

# MindPlan

New Features in Version 3.3

Status December 1<sup>st</sup>, 2011



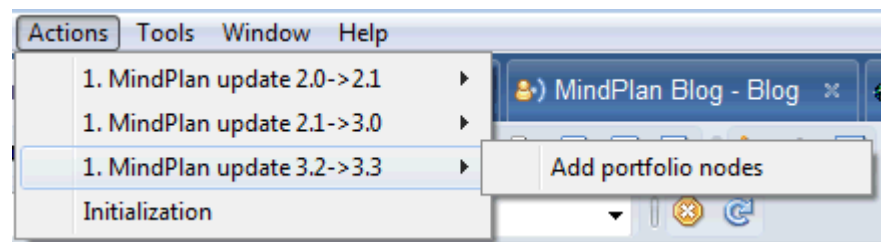
## Weilgut MindPlan 3.3 Release

The release fixes a few issues of version 3.2 and introduces one major new feature in the MindPlan application itself (Portfolio maps) as well as other additional functionality added to the combination of MindPlan and the Haus Weilgut eOffice CRM system.

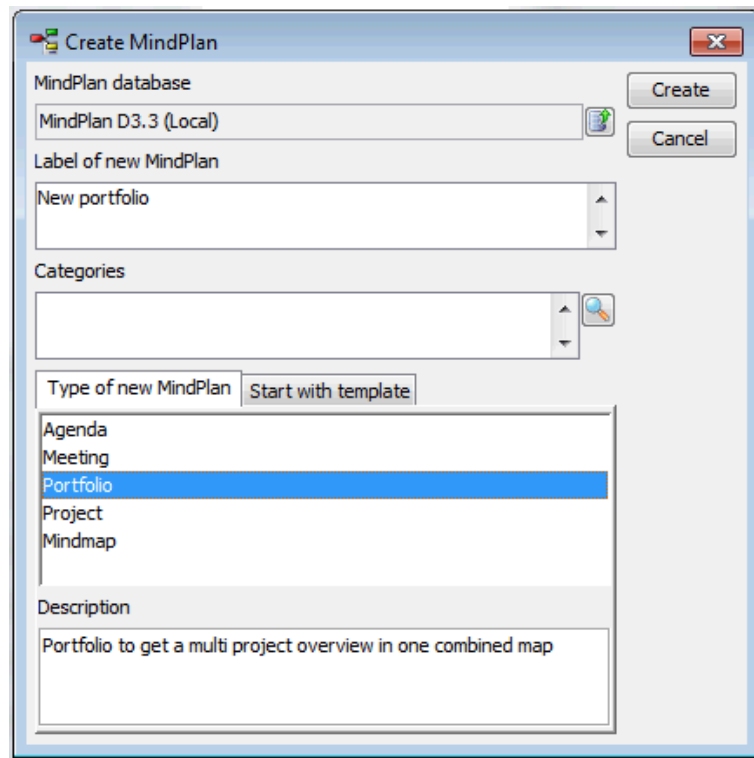
### Portfolio maps

Portfolio is the name of a new root node type. It enables you to create a kind of "meta map" that pulls project relevant information from linked projects, project deliverables and even single activities with the click of a button. This project data is stored permanently into the MindPlan link nodes of a portfolio map. It's visible in both Map and Gantt view.

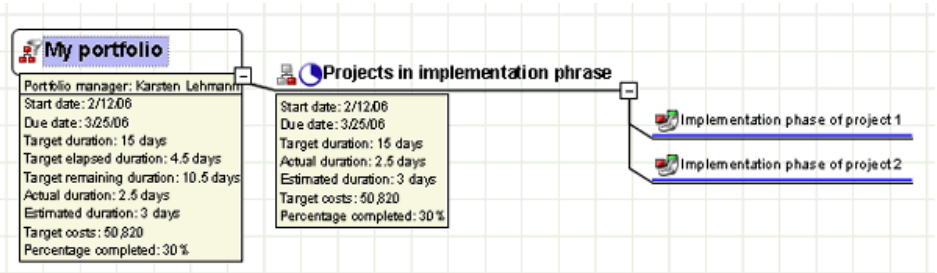
To work with Portfolio maps, you need to upgrade to version 3.3 and then run the agent "1. MindPlan update 3.2 -> 3.3 / Add portfolio nodes" in the MindPlan configuration database (should be done only once by your Administrator):



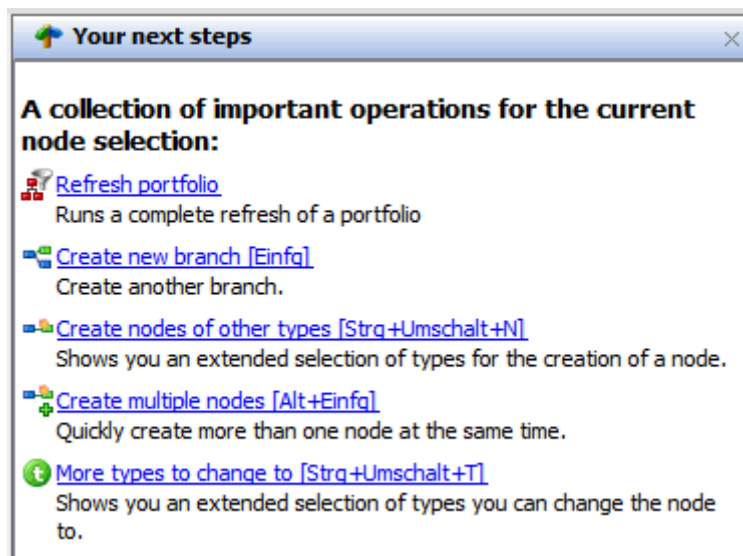
The new root node type becomes available in the "New MindPlan" dialog after a restart of the MindPlan application:



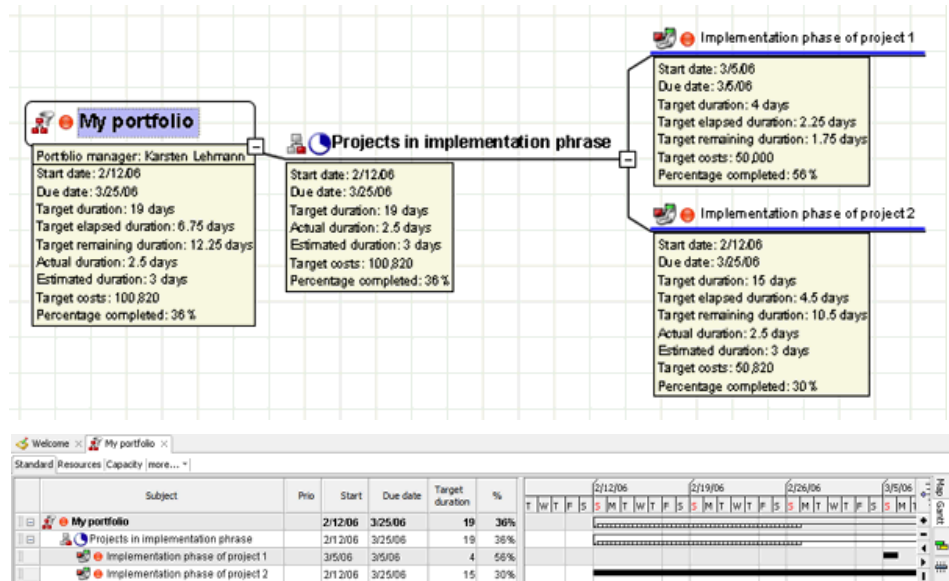
In your new Portfolio MindPlan you then create MindPlan links to project nodes, deliverables or activities in the same database or even in a completely different one:



The project data is transferred from the linked nodes into the MindPlan links by using the action "Refresh portfolio" of the "Your next steps" sidebar panel:

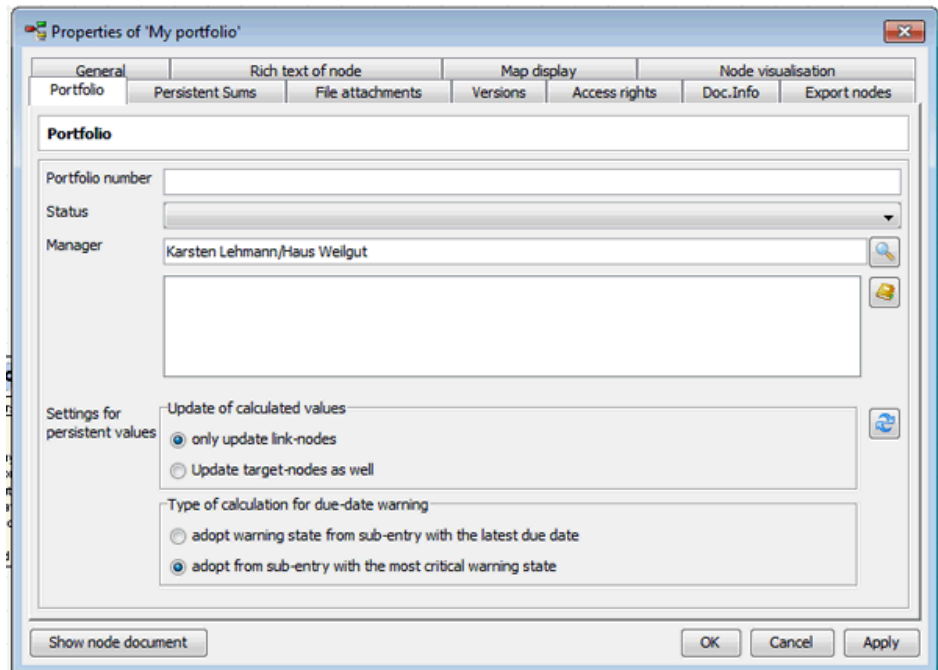


There it is, your "one click multi project overview" in Map and Gantt view:



The red icon that you can see next to the link node title is a so called "due-date warning indicator". It is displayed when the linked node has assigned activities that are overdue.

The properties dialog of the Portfolio root node contains a few settings to configure the exact behaviour of the Portfolio analysis process:



With the option "Update of calculated values: Update target-nodes as well" you can make the portfolio process also write the project data into the linked node. This can be handy if you would like to display this data using classic Lotus Notes views.

## New features in combination with CRM functionality

- additional information in the project form: risk analysis, stateholder, project participants
- Status reports for different target audiences
- Automation of standard processes by using workflows
- Integrated helpdesk system: assign support requests to projects, synchronize progress between the two
- close integration into Weilgut Document Management System (DMS) and into the Weilgut group calendar
- activity synchronization and management with Weilgut ToDo Manager without media discontinuity
- direct assignment of time records to MindPlan project activities