Project Planner version 2.5 User's Manual

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1. Introduction

Project Planner is an application to manage projects and tasks.

Project Planner lets you manage multiple projects simultaneously. In each project you can create multiple tasks grouped into phases and ended with milestones.

The project can be viewed as a Gantt chart, vertically and horizontally, across days, weeks and months.

Main functions:

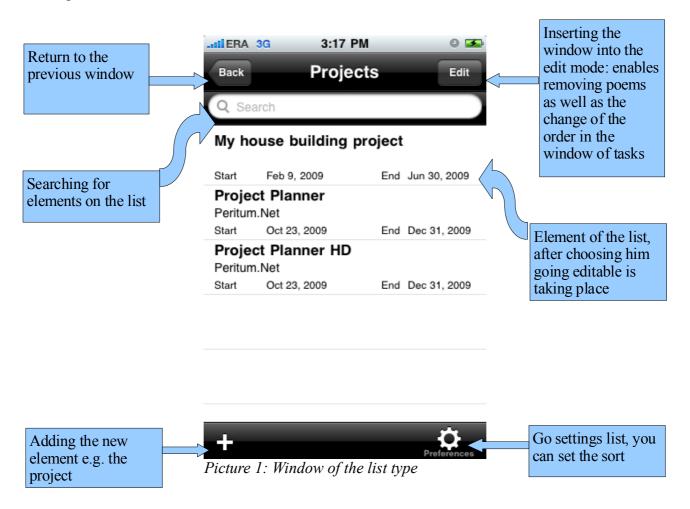
- managing multiple tasks
- viewing tasks in a list and Gantt chart
- simultaneous viewing of many projects in the Gantt chart
- editing tasks directly from the Gantt chart
- editing available in vertical and horizontal mode
- editing tasks to control the progress of implementation
- creating dependencies between tasks
- data export in .gan format (supported by the Project Gantt software available on OSX, Windows and Linux)
- export the report in PDF format
- export of Gantt chart as an image in PNG format
- exporting available through the mail and Wi-Fi network (Bonjour)
- Importing projects in the . gan format (with some limitations: Project Planner does not import resources and all the dependencies are imported as 'hard' links with 'end-to-start' type)
- projects copying
- defining their own calendars for projects
- sorting tasks by name, start and end dates, and field order
- sorting projects by name and the dates of beginning and end
- easy searching of tasks and projects
- PIN for security of applications

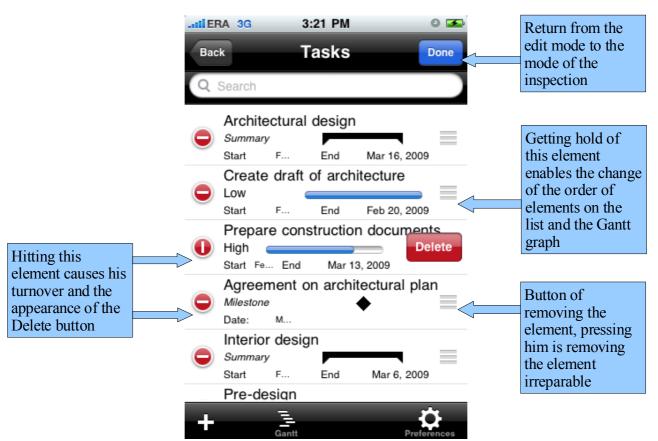
2. The standard user interface elements

Chapter discusses the standard, found in most of the windows, user interface elements.

2.1. Window of the list type

Window of the list type is an essential way of showing the bulk of elements, so as projects, tasks or relations. Passing the editable chosen element is taking place after single hitting in it with the finger.





Picture 2: List in the edit mode

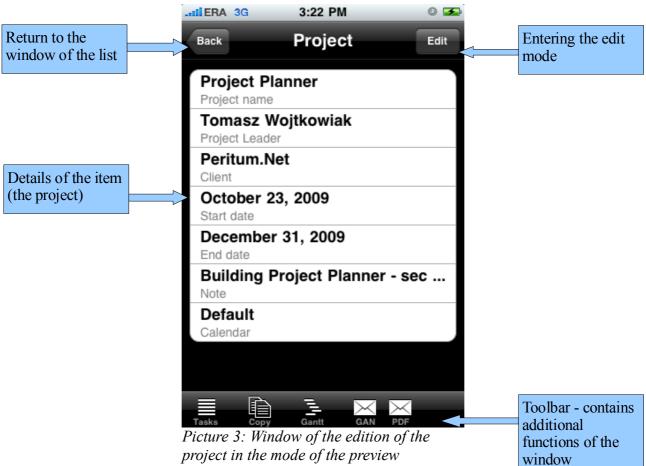
2.2. Window of the edition of the element (project / task)

The window of the edition works under two procedures:

- mode of the preview
- edit mode

2.2.1. Mode of the preview

In the preview mode it is not possible to change the contents of each field. To edit the form, press the 'Edit' button.



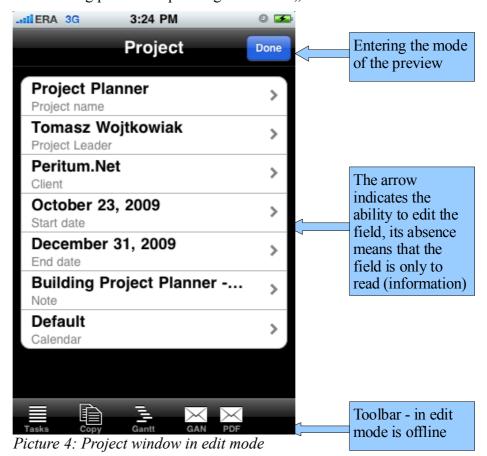
In this mode, there are additional options on the bottom bar (toolbar) that anow the induction of additional features available in your window.

