



Instruction manual

Marlin Project

Introduction

In this instruction manual are describes the basic functionality of Marlin Project.

Step 1:

Start an internet browser and open <https://start.pcamobile.com>

AUTHENTICATE

Company:	<input type="text"/>
Username:	<input type="text"/>
Password:	<input type="password"/>
Remember me:	<input type="checkbox"/>

[Password forgotten?](#)

Step 2:

Log in and open the Marlin Project application



Project

Schedules

At the bottom of the page you will find the schedules. This concerns the schedules per executive that are recorded in Marlin. In addition, there is a possibility to run reports from Marlin Project.

The following reports can be printed in Excel:

- Project report – Number of scheduled hours on the project in Excel overview.
- Realization report - Overview of the planning budget vs. The actual hours worked.
- Skills vs. The commitment – What did each employee make in actual hours. What is the remaining capacity in a certain period. Provides insight into whether there is sufficient capacity to take on work in a future period or not.

Planning board

In the planning board the projects are displayed. There are three levels to be distinguished in project planning, namely: projects, work orders and tasks.



Projects

The first button is for adding a new project. Beside you can also use this button to import, schedule or delete a project via this button. If you want to add a project, the screen below appears. In this screen you can describe all the details of the project. The screen is subdivided into: project, customer and planning conditions.

The screenshot shows a 'Project' form with the following sections:

- Project:** Code, Referentie, Omschrijving, Info, Periode (Ingangsdatum, Einddatum), Tijdsduur (1w 2d 5h 3m), % gereed (slider).
- Klant:** Naam (Voornaam, Tussenvoegsel, Aanhef), Telefoon (Telefoon, Mobiel, Fax), Email, Adres (Straat, Huisnummer, Toev.), Plaats (Postcode, Plaats).
- Planning voorwaarden - Uitvoerende:** Aantal (1), Regio (dropdown), Vaardigheden (search), Verplichte uitvoerenden (search), Voorkeurs uitvoerenden (search), Niet in te zetten uitvoerenden (search), Te vermijden uitvoerenden (search).

Buttons at the bottom: Toevoegen, Verwijderen, Plannen, Herstellen, Bewaren.

Project

In the left side are the description and information concerning the project. In addition, you must enter here the period within which the project must be carried out. With duration you enter how much time is needed to complete the entire project.

Customer

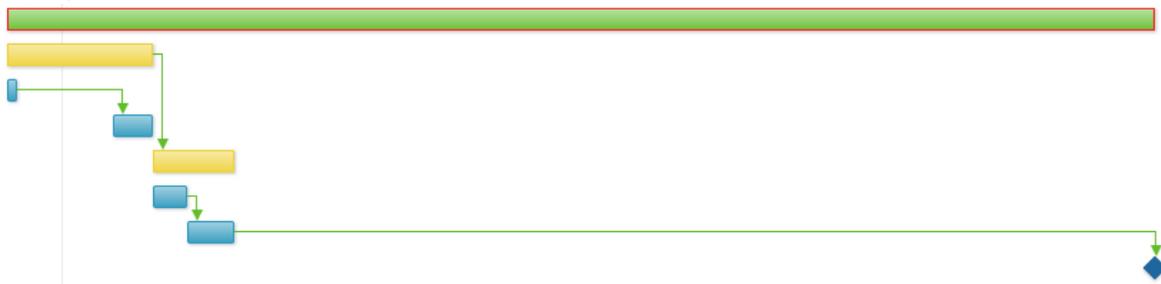
The customer's details are entered under the customer heading. It is important that the address is entered correctly, so that travel time can be optimally taken into account during automatic planning.

Planning conditions

Here you can indicate how many executors are part of the project. You can then indicate which executive you prefer or who must perform the work. Further You can also indicate which skills the fitter must possess in order to carry out the project.

Create workorder and task

When creating a work order and a task, you must go through the same steps as described above in the project. After the project is created and the corresponding work orders and tasks, these schematically will be visible on the plan board. Dependencies and milestones can then be added to the project.



Above is a schematic representation of a project represented, as in the Marlin Project planning board is shown. The green bar displays the project. The yellow colour stands for a work order. Finally, the blue colour gives a task again.

Besides, it is possible to move the entire planning, for example if the delivery of the material is delayed. Click on the green bar and move to the right or left to move the entire schedule.

Mijlpaal toevoegen

Milestones

You can above the planning board add a milestone. A milestone is a work order with no duration. This can be moved.

Dependencies

It is possible to add dependencies to a (part of the) project. This means that for example task 1 of work order 1 must first be carried out before work 2 of work order 1 can be started. A dependency can be added by using the mouse to select one task, work order or project up to another task, work order or project.

Toon kritieke pad

Critical path

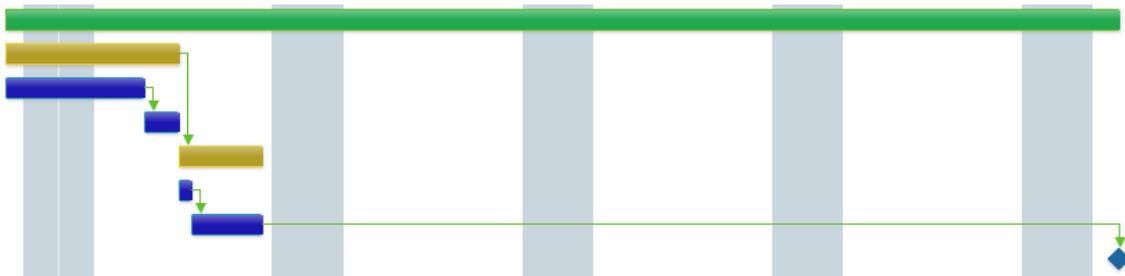
Allow to see which are the most important tasks from the project. If the lead time of this task is not achieved, the entire planning (entire project) will be delayed.

Display planning board

It is possible to increase or reduce the view of the planboard. On the right-hand side under Settings you can choose to view per day, week or month. Beside it can be indicated above the planning board how many days, weeks or months are then visible on the planning board.

Automatisch plannen

After the project has been created, work orders, tasks, dependencies and milestones have been added, the tasks can be scheduled. Select a project and then click on plan project. The project will now be scheduled automatically, taking into account the planning conditions.



Once the project is scheduled, the colours of the three levels become darker, as shown above. Beside you can see at the bottom of the planning for whom a task has been scheduled.

Capture baseline

It is possible to capture the baseline of a project. This means that there is a snapshot of the status of the project is being captured in a photo at that moment. This can be of added value to compare the old and new planning of the project at a later stage. So that insight can be made on how differences occurred during the planning of the project.



Marlin planning board

It is also possible to see the planning of the tasks in Marlin. Via the Marlin planning board, it is also possible to shift a task to another time or technician. This can be done manually by the task select and drag to the desired time and technician. This will then be implemented automatically in Marlin Project, if you refresh the page.