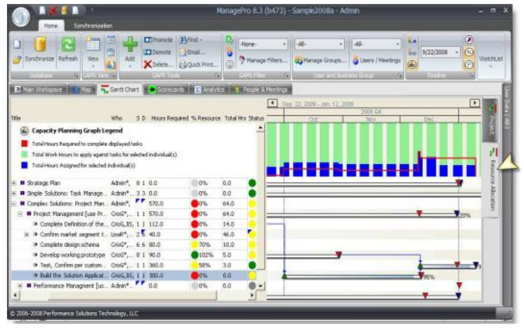
# Project Management within ManagePro

This document describes how to do the following common project management functions with ManagePro: set-up projects, define scope/requirements, assign resources, allocate the time these resources will spend completing the project or task, how to link project dependencies, how to review resource allocation and capacity, and how to apply actual hours using timecards.



## How to set-up a Project in ManagePro

Project management, in its basics, is comprised of 4 steps in ManagePro:

1. Building a project plan by adding records and positioning them to represent the work break down structure or list of projects.

2. Adding/editing fields that provide relevant data to the project, e.g. title, requirement specification (scope statement), start and due dates, personnel assigned, hours required, budget, etc.

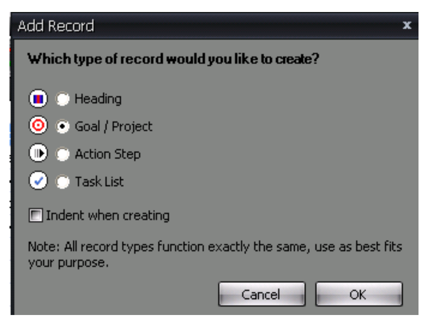
3. Resource allocation as needed, utilizing the assignment of people to each task by hours or by % of their time over the duration of the task. Additional tools include the Resource Allocation Timeline view and People and Meetings view.

4. Progress updates documenting the summary of progress to date, outstanding issues and % complete, as well as tracking of outstanding action items as to-dos within ManagePro.

### 1. Building a Project Plan

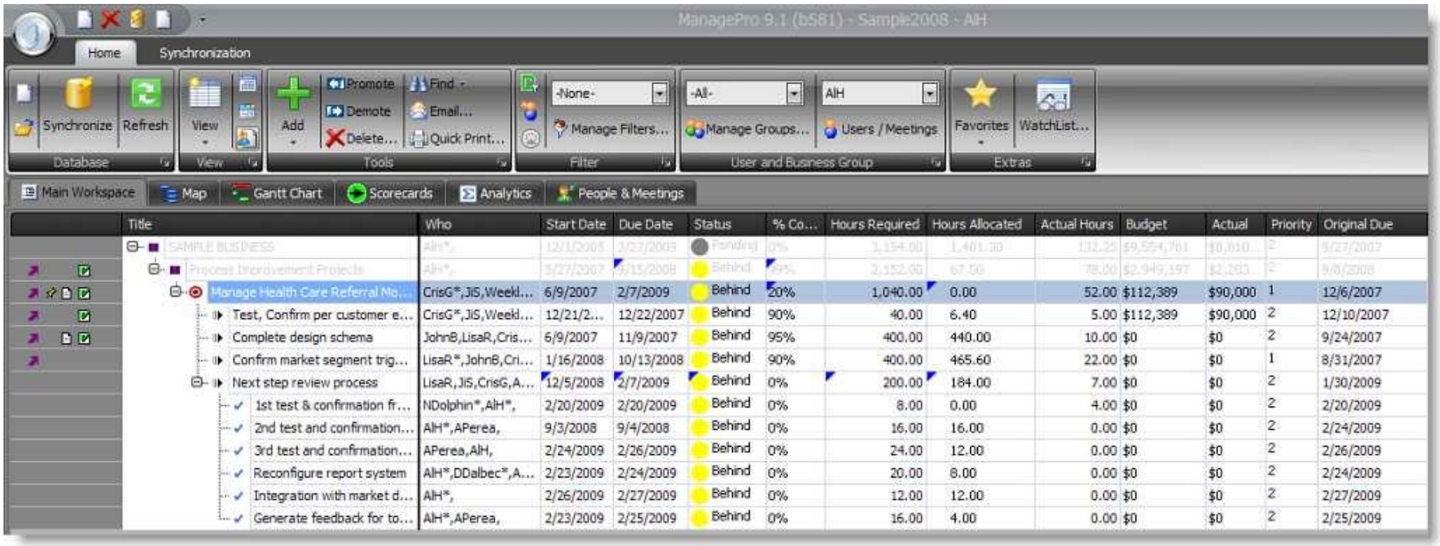
Use the ribbon control or right click menu Add button to add new records. Use the demote or promote buttons to position records in place, or drag records to a new position within a hierarchy by pointing at the icon, holding your left mouse button down and dragging to a new location (providing the record does not display or yellow or red lock, indicating movement is not allowed).

Four types of records are available when adding a new record, e.g. Header, Goal/Project, Action Plan, or Task. Each record regardless of "type" functions the same. The icons simply differentiate one from the other for display purposes in the tree and to create a clearer depiction of how your projects are organized.



