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## 1. INTRODUCTION

Open WorkBench is an open source project management tool that assists in the generation of project schedules.

Some key features of Open WorkBench include

- Open source
- Free
- Alternative to Microsoft Project
- Stand-alone windows-based desktop application

The catch

- The commercially available upgrade of Open WorkBench comes at a cost. It is available from Niku, has a richer feature set and is also workgroup or enterprise-wide application.

## 2. PRODUCT

### 2.1. Installation

Application

- wbsetup-1.0.exe (or above)
- Requires version 1.3.1 or later of Sun's Java Runtime Engine. Version 1.4.2 of the JRE can be downloaded from <http://www.java.com>

### 2.2. Documentation

Manuals

- Using\_Open\_Workbench\_1.1.pdf
- Open WorkBench|Open\_Workbench\_Release\_Notes\_1.1.pdf

### 2.3. Website

Website

- <http://www.openworkbench.org>

## 3. WORKBENCH FEATURES

There are many features in WorkBench which cover aspects of project management that are currently not required in the day to day management of projects at ADA.

The core project management requirements for ADA are

- Project Planning (scheduling via Gantt Charts)
- Project Tracking (periodic task recording of actual hours versus estimated hours)

WorkBench is capable of meeting these requirements.

### 3.1. Project Planning

- Gantt chart project
- Task definition

- Task dependencies
- Resource Assignment
- Calender tailoring for specific holiday and leave entitlements
- Setting baselines

### **3.2. Project Tracking**

- Recording task estimates
- Recording task actuals
- Recording task percentage complete

## **4. EXAMPLE**

Many people grumble about the amount of time spent managing a project schedule via Microsoft Project, well, WorkBench is no different, apart from the fact that we no longer have to pay Microsoft for the privilege.

I put together a quick start example on the basics of Open WorkBench that will hopefully lessen the amount of grumbling.

### **4.1. Project Planning**

#### **4.1.1. Gantt Chart Project**

Create a project file.

- File -> New
- File - > Properties -> Name -> "Demonstration"
- File -> Save -> Demo

#### **4.1.2. Task Definition**

A WorkBench Gantt chart can be defined as a series of phases and tasks. When defining project phases and tasks, WorkBench assigns an attribute "task" to each task name by default. In the case where a task name is a project phase, the attribute must be changed to "phase" by

- Highlight and double click the row of the specified task name
- General -> Type -> Phase

By default the duration of each task name is set to 1 day. Once all tasks and phases are defined the project should look similar to

ID	Name	Start	Finish	Mon 31	Tue 01	Wed 02	Thu 03	Fri 04
	<b>Phase 1</b>	<b>31/01/200</b>	<b>31/01/200</b>					
	Task 1-1	31/01/2005	31/01/2005					
	Task 1-2	31/01/2005	31/01/2005					
	Task 1-3	31/01/2005	31/01/2005					
	<b>Phase 2</b>	<b>31/01/200</b>	<b>31/01/200</b>					
	Task 2-1	31/01/2005	31/01/2005					
	Task 2-2	31/01/2005	31/01/2005					
	Task 2-3	31/01/2005	31/01/2005					
	<b>Phase 3</b>	<b>31/01/200</b>	<b>31/01/200</b>					
	Task 3-1	31/01/2005	31/01/2005					
	Task 3-2	31/01/2005	31/01/2005					