2.2.2. Edit mode

In the edit mode, in fields, of which content it is possible to edit, an arrow appears, pointing out to the possibility of passing the content editable appears.

In Edit mode, the action of buttons on the bottom bar (toolbar) is blocked and you can not use the options available in it.

Return to modes of the preview is taking place after pressing the button "Done".

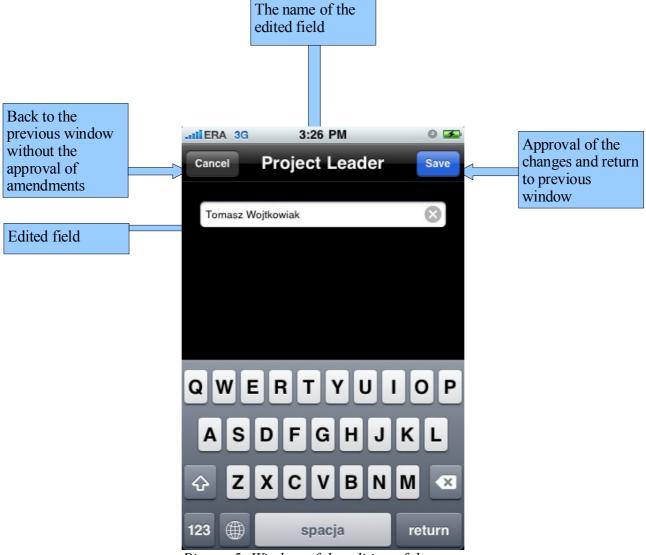


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2.3. Window of the edition of the text box

Window of the edition of the text box is used to edit fields in which information is presented as a line of characters, such as customer name. Later in the manual, in the description of fields, the name text box is used, which means that its content is edited using such window. In this window, for editing the field, alphanumeric keyboard is available.

In the window are two buttons - Cancel, closing window and returning to the previous one, without saving changes and Save, closing window and returning to the previous with saving the changes.

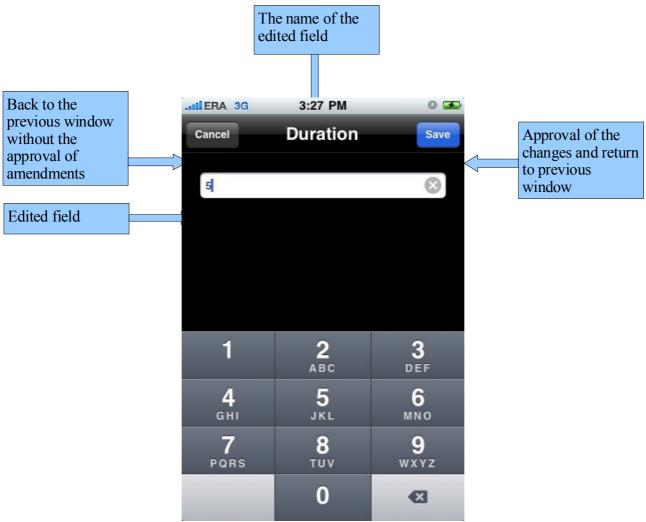


Picture 5: Window of the edition of the text box

2.4. Window of the edition of the number field

Window of the edition of the number field is used to edit all the numbers available for editing in the program. The window contains a field with the edited value and numeric keypad.

In the window are two buttons - Cancel, closing window and returning to the previous one, without saving changes and Save, closing window and returning to the previous with saving the changes.



Picture 6: Window of the edition of the number field

2.5. Window of the edition of the data field

Window of the edition of the data field lets you choose the date from the calendar containing the dates of view of the whole month. In addition to the calendar, marked with dark gray background are holidays (according to the calendar applicable at the editing project).

In the window are two buttons - Cancel, closing window and returning to the previous one, without saving changes and Save, closing window and returning to the previous with saving the changes.



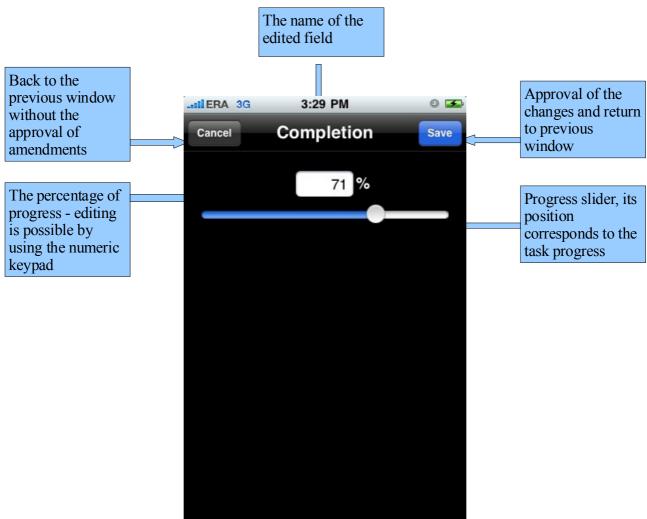
Picture 7: Window of the edition of the data field

2.6. Window of the edition of the field in progress type

Edit the task progress is possible in two ways:

- by giving progress in figures to the percentage value
- by moving the slider of progress of the task

In the window are two buttons - Cancel, closing window and returning to the previous one, without saving changes and Save closing the window and returning to the previous with saving the changes.