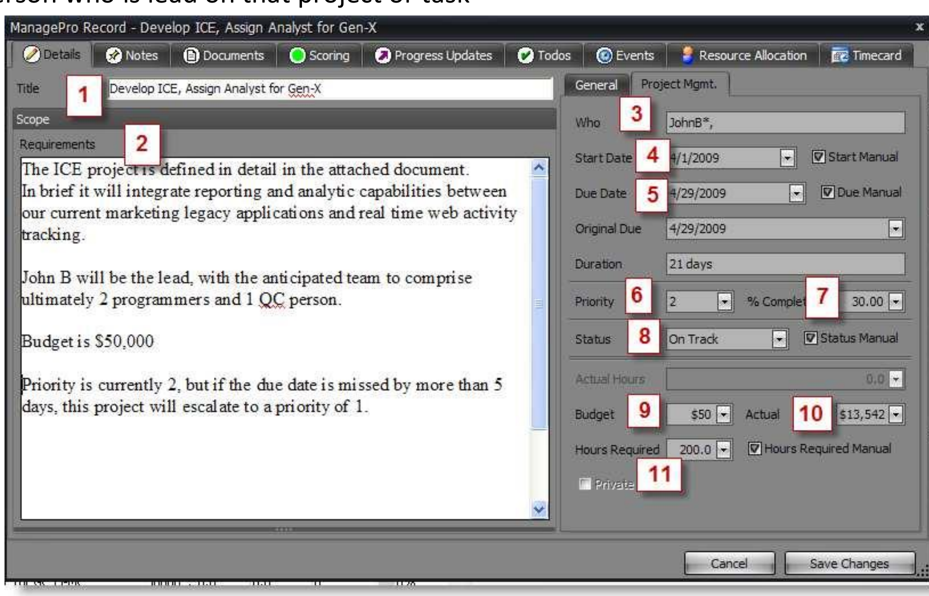
## 2. Editing a Project Plan

Project records can be edited directly from the Main Workspace view. To edit any field displayed, click once and then click on the ellipses or drop down menu on the right side of the field to edit. Or if you double click on any field in the record row, a Details view will be displayed from which you can edit any of the fields directly, providing you have permissions above "read-only" rights.




Using the Details view to enter the What, When, and Who for your project:

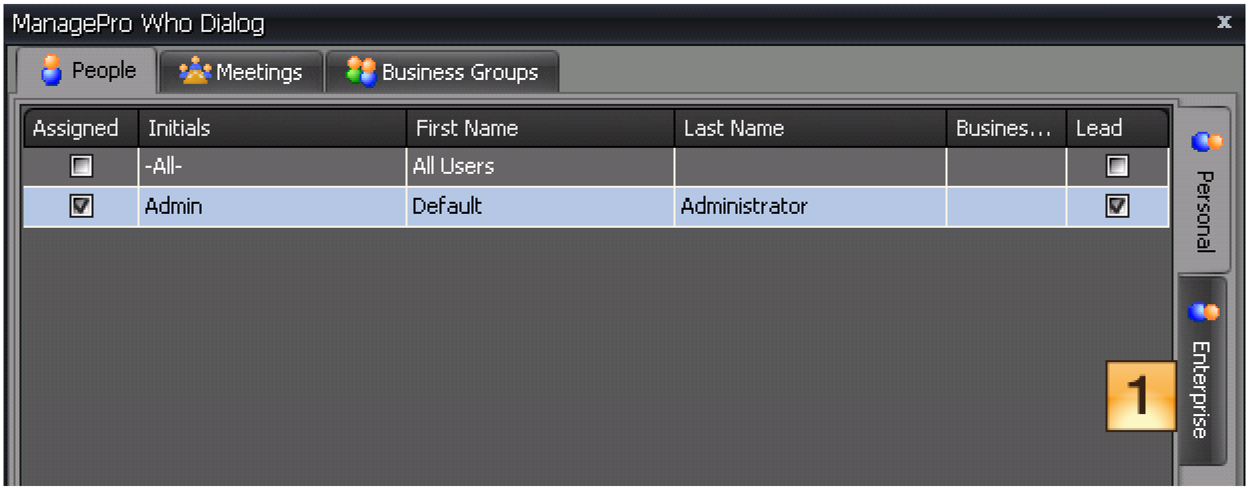
1) Enter Tile – name of project or task
2) Define the project scope – project or task requirements, what the purpose of the project?
3) Assign resources to the Who Field and identify a Lead person responsible
4) Enter Start Date - starting point, when will it start (not required except for resource allocation)
5) Enter Due Date – when will the project be completed (not required except for resource allocation)
6) Priority – Typically set by the person who is lead on that project or task