### 4.1.3. Task Dependencies

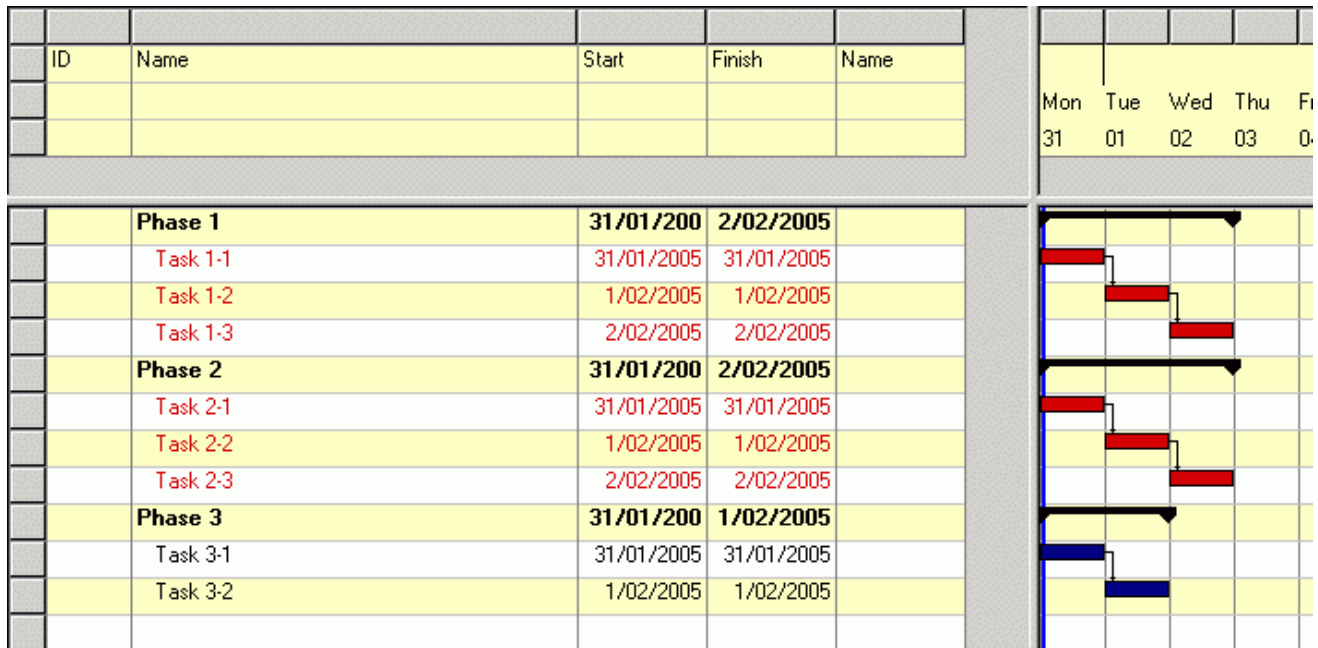
To assign task dependencies

- Left click and drag on the task bar predecessor (in blue or red in the case of a critical path task))
- Drop on the task bar successor
- Repeat for all dependant tasks
- Inter-connecting dependency lines should be automatically drawn between the dependent tasks


Autoschedule

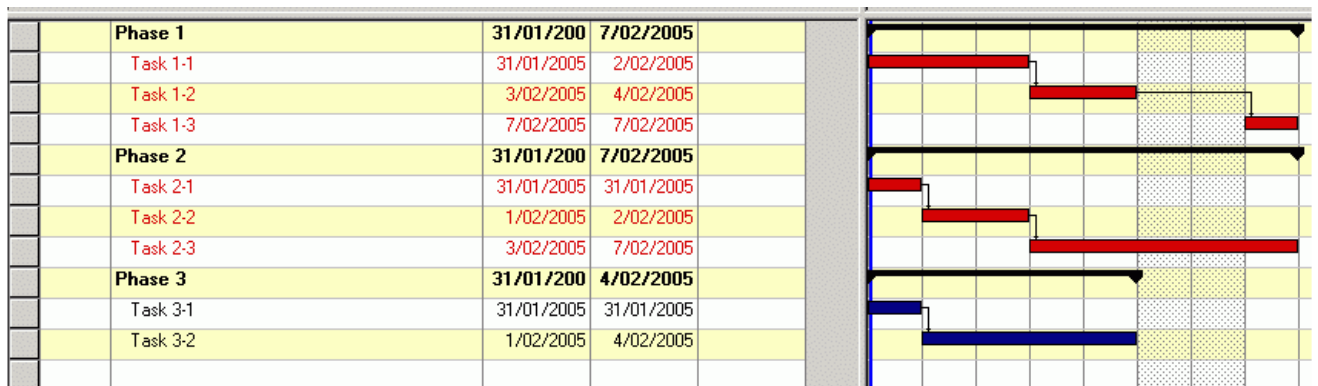


- Click on the auto schedule button  to cascade task dependencies
- Phases highlighted in red are on the critical path
- Phases highlighted in blue are not on the critical path



A quick way to alter the duration of a task

- left click and drag on a task bar (red or blue) and drop when the desired duration is reached.
- Weekends and other specified holidays (defined in the calendar) are excluded from the task duration calculation.
- Click on the auto schedule button to re-calculate the duration of each project phase 



#### 4.1.4. Resource Assignment

Handling resource lists of a project.