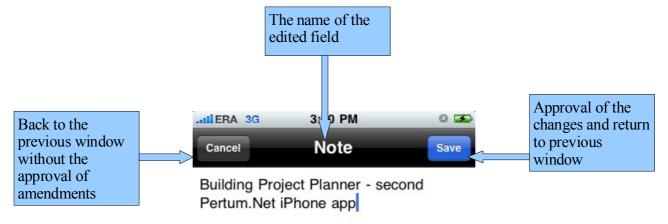


Picture 8: Window of the edition of the field in progress type

2.7. Window of the edition of the notebook type field

Window of the edition of the notebook type field contains large text box, allowing you to enter a long, multi-line (unlimited length) note.

In the window are two buttons - Cancel, closing window and returning to the previous one, without saving changes and Save the closing window and returning to the previous with saving the changes.



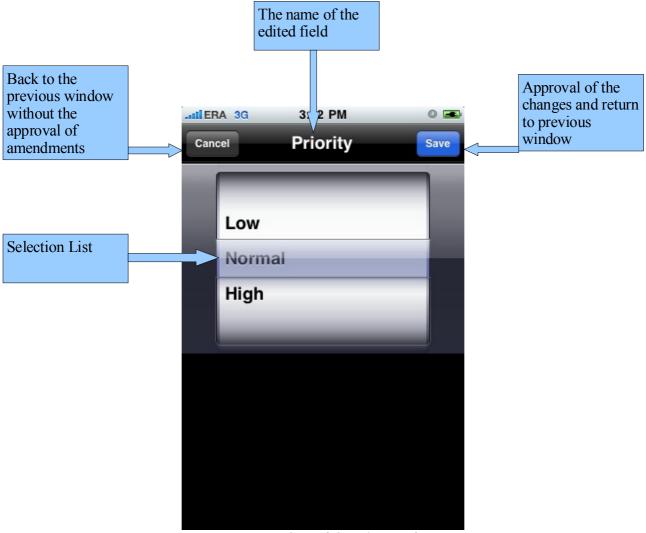


Picture 9: Window of the edition of the notebook type field

2.8. Window of the edition of calculation field

Window of the edition of calculation field allows you to select field values from a specified list. These fields are used for both, selection of enumeration types and tasks when connecting them together.

In the window are two buttons - Cancel, closing window and returning to the previous one, without saving changes and Save the closing window and returning to the previous with saving the changes.

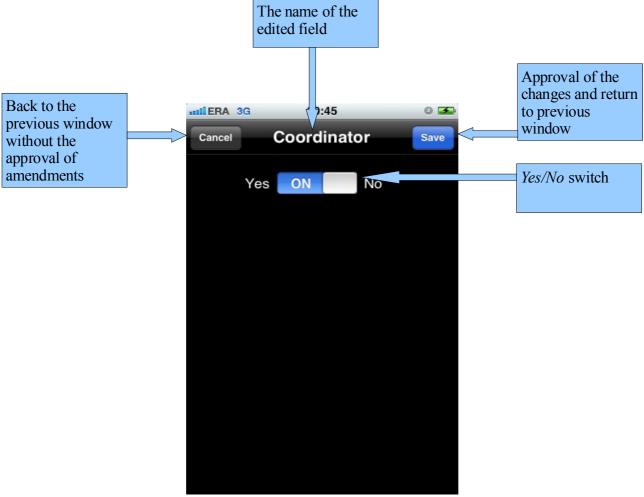


Picture 10: Window of the edition of calculation field

2.9. Window of the edition of logical field (BOOL field)

Window of the edition of BOOL field allows you to set value for logical field *Yes/No (On/Off)*.

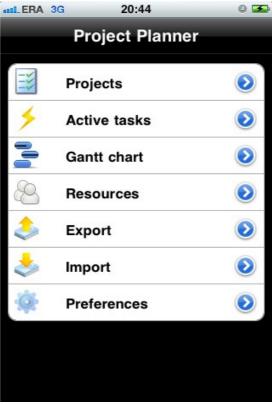
In the window are two buttons - *Cancel*, closing window and returning to the previous one, without saving changes and *Save* the closing window and returning to the previous with saving the changes.



Picture 11: Window of the edition of logical field

3. After starting

After starting the application (if PIN control is not included) the main application window shows (picture 11).



Picture 12: Main application window

Available options are:

- Projects allows you to manage projects <u>chapter 4</u>.
- Active tasks displays the list of active tasks <u>chapter 8</u>.
- Gantt chart allows displaying the Gantt chart for selected projects <u>chapter 9</u>.
- Resources allows you to manage resources available in projects <u>chapter 10</u>.
- Export allows you to export the selected projects <u>chapter 11</u>.
- Import allows you to load projects to applications from your PC / Mac <u>chapter 12</u>.
- Preferences allows you to manage application parameters <u>chapter 13</u>.

4. Projects

4.1. Project list

When you select *Projects* from the main application menu, you will go to the project management screen (picture 13).

For each project listed, shows its:

- name
- client
- start and end dates



Picture 13: Project management

After pressing the button "+" we can add the new project, choosing the existing project causes undergoing this project editable.

On the list of projects searching after writing the text down in the front for searching is possible. The application is searching this text in fields: *Name, Manager, Client* and *Notebook*.