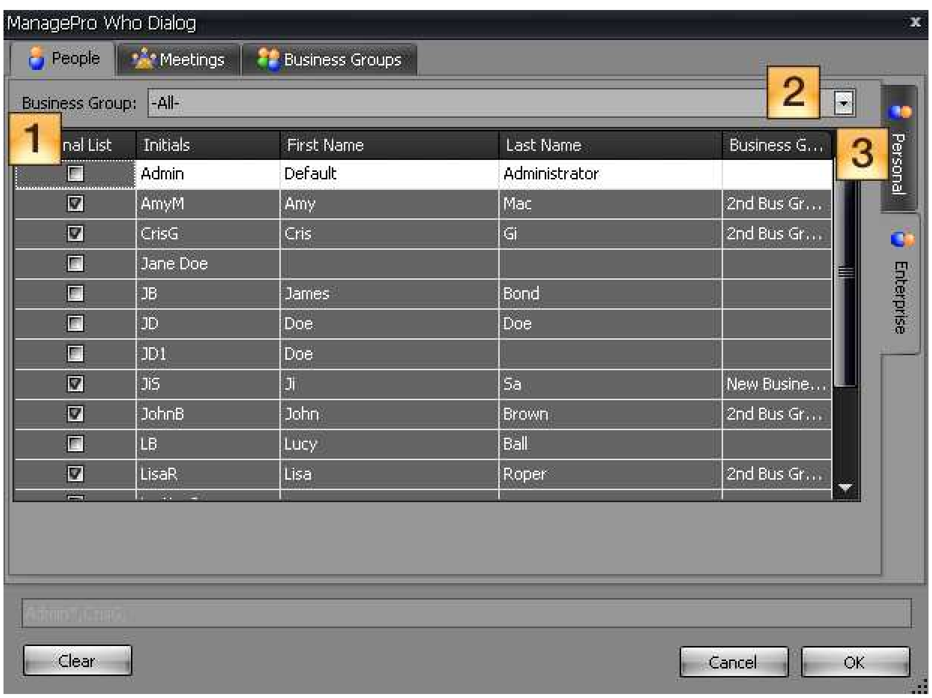

7) % Complete – Typically entered in a regular progress update, the Details view displays the most recent % complete entered in
8) Status – Is the project started, on-track, behind etc.
9) Budget – Allocated
10) Actual – Dollars spent to date
11) Hours Required – Estimate of the # of hours required to complete the task or project this record represents (can either be rolled up from "child" records, or manually set using the Hours Required Manual checkbox.

Side Note: Tips for Entering People, Meetings and Business Groups in the Who Field

Double-click the who field, then click in the checkbox in front of the person's name or if you do not see the person you want to assign, click the Enterprise Tab [1] to add more individuals to your Personal tab view, as it is the only tab view from which you can assign people to the task.




Once in the enterprise (list of all users in the database), select the people [1] you want assigned to the project or task or, if you want to view or sort members of a particular business group, select #2, the business group dropdown




Once selections are made, click the Personal Tab to return and check the names of those individuals you wish to assign to the task… do not click OK on the screen above, it does not assign the people to the project or task.

Back on the personal tab

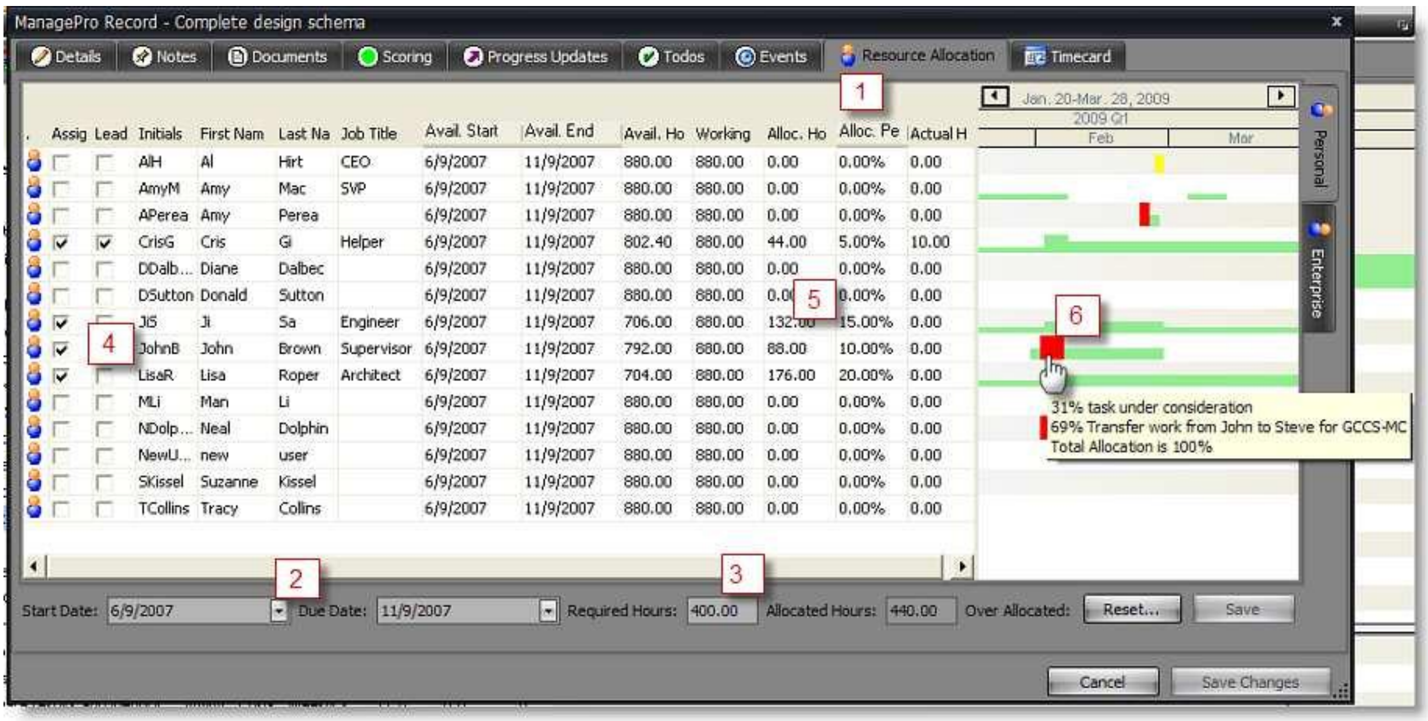
1. Click the people you selected on the Enterprise Tab and click OK
2. Click the Lead check box next to the person who has lead responsibility for completing the project or task. Note: You may have multiples leads. Assigning a Lead means that you can filter by lead person and see only those projects where they have lead responsibility
3. Click Business Groups if you would like to assign a Business Group in addition to individuals. Assigning a Business Group means the people who are members of that business group will have visibility to the project or task.


