



Gap Analysis Module

User Manual

Project Name:OpenERP implementation
Project Phase:Gap Analysis
OpenERP Application:.....Project
Date:.....2013/06/28
Name and version of the Document:.....gap_analysis_how_to.doc

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1. Introduction

1.1. Introduction

This document provides a simple user guide for the modules gap_analysis developed on April 2013 for OpenERP v6.1 by Elico Corp.

The aim of the GAP analysis is to analyze the difference between OpenERP basic modules and company concepts and how to achieve their goal, which is in order to help the company to generate project quotation which include money, time and describe.

There are 4 different modules which cover several aspect of the gap analysis:

- gap_analysis: main core of the gap analysis functionality (setup, import/export).
- gap_analysis_aeroo_report: allows the reporting in aeroo
- gap_analysis_project: necessary to generate the project from the gap analysis
- gap_analysis_project_long_term: necessary to generate the project from the gap analysis (with phasing)

An updated version of the module is available at:

- <http://v6apps.openerp.com>
- <https://code.launchpad.net/~openerp-community/openobject-addons/elico-6.1>

1.2. Evolution

This document will evolve through time with reviews and comments. The table below will archive the versions with detailed information.

Versio n	Author	Date	Description
0.1	Eric CAUDAL	2013/06/28	Initial documentation

1.3. Questions and remarks

If you have any questions on this document you can contact:

- **Eric Caudal** (Project Manager at Elico): eric.caudal@elico-corp.com

2. Setup and Definitions

2.1. GAP Analysis elements

- **Control** – If customer need it then put **Keep** in it. If customer think it not necessary then **Drop**
- **Category** – Function should belong to which category which already defined in our OpenERP system, for more detail please see figure.1
- **Functionality:** short description (will be used in the task name when creating the project)
- **Description** – Describe full details of the functionality (will be included as description in the task.
- **Critical Level** – a score between 1 and 4 that represents the importance of the requirement for the contributors
 - 1: Nice to have
 - 2: If have, better for company to use the system
 - 3: Very useful
 - 4: Compulsory.
- **Phase** – Identify this task should done in which project phase. Phases are create on the fly when creating the project
- **Contributors** – Who provide information for this task
- **OpenERP Solution Mapping** – Which OpenERP module can be used for this task.
- Identify the time may spend on those (in hours): **Basic Reports, Advanced Reports, Basic Processes, Advanced Processes, Basic Screens, Advanced Screens, Basic Workflows, Advanced Workflows, Access Rights Grops, Objects, Calculated Fields, Basic Wizards, Advanced Wizards**
- **Effort** – a score between 1 and 5 that represents the effort it would take OpenERP Inc. to implement the requirement.
 - 1: Feature already exists as is in OpenERP, Can be down in one hour;
 - 2: Feature already exists in OpenERP and requires configuration (like a rule or a switch), no development involved, however may need more time which about two hours
 - 3: Feature doesn't exist in OpenERP and requires a small (less than 4 hours) custom development (no change in the existing logic);
 - 4: Feature doesn't exist in OpenERP and either requires a heavy custom development (more than 4 hours) like a new module or a change in the existing logic;
 - 5: Not enough information to identify the necessary development we need more detail

- **# hours if Effort = 4** - specific the exactly number of hours should spend on this task.
 - **Test** – number of hours spend on test
 - **Training** – number of hours spend on training
 - **Project Management** – number of hours spend on project management
 - **Estimated Investment** – it will auto generate by our own OpenERP system.
- Include
- RMB – Price in RMB
 - Analysis – Total Time spent in analysis the project (in hours)
 - Dev – Total time spent in development (in hours)

2.2. Other setup

Functionality Categories: necessary before the import

Workload type: Report Code to be used in import/export Excel. Duration: Default duration for the given workload.

Effort: Specify the default duration or click on “undefined duration” which allows you to specify a duration in the gap analysys.

Functionalities: can be prefilled. If the name matches during the import the setup of the existing functionality will be used instead. The code is used to generate a numbering of all the functionalities.

2.3. Reference

Figure.1: Gap_Analysis categories (Example:)

SEQUENCE	CODE	NAME
3	PRD	Products and Materials
5	HR	HR
6	HR	HR/Payroll
7	HR	HR/Employee
9	HR	HR/Attendance
10	FIN	Finance and Administration

3. Process

0. Setup workload type, effort and functionality category. If you want to use standard functionalities, create functionalities with standard workload.

1. Base on the company requirement fill in the file gap_analysis_import_template.xls including number of hours

2. Use OpenERP to generate gap analysis, which can be down by manually or import gap_analysis_import_template.xls file.

2.1 Go to OpenERP system, click GAP Analysis, then create a new gap analysis, define the name and all other necessary information.

Inside the gap, create functionalities based on the standard functionalities

OR

2.2. Import the Gap_template to the system (name will be created automatically) with the functionality “Import Gap from Excel”.

2.3 Setup your gap analysis (price, staff etc.)

4. Finally click “Report – Gap Analysis” or “Action Full Gap Analysis” on left hand to generate gap analysis document.

5. Generate the codes for functionalities and calculate the final price

6. Generate the project and tasks from the gap.

Nota:

- Project and phases are created automatically out of the names in the gap.
- One task will be generated per resource with corresponding time and one additional parent task to gather the sub tasks.

4. Undocumented/Untested/Unfinished Functionalities:

Tasks Templating process: Functionalities can be proposed for template.

Gap analysis templating: allows to create templates to copy from.

Import functionalities: allows to import a set of functionalities at once that can be reused in Gap (undocumented).

TODO: make the workload type even more generic for Excel export.

TODO: reimport a gap should update the current one (currently the original one must be deleted and imported again)

TODO: Make sure that it is not possible to create a project from a gap when it has already been generated.