4.2. Sorting the list of projects

It is possible to sort the list of projects according to the following fields:

- project name
- start date
- end date

For every field it is possible to adjust the mode of sorting: ascending and descendingg.

After the approval, settings of sorting are remembered and used until the next change with the help of this window.



Picture 14: Window of sorting the list of projects

4.3. Edition of the project

For every project it is possible to determine:

- name of the project, text box
- manager of project, text box
- customer's name, text box
- starting date of the project, data field
- project end date, data field
- notes concerning the project, notebook type field
- Calendar: a new project initially uses the default calendar of application (in the box the
 information 'Default' is displayed), but you can create a separate calendar for the selected
 project. Calendar is created as a copy of the default project. After its creation in the box
 information 'Own' is displayed



Picture 15: Window of details and the edition of the project

Available buttons on the toolbar allows you:

- button "Tasks" passage to the list of tasks
- button "Copy" is creating the copy of the current project
- Gantt is showing the Gantt chart for the current plan

- GAN create an email containing the exported project in the .gan format (read out by the program Gantt Project available on platforms of the X Wasps, Windows and the Linux)
- PDF create an email containing a draft report in PDF format

5. Tasks

5.1. Task list

On the list of tasks all tasks attributed for the given project are being presented. For every task the following information is being shown:

- task name
- type of task presented as a picture:
 - summary
 - task
 - milestone
- initial date of the task

For normal tasks and summaries also a date of the end is being shown, so the milestone doesn't have the duration, so there is no also date of the end.

For normal tasks also a priority is being presented (low, normal, high) and progress of the task.



Picture 16: Task list

Button ,, + " is used for giving the new objective. After squeezing it a question about the type of the new objective is appearing, to choose from:

summary

- task
- milestone



Picture 17: Adding the new objective

5.2. Sorting the list of tasks

It is possible to sort the list of tasks according to the following fields:

- order field appointing the order on the list as well as on the Gantt chart. Change of the order is possible to make by rescheduling tasks on the list of tasks
- task name
- date of the beginning of the task

For every field it is possible to adjust the mode of sorting: ascending and descending.

After approving, sorting settings are remembered and used until the next change with the help of this window.

Attention: on the list of tasks a change of the order of tasks option is available. Its using is possible only with setting sorting over field Order with the option of ascending sorting.



Picture 18: Window of sorting the list of tasks

5.3. Edition of the task

Because of the fact that different types of tasks have different lists of fields, they are discussed each of them individually.

5.3.1. Normal tasks

The task constitutes the basic component in the process of managing a project.

For each task you can specify:

- task name, text box
- starting date of the task, data field
- duration of the task determined on days, number field
- priority of the task, calculated field with values: low, normal, high
- progress of the task, progress type of field
- dependent tasks chapter 6
- allocations chapter 7
- notes concerning the task, field of the type notebook



Picture 19: Window of the edition of the task

Additionally, on the window, are being shown in information purposes

 date of termination, estimated according to the start date and the duration based on the current calendar.

5.3.2. Summary

Suming up in the Gantt notation constitutes reflecting the stage in the project. They are being put above storage tasks and usually finishing with milestone.

For each summary, you can specify:

- name of summary, text box
- start date of summary, data field
- cduration of the task determined on days, number field
- dependent tasks chapter 6
- allocations chapter 7
- notes concerning the summary, field of the type notebook



Picture 20: Window of the edition of the summary

Additionally, on the window, are being shown in information purposes

 end date, estimated according to the start date and the duration based on the current calendar.

5.3.3. Milestone

The milestone in the Gantt notation is a final point which is suming up the determined worksheet, or the given stage of the project. It is indicating the certain essential, disposable event which is possible to define in explicit way [definition behind wikipedia.pl].

For each summary, you can specify:

- name of the milestone, text box
- date of the riot of the stone, data field
- dependent tasks chapter 6
- allocations chapter 7
- notes concerning the summary, field of the type notebook



Picture 21: Window of the edition of the task in milestone type

6. Dependencies

Dependencies in the application are symbolizing connections between tasks, arranging them in the logical sequence of tasks. They enable also an identification of critical paths. It is possible to combine every task with the any number of other tasks.

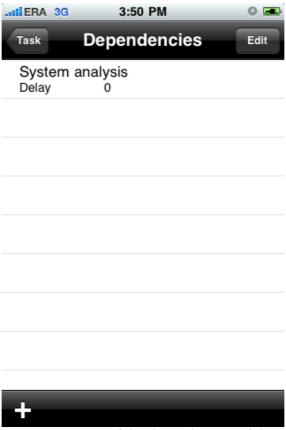
Connecting the task with other task means that the beginning of this task will be automatically listed based on the end of tasks link (a maximum date is being chosen) enlarged for delaying of the task.

Attention: Project Planner handles only end-to-start link, so tying the end of one task with the beginning of the next task.

6.1. List of the dependencies

The list presents all the dependencies attached to the task. For every dependency are presented:

- Name of the connected task
- Delaying the beginning of the task tied together in relation to the end of the task, in the context of which we are working



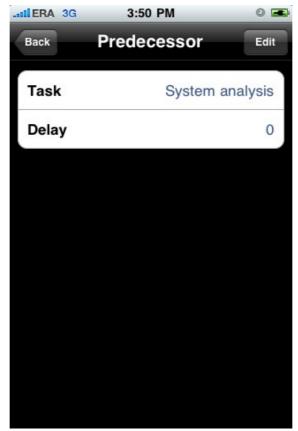
Picture 22: List of the dependencies of the task

6.2. Edition of the dependencies

The window of the edition of dependencies allows to add the new dependency to the current task.