4) Once Assignment selections are made, Click OK on the Personal Tab. Doing so populates the Who field with your selection.

Step 3: Resource Allocation – how to allocate resources assigned to your project

On the Management Workspace Tab, Double-click the project or task you want to allocate resources, then:

1) Click the Resource Allocation Tab
   NOTE: If you followed the steps above, skip steps 3, 4, and 5 below, otherwise complete them now
2) Specify or verify a start and due date for that project record (generating a duration value)
3) Specify the number of "Hours Required" to complete that task.
4) Specify or verify the individuals to be assigned and allocated to completing that task
5) For each allocated person enter the number of hours they will be allocated to that task or the % of the schedule that will be allocated to that task over the duration of the task
6) Confirm availability by referencing the resource allocation graph on the right. Hover your mouse over any graphic to display the specific tasks and the total allocation for each person over any time period.




Field Definitions

AvailableStart – This date defaults to the start date of the task. If the person is only available at a later date, enter that here.

AvailableEnd - This date defaults to the due date of the task. If the person is only available up to an earlier date, enter that here.

AvailableHours – The total number of hours the person is available during the duration of this task, given their other assignments. If the person is over allocated (allocated more than 100% of their time) this number will be negative.

WorkingHours – The total number of hours this person is working during the duration of this task – e.g. this will be impacted by part time status, personal time-off, etc, all of which we will review later, but is setup in the Work Calendar

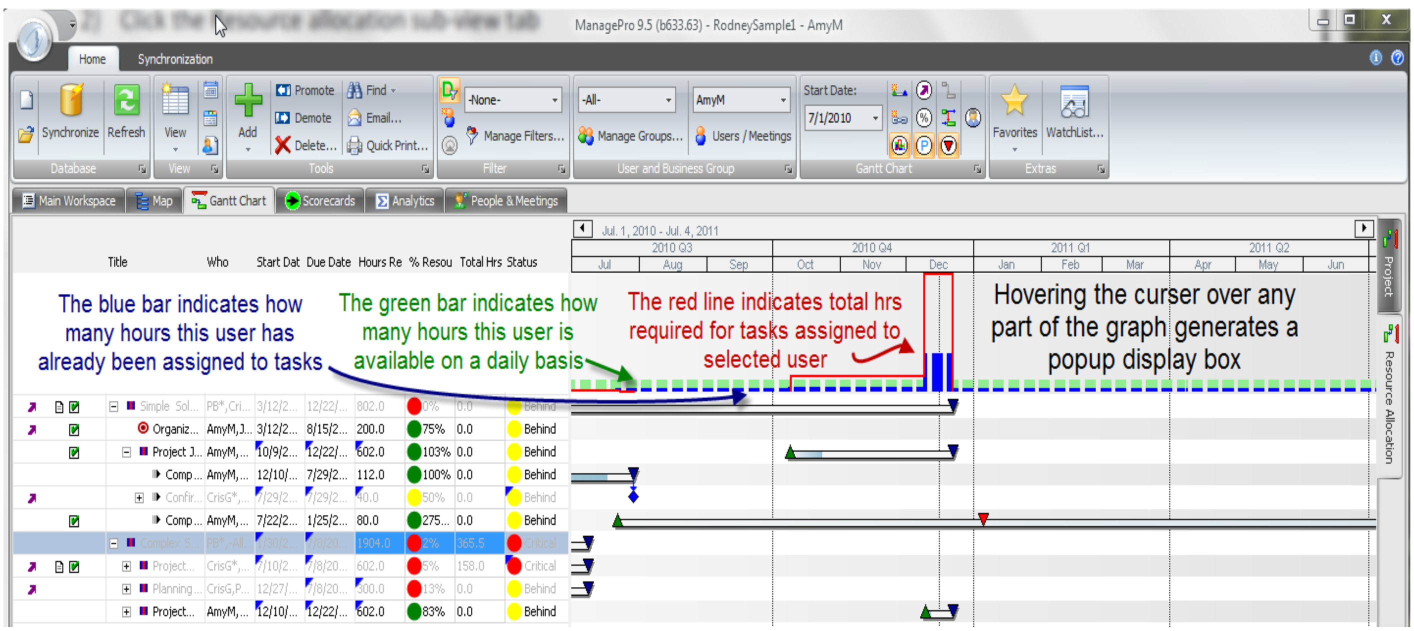
AllocatedHours – Enter the specific number of hours you wish to allocate from this person to working on this task (or you can enter using the Allocated % field)

