



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.



FX-PROJECT®
OPEN SOURCE

100% web based Project Management and Controlling System






2.2 Highlights of fx-project

2.2.1 Master Data

Contract Data

Name, First Name: **Moore, Gerald** [GM] Religion: **other** 

Maiden Name:

Company Address: **SMPL-PLACE, 123 St** PP/Hrs.: **60.00** € Entry Date: **01/01/2021**

Mobile Area: **Europe** SP/Hrs.: **120.00** € Leave Date:

Working Hours/Week: **40.00** Hrs. Workdays: **0** Day(s) Mon: Tue: Wed: Thu: Fri: Sat: Sun:

Working Start Time: **08:00** o'clock Break: **1:00** Hrs. Work-Hours/Day: **0.00** Hrs. Work-Time: **08:00**

Yearly Vacation 2021: **30.00** Day(s) Add Carry 2020: **3.00** Day(s)

Bank Code: IBAN:

Bank Account No.: BIC:

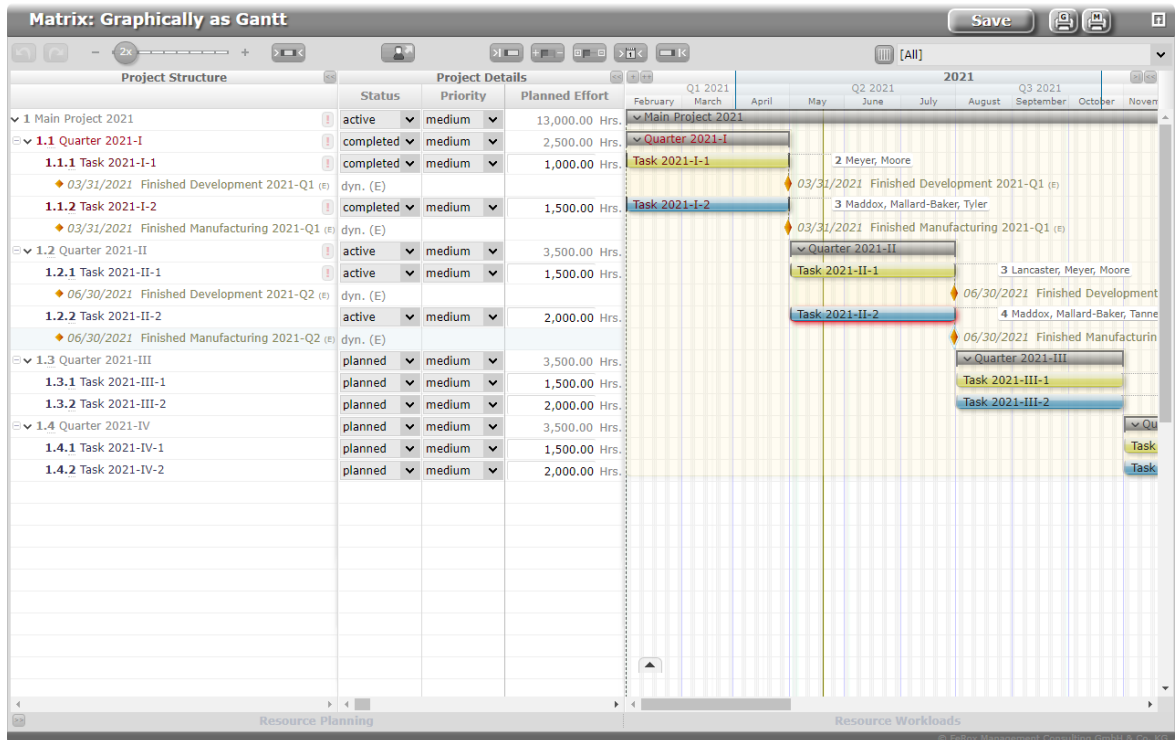
Handicapped: Flextime: Time Recording Check: Time Restriction:

Internal Annotation:

- 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	
Gerald Moore	Targ. Hrs.	Act. Hrs.	Rem. Hrs.	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	Start Break	End Dur.	
12. April 2021 - 16. April 2021	~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	17:00	08:00	15:00	
1.2.1 Task 2021-II-1 > Development [CE-0001]	04/01/2021-06/30/2021		medium	08:00	8:30	08:00	7:15	08:30	8:00	08:00	8:30	08:00	8:30	08:00	6:30	
2 [Unknown]				17:00	18:30	15:45	17:00							15:00	16:00	
3 +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	17:00	08:00	16:00	
4 +[Unknown]	04/01/2021-06/30/2021		medium													
Attendance Time From / Until:				08:00	18:30	08:00	17:00	08:30	17:00	08:00	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	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	

- 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

Dashboard

Selection for Project Overview

Project: 1.2.1 - Task 2021-II-1

Display

1.2.1: [2021-II-E] - Task 2021-II-1

Project

Project Number: 1.2.1
 PCA Code: 2021-04-08-000014
 Reference Number: 2021-II-E
 Name of Project: Task 2021-II-1
 Main Project: Main Project 2021
 Creation Date: 04/08/2021, 15:32
 Project Status: active
 Priority: medium
 Deadline: (Unlimited)
 Maximum Effort: (Unlimited)

Method

Remaining Effort in Hours
 On Request (Standard)

Documents

Number of direct documents: 0
 Number of indirect documents: 0

Ideal-Actual-Comparison

	Ideal Values	App. Values	Actual Values
Time Effort:	1,500.00 Hrs.	69.25 Hrs.	86.75 Hrs.
			+ 17.50 Hrs.
Time Span from:	04/01/2021	(Unlimited)	04/01/2021
Time Span to:	06/30/2021	(Unlimited)	-
Deviation:			-1,413.25 Hrs.

Planned-Actual: 5.78%
 Cost-to-Cost: 6.40%

Persons

Customer (Client): Customer AG LTD
 Contact Person: Paulson, Caroline
 Project Manager: Meyer, Paul
 1st Project Leader: Lancaster, Phoebe
 2nd Project Leader: (not defined)
 Budget Approval: Moore, Gerald

Additional Responsible Persons (2/2)

Assistance: Owen, Pamela
 Controlling: Moore, Gerald

Employee Allocation (3)

	Ideal Values	(%)	Actual Values	(%)	I/A
Lancaster, P.	499.95 Hrs.	33%	0.00 Hrs.	0%	0%
Meyer, P.	500.10 Hrs.	33%	0.00 Hrs.	0%	0%
Moore, G.	499.95 Hrs.	33%	86.75 Hrs.	6%	17%

Employee Allocation

Costs

Type of the Budget:

Internal Budget (Ideal Net)

	Persons	Mate
Int. Intended	45,000.00 €	7,5
Int. Approved	45,000.00 €	7,5
Int. Activated	45,000.00 €	7,5
Int. Planned	0.00 €	
Int. Used	2,608.14 €	7
Int. Remains	42,391.86 €	6,7

External Budget (Ideal Net)

	Persons	Mate
Ext. Intended	90,000.00 €	15,0
Ext. Approved	90,000.00 €	15,0
Ext. Activated	90,000.00 €	15,0
Ext. Planned	0.00 €	
Ext. Used	3,627.17 €	3
Ext. Invoiced	(418.44) €	(€
Ext. Remains	86,372.83 €	14,6

Actual Margin

	Persons	Mate
Δ Used	(1,019.03) €	(-4€
Δ Invoiced	-2,189.70 €	-6

Outgoing Invoice (Net)

Accounting Approach (Persons):
 Accounting Approach (Material):

- 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

Control Center

Overview of all current projects/tasks (sorted according to priority)

Available Not Available Free Overburd. Project Absent
 Leave (Appl.) Vacation Sp. leave (Appl.) Sp. leave Training (Appl.) Training
 Sick (Appl.) Sick Flextime (Appl.) Flextime

Current projects 04/19/2021-05/16/2021

Employee	Utilizat.	April 2021							May 2021																						
		CW 16	CW 17	CW 18	CW 19	CW 20	CW 21	CW 22	CW 23	CW 24	CW 25	CW 26	CW 27	CW 28	CW 29	CW 30	CW 01	CW 02	CW 03	CW 04	CW 05	CW 06	CW 07	CW 08	CW 09	CW 10	CW 11	CW 12	CW 13	CW 14	CW 15
Moore, Gerald (Int.)	$\frac{11.50 + 191.881}{152.00} = 128.00\%$	Task 2021-II-1																													

Enter Progress Estimation

No matching records found!