For each dependency must be determined:

- related task, choice from the list
- delay of start date of the task, a numeric field



Picture 23: Edition of the dependencies

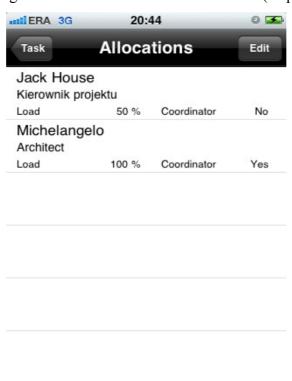
7. Allocations

Allocations in the application are symbolizing assignation of recource to task. Each task can allocate multiple resources, to each of the resources, you can specify different load, to each task you can also specify one or many responsibles (called coordinator).

7.1. List of the allocations

The list presents all the allocations attached to the task. For every allocation are presented:

- Name of the connected resource
- Resource role
- Load
- Yes/No flag, indicating if the resource is the task coordinator (responsible person)



Picture 24: List of the allocations

7.2. Editing of the allocation

The window of the edition of allocation allows to add the new allocation to the current task.

For each allocation must be determined:

- resource, choice from the list
- role, choice from the list
- load, progress field
- Yes/No flag, indicating if the resource is the task coordinator (responsible person) BOOL field



Picture 25: Edition of the allocation

Available resources are created in Resources window – chapter 10 Available roles are created in Roles window – chapter 13.7

8. Active tasks

8.1. List of active tasks

List of active tasks shows all tasks, all projects, that have not yet been completed and their start date passed, or is passing at the opening of the list.

Highlighted in red are the tasks which completion date has expired and they are not finished.

Directly from the list of active tasks you can go to edition of the selected task (like from the list of tasks).



Picture 26: List of active tasks

8.2. Sorting the list of active tasks

It is possible to sort the list of active tasks according to the following fields:

- order field appointing the order on the list as well as on the Gantt chart. Change of the order is possible to make by rescheduling tasks on the list of tasks
- task name
- start date

For every field it is possible to adjust the mode of sorting: escending and descending.

After the approval, settings of sorting are remembered and used until the next change with the help of this window.



Picture 27: Sorting the list of active tasks

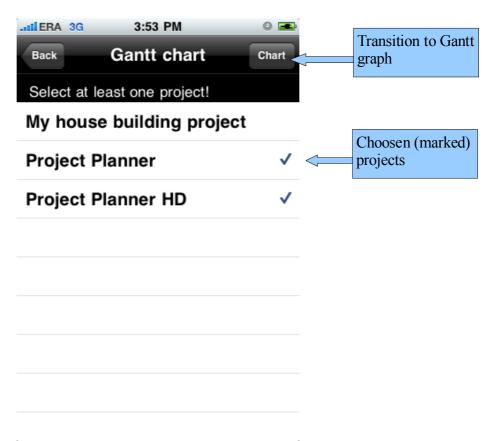
9. Gantt chart

A Gantt chart is a graph applied mainly in the project management. In it a division of the project into individual tasks is included, and laying them out in the time are being taken into account. It is, at present, standard way of presenting dividing tasks in the project.

9.1. List of projects for showing on the chart

On the list of projects all plans which we can show on the chart are being presented. The list enables choosing (marking) a few of projects which will be shown on the chart. This allows the compilation of the tasks of different projects on one timeline.

The transition to the Gantt chart is coming after choosing an option *Chart*. The transition to the chart is possible only after emphasizing at least one project.



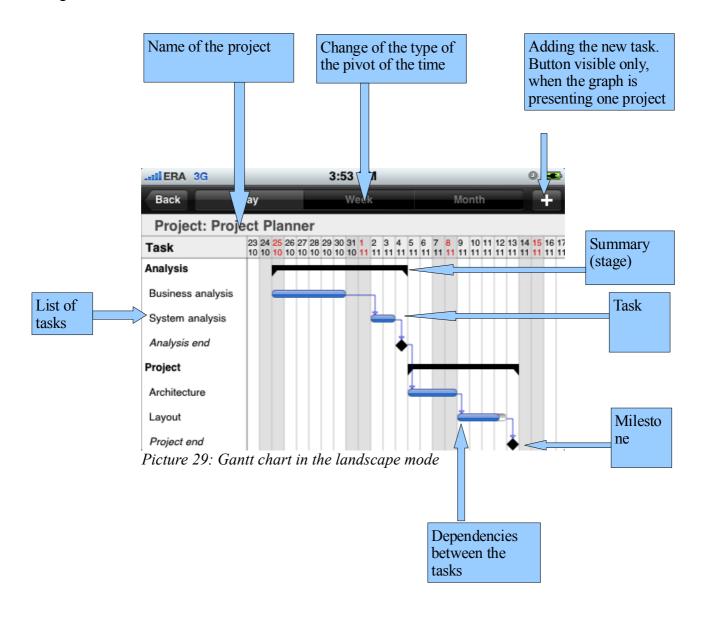
Picture 28: Choice about tasks for showing on the chart

9.2. Chart

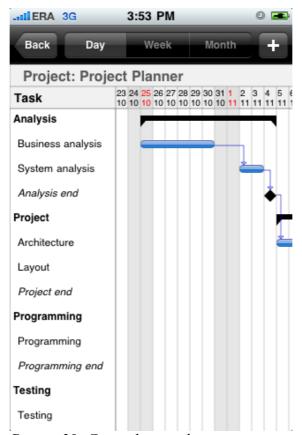
The Gantt chart is presenting the list of tasks from selected projects on the pivot of the time. Watching the graph in the division of the pivot of the time into days, weeks and months is possible.