Allocated% – Enter the specific % of this person's time over the duration of the task you wish to allocate to this task (or you can enter using the Allocated Hours field)
TheGanttchart on the right displays each person's current level of allocation to tasks. It is color coded (we'll review how to configure later), and if you hover your mouse over any duration bar, you'll view the tasks this person is allocated to in that time period, % allocated and priority of those tasks. Remember the Gantt chart moves forward and back with the upper corner arrows, plus if you hold your left mouse button down while pointing at the top of the chart, you can zoom in or out of time perspective by moving the cursor to the left or right.
At the bottom exist the task's Start and Duedate fields as well as the RequiredHours field, all of which you can edit from this view.
AllocatedHours – Represents the sum of hours you have allocated against this task in the grid above.
UnderAllocated – This field calculates the difference between the Required Hours and the number of hours you have allocated against this task. If under-allocated, the number displays with a minus and in red font

Once you have completed adding your projects and tasks that support them you can begin to review resource allocation and capacity across one project or task or multiple projects. Let's move to the Gantt chart.

The Gantt Chart – An immediate overview of projects and the resources assigned to them

1) Click the Gantt Chart Tab
2) Click the Resource allocation sub-view tab




Column Definitions:

1. HoursRequired – This column displays the number of hours required to complete the task that you have entered from the details view. This is a rollup column, so the numbers sum up or are totaled at the parent goal level.
2. %Resourced – This column calculates the % Resourced by dividing the hours allocated (entered in the previously discussed Resource Allocation tab form) by the hours required to complete the task, and it adds a color globe for extra visibility.
3. TotalHours – This column sums the total hours that have been entered against this task via the ManagePro time cards (available under the Details/Time Card tab).

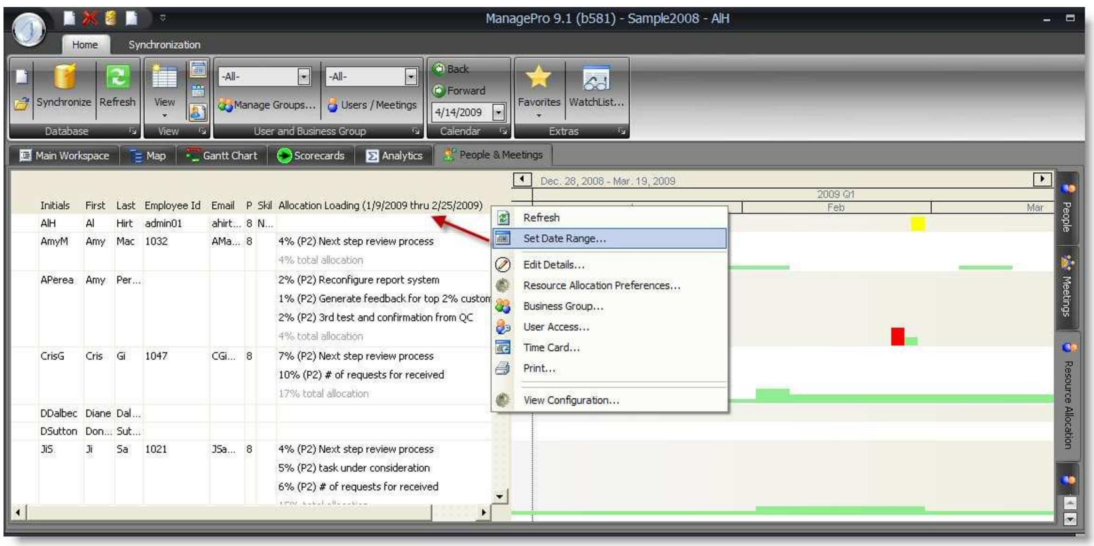
Let's turn our attention to the Capacity Planning Graph over the t op of the Gantt chart area.

4. RedLine – The red line represents the total number of hours required to complete the tasks displayed below on each given day. Note that the line continues through weekends, even though no required hours may be scheduled for that time, to aid visual continuity.
5. GreenBar – represents the total working time available for user(s) selected
6. BlueBar – represents the total number of staff hours allocated.

Note the Timeline view also has a full compliment of project planning tools, to be covered later in the document.

People and Meetings Resource View

Finally the Resource Allocation tab view in the People & Meetings area, allows you to view across your direct reports and determine relative allocation and availability using the Allocation Loading column. Right click and choose the Set Date Range to determine the date range for calculations.




The Resource Allocation sub-view within the People/Meetings tab provides an over-view or the allocation loading for each individual (or your entire group) across a defined time range. The allocation loading is presented both graphically on the bar chart on the right, as well as by text in the "Allocation Loading" column. Let's review in detail.

