

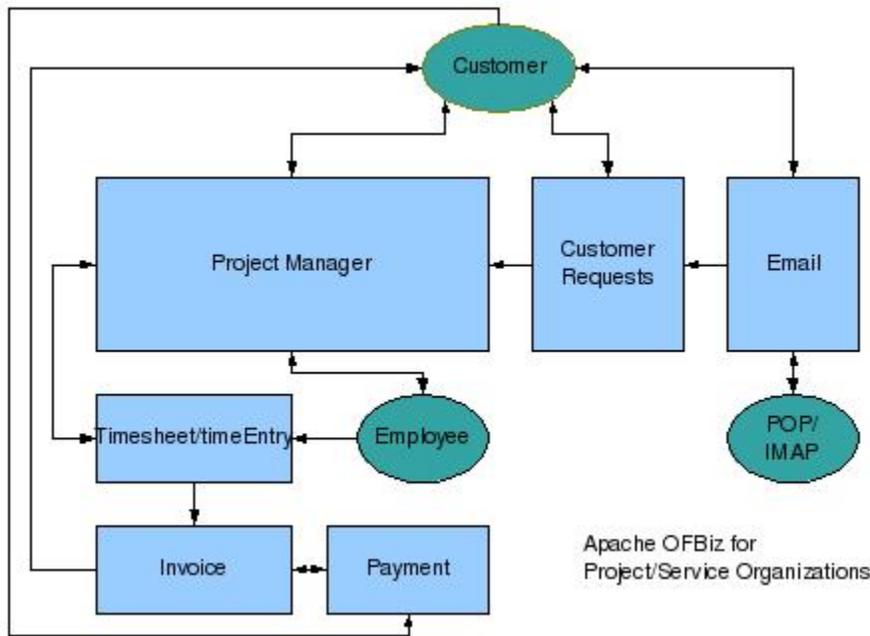
OFBiz in a service and project oriented company

Introduction.

Below follows a description how OFBiz can be used to support activities in a project/service driven organization. We, in Antwebsystems started using OFBiz more than 3 years ago for basic accounting, email and the website. Now, since about three months we also use it for processing customer requests, timesheet registration, email and generation of invoices from timesheets. The main parties in these activities are customers and employees. For both these groups of people special screens were created in the 'myPortal' component which was added for this purpose. Employees can use email, timesheets and can assign tasks. A document library function is planned.

Earlier this year the projectmanager was completely revamped by us to be able to administer projects. The manager is modelled after the major projectmanagers on the market of which i used a few before. It supports projects, phases and tasks and projects can be grouped as sub-projects inside another project to have an unlimited tree structure. All information is maintained on the task level but can be shown aggregated at the phase or project level. A weekly timesheet function is included where time can be reported on tasks from the project.

Invoices can be generated on a project level for a certain time period for timesheets which are approved. As long as the invoice is in preparation, the process can be repeated to allow the correction of errors.



System setup.

We assume you have your customers and employees already in the party manager. With the project manager it is not possible to create new users, only use the users which were entered in the party manager. You have to make these parties available in the project manager under resources. Then you can create your first project. On that project you can add the parties who will participate in the project. In this case you can select from projectmanager resource list. Then create a phase called 'User Requests'.

From this point on you can add more phases, tasks and taskrelationships. The system also contains a scheduler who will enter the estimated dates for you based on the defined task dependencies and planned/actual duration of the tasks.

The last action, adding more phases, is not really required if you want to use the Customer requests only.

To Allow a customer to login to the system and see his customer requests and invoices, in the partymanager add a userlogin to his party record and assign this userlogin to the MYPORTAL_CUSTOMER permission group. If you want this customer to see a project overview and gantchart, add this person to the projectmanager with the role client* and add this person to the project resources. If you want a number of people from the same company to see each other customer requests make sure they are all contacts of the same account. This can also be arranged in the partymanager under 'relationships'.

To allow a employee on the system, create for him/her a userlogin with the 'MYPORTAL_EMPLOYEE' or 'MYPORTAL_EMPL_NOEMAIL' permissiongroup to allow him to send email from the system or not. The employee can (re)assign tasks, see his profile, use the timesheet and see the company calendar.

The Customer Request function.

We receive customer requests either by email or directly as customer requests. When they come in per email there is a function in myportal to create a customer request from the email. The customer will receive a notification the customer request is created. These new customer requests show up under the 'request' button in the project manager where the project administrator can create or assign them to tasks in projects and optionally assign them to employees. Attachments on the email are copied over to the project task.

Either the employee is looking for the next open task in his project or a task related from a customer request was assigned to him. In his task list he can set the status of the task is complete. At that moment the status of the related customer request is also set to complete and the customer is notified by the system. The employee is able to add notes to the customer request telling the customer how to use the change or other information. If a note is added the customer is also notified with an email containing the note.

In the project manager, the administrator can see all open customer requests and follow up if they are really done.

The email function

The email function is rather different from a 'normal' email client. It has however a big advantage, email is not only stored for the person who sends or receives it, but is also stored in the customer record. So any email this customer had with anybody in the company is kept. When employees leave the company email is not lost. Further it is possible, when arranged, to read/write other people's email. It is also possible to search the email which was send or received by anybody in the company. Finally it supports the basic functions like reply and forward. Incoming email from unknown parties are flagged and can either be deleted on entry or a new party can be created using the info from the incoming email.

The timesheet function.

The employee is also able to report the time he is working on a task in a weekly timesheet. In the timesheet it is also possible to indicate that his part of the task is finished. If all participants on a task indicate they are finished the task status will change and also the related customer requests.

The Invoice generate function.

If employees can report their worked time in timesheets. Then it is possible on a project level to create an invoice in the preparation status for a certain time period in the accounting manager. This is done with the 'billing' button on the project detail screen.

This concludes this description. Any comments are welcomed and i would like to urge other OFBiz software development companies to use the product they support: OFBiz.

Most of these functions were build and sponsored by Antwebsystems Ltd: quality OFBiz services for competitive prices.