Directly from the chart adding new tasks and the edition of existing tasks is possible. In order to add the new task you should press the button "+", it is only approachable when the chart is presenting only one project.

The edition of the task is possible after tapping either into the name of the task, or into its picture on the chart. After this operation a standard window of the edition of task of chosen type is opening. After closing the edition of the task, a return to the chart is taking place, and changes in the task are being reflected on the chart.



Chart, as well as the entire application, can work in landscape mode and portrait mode.



Picture 30: Gantt chart in the portrait mode

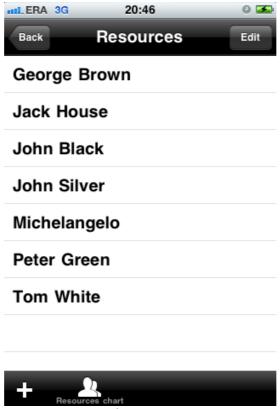
10. Resources

10.1. List of resources

When you select *Resources* from the main application menu, you will go to the resources management window.

For each resource listed, shows its:

- name



Picture 31: List of resources

After pressing the button , + "we can add the new resource, choosing the existing resource causes undergoing this object editable.

After pressing "Resource chart" button you will go to the chart of the resource load (chapter 10.5).

10.2. Editing of the resource

The window of the edition of resource allows to add the new resource to the current task. For each resource must be determined:

- name, text field
- contact, text field
- phone, text field

In addition you can go to edit the list of tasks (allocations) allocated to the resource.



Picture 32: Editing of the resource

10.3. The list of the allocations of the resource

When you select *Tasks* option from the previous window (chapter 10.2), you will go to the list of the allocations of the resources.

For each allocations listed, shows its:

- task name
- project, to which belongs task
- resource load in task
- Yes/No flag, indicating if the resource is the task coordinator (responsible person)



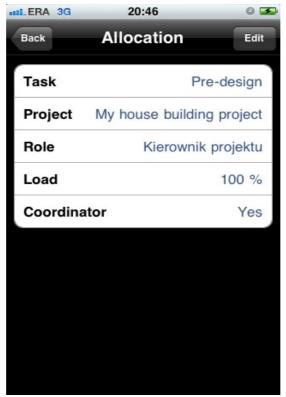
Picture 33: List of the allocations of the resource

Choosing the existing allocation causes undergoing this object editable.

10.4. Editing of the allocation of the resource

To each allocation you can specify:

- role, choice from the list
- load, progress field
- Yes/No flag, indicating if the resource is the task coordinator (responsible person) BOOL field



Picture 34: Window of the edition of the allocations of the resource

10.5. Resource chart

Resource chart is presenting resources load in time. Window contains list of resources definied in the application, and chart of the daily load of the resource. Loads greater than 100% is indicated in red, loads lesser or equal 100% is indicated in green.



Picture 35: Resource chart in the landscape mode

The edition of the resource is possible after tapping into the name of the resource. After tapping in load application shows window of the edition of the allocations of the resource (chapter 10.4).



Picture 36: Resource chart in the portrait mode

11.Export

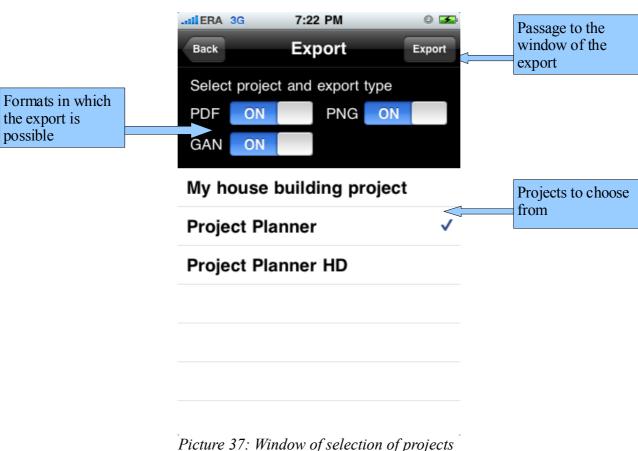
The Project Planner application enables to conduct the export of data in a few chosen formats. They are:

- PDF a report containing the Gantt chart and comparison of tasks in the tabular form is being generated; it is possible to configure this export in preferences of the application,
- GAN data file to the Gantt Project program working on OSX/Mac/Linux operating systems. This program enables the edition of the project on a computer. Sending the project to iPhone is also possible (option Import)
- PNG the program enables to export the Gantt chart in the daily arrangement as the .png picture

11.1. Selection of projects for the export

On the window of the selection of projects all plans, which we can export, are being presented. The list enables simultaneous choosing (marking) of a few projects. Above the list of projects are switches which enable to determine formats, in which we want to conduct the export.

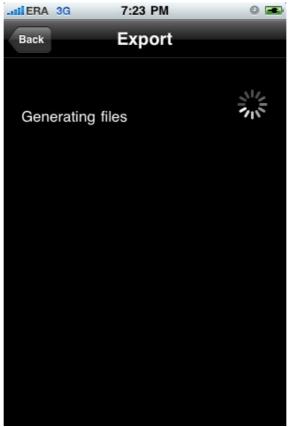
The transition to the window of the export is coming after choosing an *Export* option. The transition to the export window is possible only after emphasizing at least one project.