1) The graphical timeline region can be expanded or contracted in span by using the left mouse click cursor movement, when the cursor is at the top of the screen. You can also move the graph forward or backward in time using the arrows on the timeline's upper left and right corners. Hovering your mouse over any section of the bar charts will display what tasks the individual on that row is assigned to, and what % of their time is allocated to the tasks on that date.
2) The "Allocation Loading" column calculates across a date range the total allocation loading for each individual, plus lists each task they are assigned to during the selected period as well as the overall percentage of their time assigned to that task given the duration selected. That sounds more complicated than it is.
3) To use, simply right click in this view and choose "Select Date Range". This automatically configures the timeline graph to display this date range selected, plus identifies each task an individual is assigned to during the date range selected. It then lists each task and its assigned priority for each individual.

Step 4: Progress updates

Updates to any task or project are best accomplished using the progress update area. Progress udpates can be entered manually using the Right click menu option, by dragging in Outlook email, or by converting a todo or event into a progress update using the right click menu option in those records (Save as).

Best practices suggest that progress updates at the minimum contain the following:

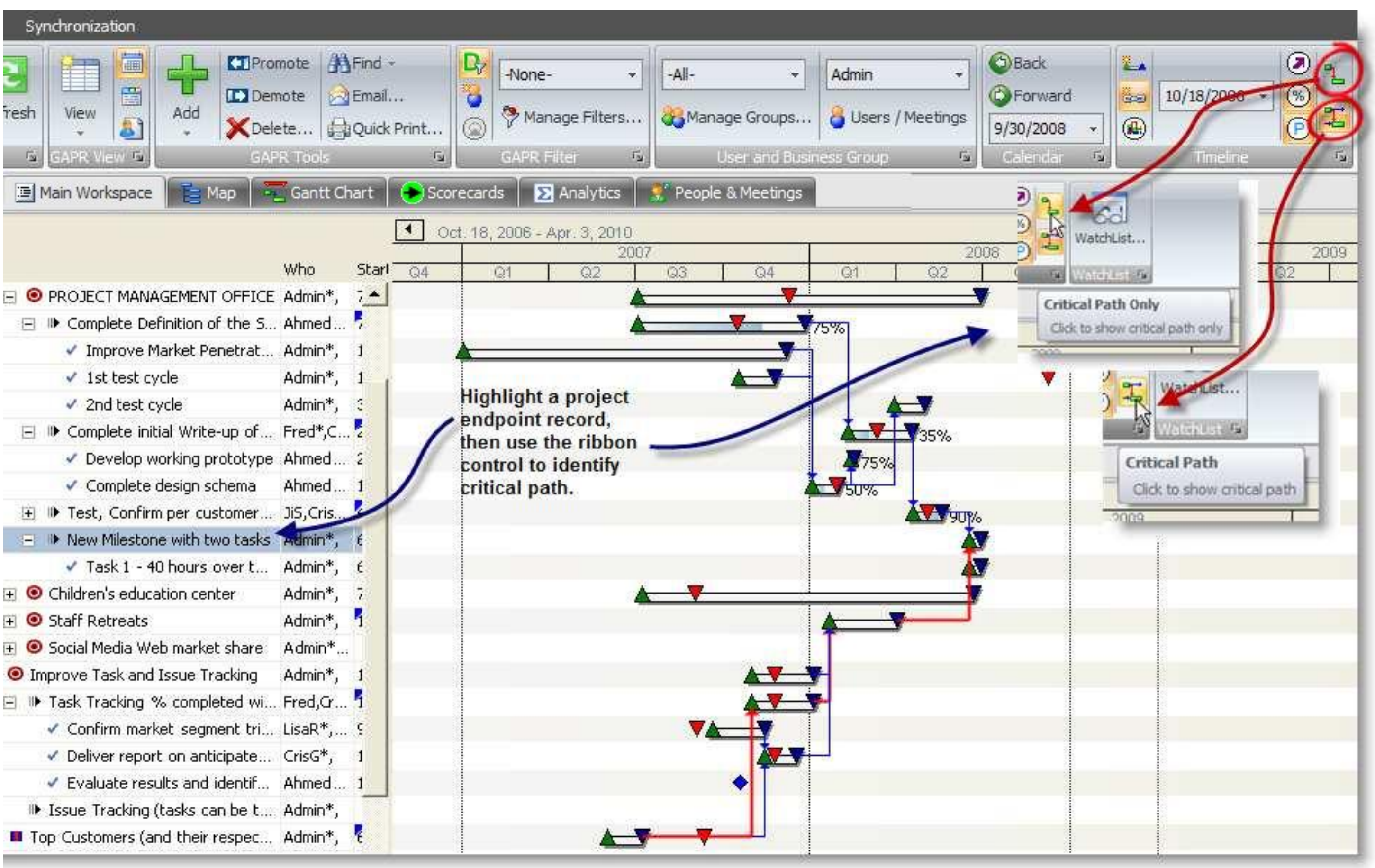
1. A 25-50 word summary of progress and status todate,
2. A statement of any known issues
3. Plans for resolving any raised issues – typically repurposed as either additional todos or tasks within ManagePro.
4. A value for % complete.

