



A wordpress plug-in for

Project Management

Introduction

This is a product of
mphatak.com
Authored by Manu Phatak.



Introduction

The goal of mphatak.com is
To expand and share
knowledge.





Project Summary

Plan, build, and manage projects

Identify and delegate tasks

Manage progress

Centralize team information



Similar to Microsoft Project



Similar to Microsoft Project

....but better.



Microsoft Project doesn't work

unless

everyone has Project Professional

and

someone is hosting Microsoft Project Server...



Microsoft Project is out...

=(



Problems to address

Communications
Record Keeping
Accountability



Problems to address

The larger an organization
the harder it is to manage project communications.
Small organizations can have this problem too.



Don't lose when the ball lands between two people.



Problems to address

Accountability is...

Knowing who to go to
When things go wrong, and
When things go right.

aka

Giving people an incentive
To fill gaps.



Objectives

Integration + Collaboration + Centralization
Innovation



Objectives

Wordpress creates a platform
that allows teams to interact with each other.

Why not **integrate** the project management interface with
the existing platform?

Integration.



Objectives

Teams can work together

Plan, coordinate, and manage a project
without software restrictions.

Collaboration.

Objectives

~~Every project → team/group~~

Every project → one person

Accountability.



Key Benefits

Results

Get things done.

Work history

Track past projects success, failure, and the people that drove them.


Simplicity and effectiveness

No more overhead training.



Designing the Interface

...of a project management plug-in.



Case Study

Jenkintown Publishing

Who would use this tool?

Let's follow a magazine publisher.

Notice how to use the tool.

How teams interface with the tool.

Output – Active Projects

Milestone	Contact	Status	Due	Notes
New Website	Jill	Yellow	01/20/08	0
Build a task list	Jill	Done	01/05/08	2
ID requirements	Jill	Done	01/10/08	0
Design a prototype	Ted	Yellow	01/15/08	5
Development	Jill	Not Started	01/20/08	2
Theme for wordpress	Jill	Not Started	01/20/08	1
Custom functions	Ted	Not Started	01/20/08	1
Reorganize the file cabinets	Sandra	Red	01/15/08	2
Design the new layout	Dave	Red	01/05/08	3
Move the cabinets	Ed	Not Started	01/15/08	0

Articles	Contact	Status	Due	Notes
Headlines	Sandra	Yellow	01/05/08	0
Interview	Susan	Done	01/12/08	2
Notify Interviewee	Brian	Done	01/08/08	0
Interview	Mike	Yellow	01/12/08	5
Guest Writer	Dave	Not Started	01/19/08	2
Comics	Scott	Not Started	01/26/08	1



Hello, I'm a project.

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And I am a task.

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Categories

Notice two project categories:

Milestones and Articles

Articles is a custom category—it's a publisher.



Project Hierarchy

Each category consists of projects
...just a way of organizing data.

Each project can be divided into tasks
And tasks into sub-tasks



Project Assignment

Notice

Each project is assigned to one person

also notice

Tasks can be delegated to other people

Other than the project owner



Project Metadata

Each project and task **also** has
A due date and status

Project Status

Codes

Green → on schedule

Yellow → at risk

Red → deadline missed (auto + notifications)

Not started

Completed



Status Assignment

Derived Status

Status of project with children

Is derived from the childrens' status

For Example

If a task goes red

Its entire parent project goes red.



**Let's review the details of a
project**

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Output – Individual Projects

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Design the new layout	Dave	Red	01/05/08	3
Move the cabinets	Ed	Not Started	01/15/08	0

Project Details

Category	Milestone
Time Period	January
Description	N/A
Stakeholders	Jill, Ted

Notes

I have not been able to find the floor plan
Dave 01/03/08

This should be done by now. I have to
change the status to red.

Sandra 01/05/08



Individual Projects Screen

This screen drills down on a project
Displaying additional details.

Output – Individual Projects

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Move the cabinets	Ed	Not Started	01/15/08	0

Project Details

Category Milestone

Time Period January

Description N/A

Stakeholders Jill, Ted

Notes

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Sandra 01/05/08



Time Period

To phase out the old stuff

Projects are assigned to a time period.

Time periods can be customized by the user:
For example Months, Quarters, weeks, or even years.

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Project Details

Category Milestone

Time Period January

Description N/A

Stakeholders Jill, Ted

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change the status to red.

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Stakeholders

Emails will be sent for everything.

Anyone that's concerned with a project

Would be added as a stakeholder.

They would be included in the emails.

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Notes

Notes are like comments...

They won't supplement email.

Notes are for logging relevant info.

For example changes, updates, concerns, etc.



**We can also drill-down to a
project-task**

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Dave 01/03/08

This should be done by now. I have to
change the status to red.

Sandra 01/05/08

Output – Individual Task

Task	Contact	Status	Due	Notes
Design the new layout	Dave	Red	01/05/08	3

Task Details

Project	Reorganize the file cabinets
Description	Find the most ergonomically functional layout for the file cabinets

Notes

A new cabinet was just added.

Dave 01/01/08

The department just agreed to build an annex.

Sandra 01/01/08

I got the permits we need

Dave 01/03/08



Individual Tasks Screen

Again,

Displaying **even** more details.

Output – Individual Task

Task	Contact	Status	Due	Notes
Design the new layout	Dave	Red	01/05/08	3

Task Details

Project Reorganize the file cabinets

Description Find the most ergonomically functional layout for the file cabinets

Notes

A new cabinet was just added.


Dave 01/01/08

The department just agreed to build an annex.

Sandra 01/01/08

I got the permits we need

Dave 01/03/08



Notes, again

The details are the same.

The notes are specific to the task.



Now you know

What to expect.



Other outputs

User-activity reports

See task lists by user

Red-light projects

See projects that are missing a due a date.



Did you get everything...

Here's a quick review.



Project Management

Figuring out what the system should do.

Planning.



Project Management

Key Features.

- Manage task assignments.
- Close communication gaps.
- Create a log of work history.



For next time

Look out for input interfaces, database structure, and a class structure.



Questions?