Picture 37: Window of selection of projects for export

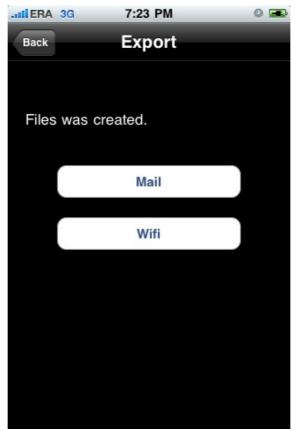
11.2. Window of the export of files

After choosing an option export on the list of files, the program is setting about generating files. A window of generating files is confirming the work of the application.



Picture 38: Window of generating files

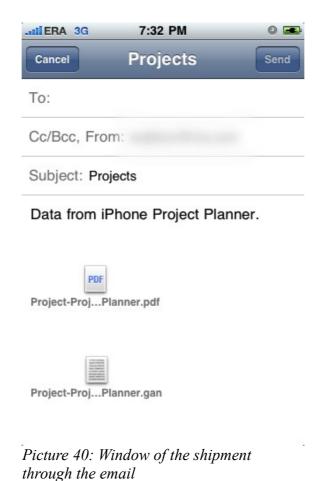
After generating files the application enables to choose the type of the export, sending exported files by the email, or sending them to the computer via a network to WiFi is possible



Picture 39: Window of choice about the way of sending a file

11.3. File transfer through the email

After choosing the option of sending a file by the email, the program is opening the system window of creating the new letter. In the window projects already chosen for the export are given. It will be sufficient only to add the addressee of the letter and to press the button send.

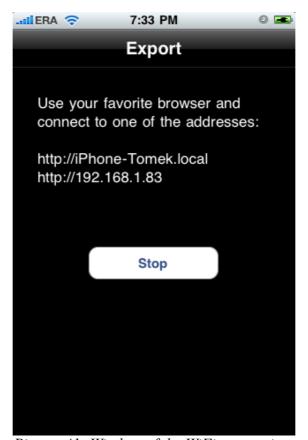


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11.4. File transfer through WiFi

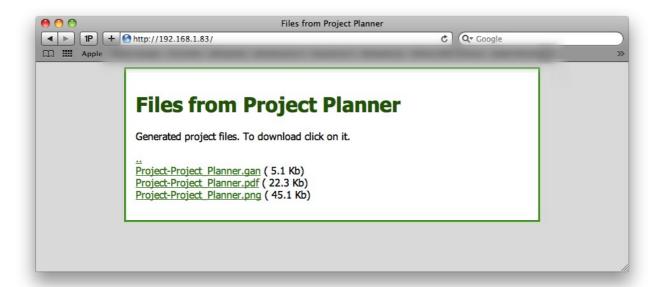
After choosing the option of sending files through WiFi a window of the WiFi connection is opening (attention, this window will only be started if in iPhone a WiFi service was included and connecting WiFi to the mains took place).

After opening a window the application is showing two addresses, under which exported data are accessible. The first address is an address in the Bonjour standard, it is possible to connect to it from the any computer with the OSX system, from Windows systems the connection is only possible if a customer of the Bonjour network of the Apple company was installed (available on the website http://apple.com). The other address has the IP form and it is possible to connect to them from any computer.



Picture 41: Window of the WiFi connection

To the connection we are using the any Web browser, writing one of above addresses down in the belt of the address. After the connection the viewer will show the straight web page containing the list of exported files. We can download files by clicking on their link.



Picture 42: List of files in the web browser

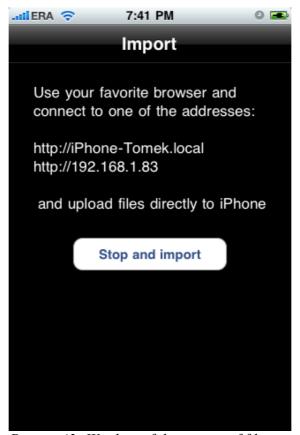
12. Import

The Project Planner application enables to import projects in the .gan format from the Gantt Project program (we are recommending using of the 2.0.10 version of this program).

It is possible to transfer the project, created and written on a computer, to iPhone through WiFi, into the similar manner how an export is acting through WiFi

After choosing the option of the import, a window of the WiFi connection is openin (attention, this window will only be started if in iPhone a WiFi service was included and connecting WiFi to the mains took place).

After opening a window the application is showing two addresses, under which exported data are accessible. The first address is an address in the Bonjour standard, it is possible to connect to it from the any computer with the OSX system, from Windows systems the connection is only possible if a customer of the Bonjour network of the Apple company was installed (available on the website http://apple.com). The other address has the IP form and it is possible to connect to them from any computer.

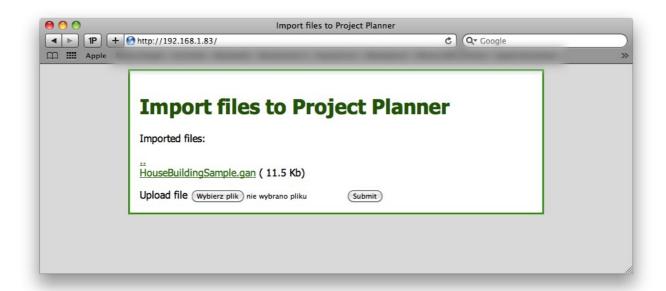


Picture 43: Window of the import of files

To the connection we are using the any Web browser, writing one of above addresses down in the belt of the address. After the connection the viewer will show the straight web page containing *Chose a file* button enabling choosing the file for loading and *Send* button enabling to send the chosen earlier file to iPhone.