## Additional Topics

Linking Dependencies

ManagePro enables you to create a basic dependency link between one goal and another. It links the Due date of the first record (predecessor record) to the start date of the second record (Target). So if the Due date of the first goal moves out past the original Start date of the second goal then the second goal will get pushed out automatically.

Linking goals is done in the Gantt Chart view. When picking 2 goals to link make sure the start date of the Target record is the same or later than the Due date of the predecessor record. You can also leave the fields of both goals blank and as soon as you enter a Due date in the predecessor record then the same date flows down as the start date of the Target record.

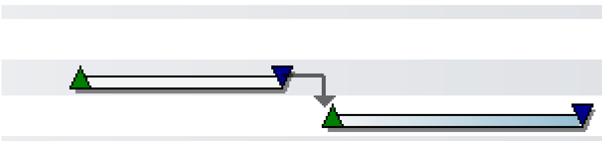


Follow the steps below to link 2 goals together.

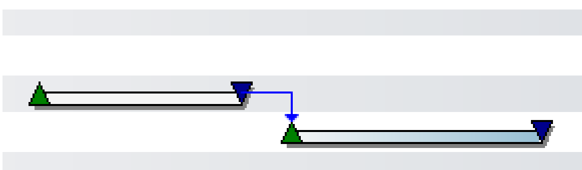
1. Highlight the predecessor record and click the Enter to Creation Link Mode icon on the Timeline Toolbar (small link chain). 

2. In the Gantt View, right-click the timeline due date of the predecessor goal and drag it to the start date of the target goal

3. A black arrow will be displayed while you are making the link between the two goals



4. When you release your mouse the two goals are linked with a blue arrow as shown below



To remove a dependency or link between two goals, follow the steps below:

1. Right-click on the blue arrow that joins the two goals

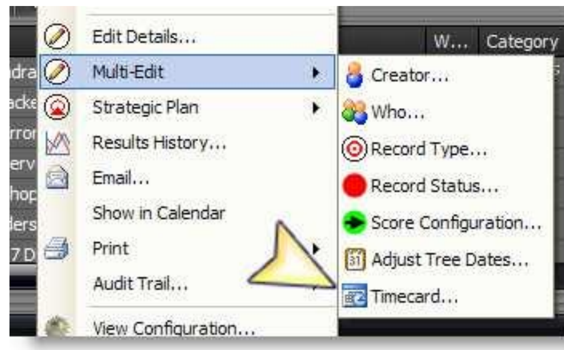
2. Select Delete Link from the right-click menu options

Time Card entries: How to post actual hours against projects and/or tasks

The Timecard tracks hours allocated entries entered against each goal, action step or task. The Timecard provides statistics of the amount of time such as Hours to-date, Hours this month, and Hours this week that has been expended against the identified line item. Timecard entries are stored in the Goal Details View and People and Meetings view .

**Time cards can be entered in one of three ways**

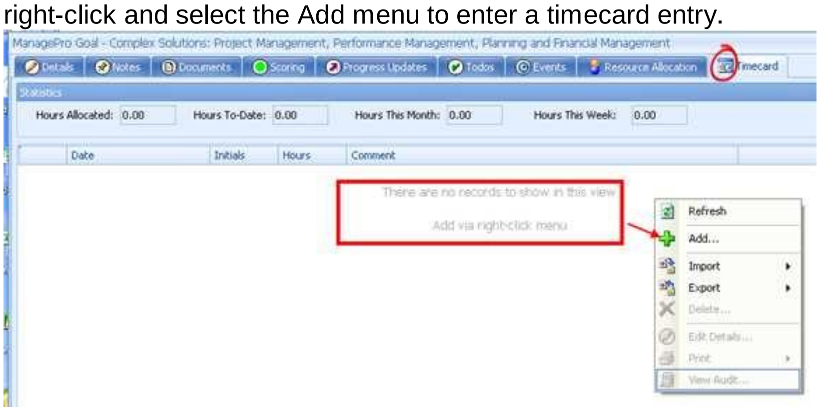
1. Use the right click option of Multi Edit/Time cards. From here you have the option enter time card entries against any or all of the current projects records assigned to you, or just those you have highlighted with control left mouse click, prior to choosing this option.



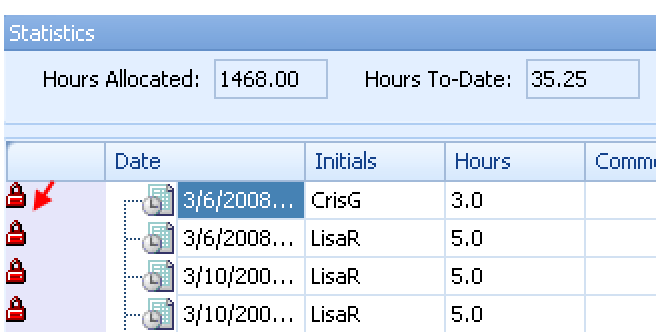

2. You can select any record and then from the ribbon control select Add/Time Card.

3. From within the details of any record you can click on the Timecard tab and then proceed to add a timecard entry.

Note: If there are no previous time card entries, the display of timecard entries will be blank, as seen below. In this case, right-click and select the Add menu to enter a timecard entry.




- If previous records exist, you may see the entries with "red-locks" which means you can only view the entry and cannot make changes but can add new entries.



