information can be found on the homepage at https://www.fx-project.org.

2.4.1   Purchase - Expansion Packages

The extension packages to be purchased are usually interesting for all company sizes, especially the matrix extension package for tabular input and management of projects. As a bonus, each extension package includes a fx-project license for ChartDirector.

Otherwise, the extension packages are designed for companies with special requirements such as DMS, material management or invoice writing.

2.4.2　Rental Version (SaaS - Software as a Service)

The rental version has the advantage that the customer does not have to worry about software updates or hardware. His data is backed up regularly and can be restored by the customer himself (restore a backup) without affecting other SaaS customers.

The customer has his own client with all activated program functions of the Ultimate version. In contrast to the open source version, additional security precautions are integrated here, as well as all program functions are coded.

3 Third-Party Software Notice

For third-party software, the provisions of the respective manufacturer and its license rights shall apply. License rights of third-party software are only included if they are expressly agreed in the contract (operating system, database system, etc.).

Notice:
FeRox Management Consulting GmbH & Co. KG does not assume any liability for third-party software!