Files are being sent to iPhone after pressing the *Send* button on the website, however loading them into the Project Planner program is taking place only after triggering the option ,, *Stop and import* " on the window of the import of files.

Attention: the import of the big file can take even several dozen seconds, in case of the simultaneous import of a few files the application can not match even a few minutes. It is normal action of the programme and you should not turn it off in the process of loading projects, because it can lead for implementing mistakes in data of the program.



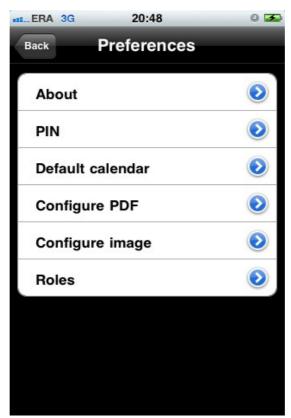
Picture 44: Web page of the import of files

13. Preferences

13.1. Main window of preferences

The main window of preferences enables to open windows of defining detailed parameters as:

- window "About" showing general information about the application
- window of PIN defining
- window of defining the default calendar
- window of the configuration of the PDF export
- window of the configuration of the image (PNG) export
- window of the edition of roles dictionary



Picture 45: Main window of preferences

13.2. Window "About"

Window "About" is showing vital statistics about the application:

- name of the program
- copyright
- currently used version of program



Picture 46: Window "About"

13.3. PIN settings

The window of PIN defining enables to turn on / off PIN which protects the application against the use by the unauthorized person.

On the window a switch Check PIN is available,

- to enable verification of the PIN, you must include the above-mentioned switch, then enter
 the PIN twice (takes control of correctness the compatibility of the two numbers entered)
 and press the *Set* button.
- to disable the PIN check, turn off the switch mentioned above, and then press the *Set* button.



Picture 47: Defining PIN

PIN verification takes place during startup. Launching application is not possible without giving the proper PIN.

Attention: in case of forgetting PIN you don't have the possibility of regaining him, or any other way of getting to the program. The only way of running a program, after forgetting PIN, is removing the program and its new installing.

13.4. Default calendar

The window enables to define the default calendar of application. The analogous window enables to define own calendars of projects.

13.4.1. Defining the calendar

The definition of the calendar consists by definition of the labour week (in the top of the window), and lists of holidays (in the lower part of the window)

Defining for every day we determine, whether it is the holiday, or a labour day (the hook means that the day is a labour day).



Picture 48: Window of defining the calendar

Adding holidays is held in a similar way to action of all windows of the list type.

13.4.2. Adding holidays

In the window of adding holidays for every holiday we determine:

- holiday name, text box
- date of the holiday, data field



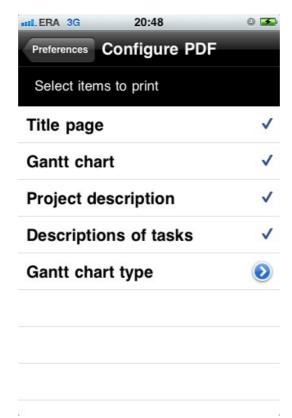
Picture 49: Window of adding the holiday

13.5. Configuration of the PDF export

The window of the configuration of the PDF export enables defining which from given elements are supposed to be placed in the report generated by the program.

The user can determine appearing of the following elements:

- Title page
- Gantt chart picture containing the chart on the daily pivot of the time
- Project description—table containing comparing all information about the project
- Descriptions of tasks—set of tables containing a summary of all information on all tasks in the project.
- Type of the Gantt chart choose from the list of layouts: day, week, month

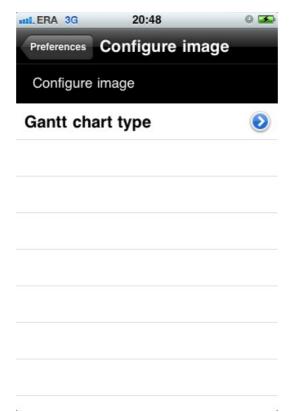


Picture 50: Window of PDF configuring

13.6. Configuration of the image (PNG) export

The window of the configuration of the image export enables defining which from given elements are supposed to be placed in the report generated by the program. The user can determine appearing of the following elements:

- Type of the Gantt chart – choose from the list of layouts: day, week, month



Picture 51: Window of image configuring

13.7. Roles

13.7.1. Roles list

When you select *Roles* from the *Preferences* menu, you will go to the roles management screen.

For each role listed, shows its:

name



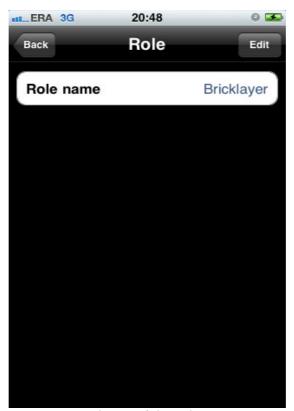
Picture 52: Roles list

After pressing the button ", +" we can add the new role, choosing the existing role causes undergoing this object editable.

13.7.2. Editing of the role

For each role is possible to determine:

- name of the project, text field



Picture 53: Editing of the role

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List of the illustrations

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