Documents (03/29/2021 - 04/25/2021)

Date Modified	File Name	Version	Size	Description	Changes
Backups (1) 04/09/2021					
04/09/2021, 12:11	fxp_mbackup1_202104091211_021001000.sql	1.00	286.82 KB	BACKUP DB V21.1	Upload
Emails (1) 04/16/2021					
Invoices (6) 04/19/2021-04/15/2021					
04/19/2021, 13:44	Sample-Invoice-3.pdf	2.00	218.28 KB	Incoming Invoice [KFR-2386476-M]	New file version uploaded
04/19/2021, 13:44	Sample-Invoice-2.pdf	2.00	188.85 KB	Incoming Invoice [AFR-5663]	New file version uploaded
04/19/2021, 13:44	Sample-Invoice-1.pdf	2.00	204.15 KB	Incoming Invoice [MFR-17-A-035-21]	New file version uploaded
04/15/2021, 15:31	Rechnung_AG-21-003.pdf	1.00	27.54 KB	Rechnung [AG-21-003]	Upload
04/15/2021, 16:03	Rechnung_AG-21-002.pdf	2.00	27.42 KB	Rechnung [AG-21-002]	Neue Dateiversion upgeloadet
04/15/2021, 15:30	Rechnung_AG-21-001.pdf	1.00	28.13 KB	Rechnung [AG-21-001]	Upload
Multi-User-Administration (1) 04/16/2021					

- 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)						
<input type="checkbox"/>	1.2.1 Task 2021-II-1	Moore, Gerald		X	0.00 €	40.00 €
Travel Costs						
• TE - Travel Expenses						
<input type="checkbox"/>	1.2.1 Task 2021-II-1	Inland Travel 04/06/2021, 08:00 - 04/08/2021, 19:00 ¹	Moore, Gerald	X	0.00 €	140.00 €
<input type="checkbox"/>		• Day Specifications (Homeplanet)	3x	X	0.00 €	44.80 €
<input type="checkbox"/>		• 3: Hotel (without Board)		✓	0.00 €	238.10 €
<input type="checkbox"/>		• 4: Parking		✓	0.00 €	15.83 €
<input checked="" type="checkbox"/>	1.2.1 Task 2021-II-1	Inland Travel 04/12/2021, 08:00 - 04/14/2021, 19:00 ¹	Moore, Gerald	X	0.00 €	140.00 €
<input checked="" type="checkbox"/>		• Day Specifications (Homeplanet)	3x	X	0.00 €	44.80 €
<input checked="" type="checkbox"/>		• 1: Hotel (without Board)		●	233.64 €	233.64 €
Material Costs						
• M-US - Usage (Material)						
<input checked="" type="checkbox"/>	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						
<input type="checkbox"/>	+ 1			X	0.00 €	0.00 €
<input type="button" value="+"/>	+ 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

Vacation/Timetable

Graphical overview of absent days and/or actual work hours

From: 04/01/2021 Cal. Display: Weeks Leave: Training: Sick: Flextime: Act.Hrs.:
 To: 04/17/2021 Department: *Sample Company Active Em.:

Display

Graphical display of the employees absent days and/or their actual work hours (Weekly overview)

Absent Leave (Appl.) Vacation Sp. leave (Appl.) Sp. leave Training (Appl.) Training Sick (Appl.) Sick Flextime (Appl.) Flextime