Note in the example that follows a Resource Name column has been added to the Gantt View. To do this

- Right click on the Gantt Chart icon -> Edit
- Insert a new column after Task Finish, Right click column -> Insert
- Resource Tab -> Resource Information -> Description -> Name
- Drag and drop the Name field in the new column after Task Finish

Assigning Resources

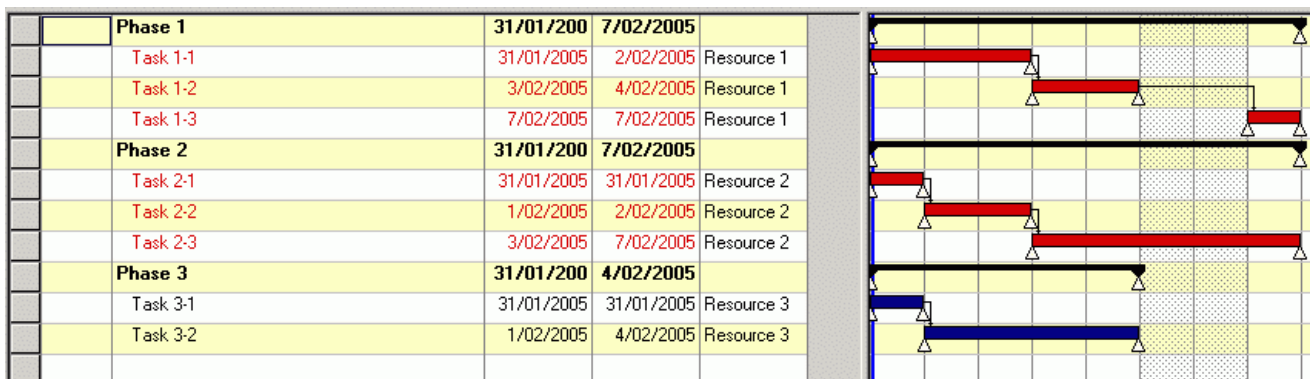
- Create a list of resource names (eg. Resource 1...3)
- Assign a resource ID to each (eg 1-6 ... 1-8)
- Select a list of tasks for assignment (highlighted in black)
- Left click -> Assignments -> (select from Project Resources list)
- Click on Assign and the resource name should be assigned to all highlighted tasks

ID	Name	Start	Finish	Name
<b>Phase 1</b>				
	Task 1-1	31/01/2005	2/02/2005	Resource 1
	Task 1-2	3/02/2005	4/02/2005	Resource 1
	Task 1-3	7/02/2005	7/02/2005	Resource 1
<b>Phase 2</b>				
	Task 2-1	31/01/2005	31/01/2005	
	Task 2-2	1/02/2005	2/02/2005	
	Task 2-3	3/02/2005	7/02/2005	
<b>Phase 3</b>				
	Task 3-1	31/01/2005	31/01/2005	
	Task 3-2	1/02/2005	4/02/2005	
1-6	Resource 1			
1-7	Resource 2			
1-8	Resource 3			

4.1.5. Schedule Baseline

A baseline for a schedule

- can be set or cleared Tools -> Baseline
- the baseline is represented via triangular symbols



4.1.6. Calendar Tailoring

To cater for a workplace’s public holidays and individual’s annual leave, the calendar can be modified for all non-working days. The duration of tasks are automatically adjusted for all non-working days.

- Tools -> Calendar -> (Select calendar name)

- Specify the non working days

## 4.2. Project Tracking

### 4.2.1. Recording Task Estimates

In order to track schedules, an estimate (in hours) of the task effort is required. In cases where a task is assigned to a single resource, the task duration will be the same as the estimated task effort.

- Highlight and double click the row of the specified task name
- Resource -> Estimate -> (Enter effort in hours)

If a task is under resourced, i.e. the estimated effort required exceeds the specified duration, the task row and the daily resource effort cell will be highlighted in a darker yellow (see example below). In such a case either additional resources are required for the task or the duration needs to be lengthened.

ID	Name	Start	Finish	Name
	<b>Phase 1</b>	<b>31/01/200</b>	<b>7/02/2005</b>	
	Task 1-1	31/01/2005	2/02/2005	Resource 1
	Task 1-2	3/02/2005	4/02/2005	Resource 1
	Task 1-3	7/02/2005	7/02/2005	Resource 1
	<b>Phase 2</b>	<b>31/01/200</b>	<b>7/02/2005</b>	
	Task 2-1	31/01/2005	31/01/2005	Resource 2
	Task 2-2	1/02/2005	2/02/2005	Resource 2
	Task 2-3	3/02/2005	7/02/2005	Resource 2
	<b>Phase 3</b>	<b>31/01/200</b>	<b>4/02/2005</b>	
	Task 3-1	31/01/2005	31/01/2005	Resource 3
	Task 3-2	1/02/2005	4/02/2005	Resource 3

ID	Name	Estimate	Actual
1-6	Resource 1	24.00	

ID	Name	Category
1-6	Resource 1	
1-7	Resource 2	
1-8	Resource 3	

1-6	Resource 1																		
1-7	Resource 2																		
1-8	Resource 3																		

### 4.2.2. Recording Task Actuals

Once a schedule is up and running three task attributes require periodic updating.