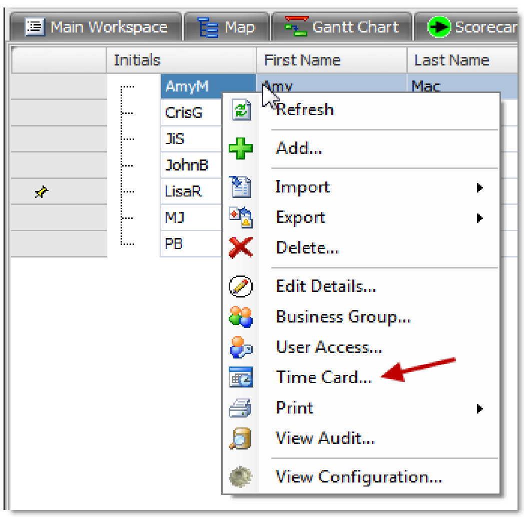
**To view an existing timecard entry, double click the record.**

- To Add a new record, right-click and select the Add menu options as shown above
- Enter comments in the free form text field
- The date and time can be changed by accessing the calendar date picker
- You can make the time entry for yourself (the logged in user), or click the Who drop down to access a list of Users
- Enter the hours
- Save your changes

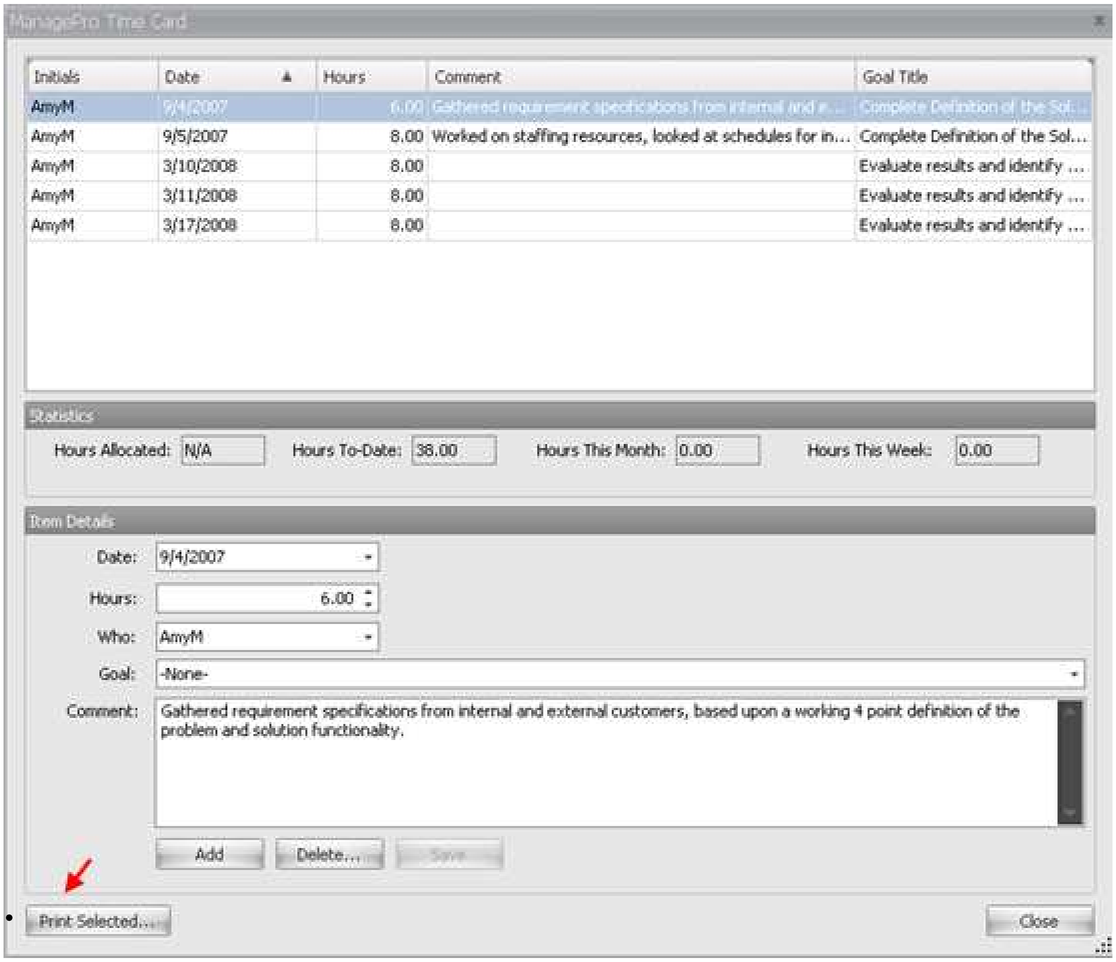
**Working with Timecard Entries in the People and Meetings View**

- Navigate to the People and Meeting View


- High-light a name and Right-click and select Timecard




- The display below illustrates hours for AmyM, you can modify existing hours, or add new hours
- Additionally, you can **print the timecard** by printing a selected record or a range of records by using the Shift or CTRL keyboard commands.




When in the Print Preview, you can print, save, email or print the output to various formats.