Time Span: 04/01/2021 - 04/17/2021	Leave Days			Vacation	Sp. leave	Sick	Flextime	Absent	Info	Q2 2021					
	Carry / Part (Annual) / Remain Vac. (Year)	Appl. / Vacation	Appl. / Sp. Leave							Appl. / Sick	Appl. / Flextime	Days	?	C13	C14
Project Worker															
Lancaster, Phoebe	0.00 1.00 (20.00) -2.00 (17.00) ¹	0.00 3.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00	?						
Maddox, Eric	8.00 7.00 (24.00) 10.00 (27.00) ¹	x x	x x	x x	x x	x x	x x	x	?						
Mallard-Baker, Elizabeth	-2.00 7.00 (24.00) 0.00 (17.00) ¹	x x	x x	x x	x x	x x	x x	x	?						
Meyer, Paul	4.00 8.00 (28.00) 3.00 (23.00) ¹	0.00 4.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00	?						
Moore, Gerald	3.00 9.00 (30.00) -5.00 (16.00) ¹	x x	x x	x x	x x	x x	x x	x	?						
Owen, Pamela	0.00 9.00 (30.00) 9.00 (30.00) ¹	x x	x x	x x	x x	x x	x x	x	?						
Palmer, R.	0.00 5.00 (24.00) 5.00 (24.00) ¹	x x	x x	x x	x x	x x	x x	x	?						
Tanner, Calvin	0.00 0.00 (0.00) 0.00 (0.00) ¹	x x	x x	x x	x x	x x	x x	x	?						
Tyler, Cindy	0.00 0.00 (0.00) 0.00 (0.00) ¹	x x	x x	x x	x x	x x	x x	x	?						

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- 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

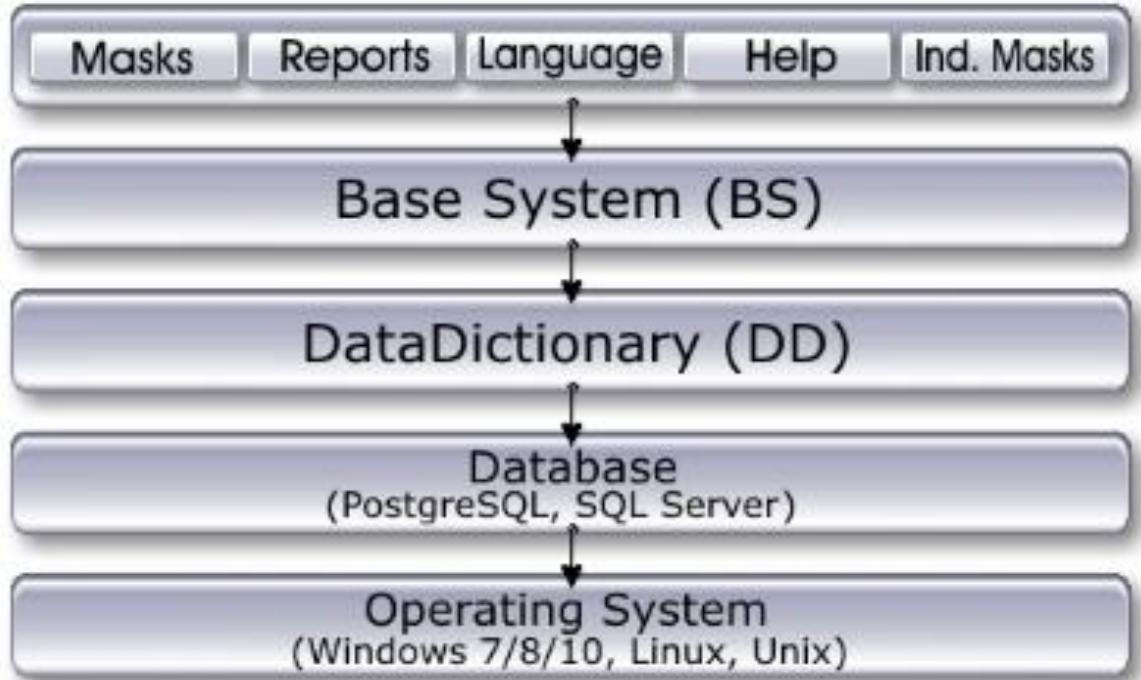
Access Rights Administration: Documents ✓
 → Projects/1 - Main Project 2021/1.2 - Quarter 2021-II/ Projectmanagement.pdf

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

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