Task status - a selectable pull down menu attribute.

- Highlight and double click the row of the specified task name
- General -> Status -> (Not started, Started, Completed)
- The task bar changes colour to reflect status  
(Red / Blue – Not Started)  
(Purple – Started)  
(Grey – Progress completed)
- The task name changes colour to reflect status  
(Red – Not Started)  
(Purple – Started)  
(Green – Completed)

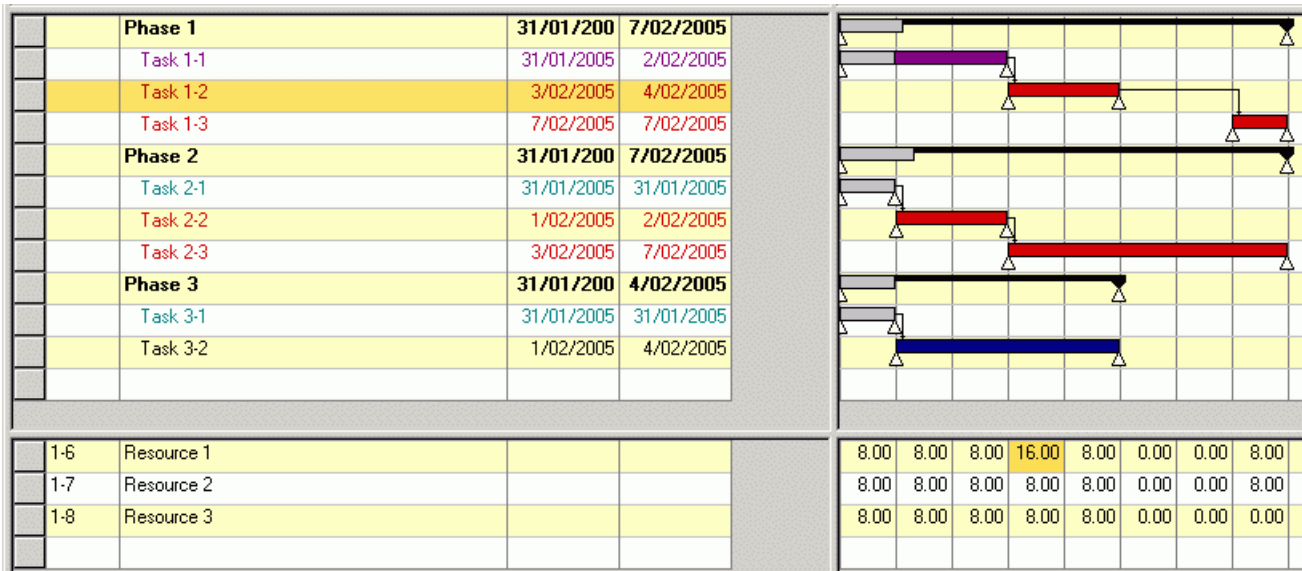
Task actuals – the progressive actual hours expended in completing a task

- Highlight and double click the row of the specified task name
- Resource -> Actual -> (Enter lapsed hours for a task)
- The Estimate attribute is automatically adjusted upon an Actual update

Task Estimated – an estimate of the hours required to complete a task

- Highlight and double click the row of the specified task name
- Resource -> Estimate -> (Enter estimated hours required for task completion)
- If a task is on schedule, Estimate + Actual = Duration
- If a task turns a darker yellow it is under resourced or has slipped.





You can re-schedule the Gantt by clicking on the auto schedule button.



The Gantt will be re-calculated based on the new estimated task completion dates. Deviations from the triangular baseline symbols will be displayed.

### 4.2.3. Recording Percentage Complete

Not a recommend method for tracking actuals. Past experience has shown that as difficult tasks approach the pointy end of a delivery date, they have a tendency to get stuck on 90% complete. The remaining 10% surplus effort is more often than not exceeded. It's far more meaningful to capture regularly updated estimated time to complete data by recording actuals and estimated hours to completion.