User Guide: Project Planning Pro v. 1.7

This Document is designed to help users in understanding and taking full advantage of Project Planning Pro app. With this app, users can create not only small but large Project Plans and manage them with ease.

Brought to You by:

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What is Project Planning Pro?

“Project Planning pro” is a popular Project Management app. The app allows easy planning and scheduling of project plans on the iPad. It permits importing of existing Microsoft Project Plans from the desktop and edit or update them on the iPad.
Planning Pro makes handling of large plans spreading from months to years, a cakewalk. This has become possible due to the interactive navigation and Gantt view feature of the app. This app has been tested with sample plans from varied industry and geography to ensure that the tool works with all kinds of MS Project plans. The App works with MS Project 2010, 2007 and 2003 versions

**Use Cases**
Managing Resources and Planning Accordingly
Managing Complex Business Projects
Managing IT or Engineering Projects
Organizing a wedding, a family get-together or a small/medium/large scaled party
Opening a new bakery business or planning for a real estate deal
And much more...
Getting Started
Having a workable plan is essential for the success of a Project. In simple steps, mentioned below, an effective and executable Project plan can be created.

Step 1: Create Task List and WBS

1.1 What is WBS?
WBS or Work Breakdown structure is the hierarchical list of the project’s phases, tasks & milestones. Having a well-defined WBS helps in avoiding reworks and false starts.

1.2 Create Summary Task and Sub Task
To Create Project:

- Tap on + button on top of screen.

- Name the Project
• Enter Start date and Author’s name

• Tap OK
• The Plan is Created

To Create Summary Task:
• Tap on + icon to add tasks
• Tap + and enter task name
- Enter Task 1

- Enter task 2 and task 3

  To create task 1 as the summary task of task 2 & task 3

- Tap gear icon of task 2 & tap indent
This makes task 1, the summary task of task 2
- Now tap indent in task 3 to make task 1 its summary task
- Task 1 becomes the summary task of task 2 & task 3

Hence, Task 1 is the summary task & task 2 & 3 are its subtasks

1.3 Edit Task and Set Attributes
Edit task in 3 ways:

1) Double tap on task
- Opens up Task Information window.
- Add task name, Scheduling Mode, Start Date, Finish Date
- Add Duration, % completed of task.
- Add task Notes

2) Single Tap on Gear icon

Tap on Gear icon to:
- Open Edit task dialogue box as shown above
- Add duration
- Change % completed
• Add notes
3) Gantt to Edit

- Go to Gantt view
- Tap on task.
- Slide the bar To Edit % Completed

- Remove Resources Assigned For Task
- Remove Task Dependencies

- Send Mail To Resource

- Change Start & Finish Date
1.5 Reorder tasks

Reorder task in 2 ways:

- Tap On Gear Icon & Reorder The Task

- Reorder by long tapping the task bar and drag task bar to reorder the tasks.
1.6 Auto and Manual Mode

Schedule tasks to manual or auto mode.

**Manual Mode**
Provided, flexibility to enter text-based values and document timing assumptions in the Start and Finish columns.

**Auto Mode**
Project engine schedules tasks based on the dependencies, calendars, and resources assigned to the project.

- Tap gear icon and tap auto task
• Task Information window will appear like this:
2) Indent or Outdent tasks to finalize the WBS

Once the task name fields are added, hierarchy is created amongst tasks. Indenting a task differentiates major phases of projects, by creating a summary task & various sub tasks.

2.1 Indent/Outdent to create summary tasks and sub tasks

- Select task name

Task 1

- Tap **Indent** to add subtask
- Task 1 becomes summary task

Task 1

Task 1.1

- Add more tasks to the group

Task 1

Task 1.1

Task 1.2

Task 1.3
2.2 Describe appearance of Summary task in Gantt chart

![Gantt chart with summary task](image)

2.3 Expand and Collapse to show or hide sub tasks

- Tap on – of Task 1 to hide task

![Gantt chart with collapsed task](image)

- Click on + Task 1 to show tasks

![Gantt chart with expanded task](image)

3) Enter Task durations or work estimates

Project Manager can estimate the time needed to complete the task by entering duration. Task duration is the total time needed to complete a particular task.
### 3.1 Enter task duration
- Tap on task information
- Tap on Duration
- Enter Duration

![Task Information](image)

### 3.2 Describe Duration
Duration or Work duration is the time needed to complete a task. In Project Planning Pro, one day comprises of 8 working hours. This is present in both default and custom calendar. By default:

- 1 day = 8 hours
- 5 days = 1 week
- 20 days = 1 month

This means, if the task duration is entered as 30 days, it is calculated as 6 weeks and not a month.
Duration must be entered in subtask level, as summary task is a calculated field.

3.3 Marking a task as Milestone

Milestones are markers of important completion points.
• To set tasks as Milestone, type 0 in duration column
• Mark task as milestone in Edit task window

3.4 Summary tasks duration
Summary task consolidates the total time taken in the completion of subtasks within it.

3.5 Add task to timeline
Add task to timeline in 2 ways:

• Tap on Edit task window
• Select Timeline
OR

- Tap on Task Information window
- Tap “Add to Timeline” button
- Offers Timeline view
- 3.6 Scheduling Options (Auto/Manual Schedule all tasks)----- Covered in point 1.6
4) Create dependencies between tasks

4.1 What are dependencies?
Dependency is the relationship between 2 tasks.

4.2 Why should you assign dependencies?
Assigning dependencies is essential as it determines the order in which activities or tasks need to be performed in a given project.

4.3 Types of dependencies
4 Types of Task dependency

1) Finish → Start (FS): First task must end before the second task starts. It is the commonest type of dependency.

2) Finish → Finish (FF): When the first task ends, only then can the second task end.

3) Start → Start (SS): Once the first task has started, the second one can also start.
4) Start→Finish (SF): Once the first task starts, the second one can finish.

Dependencies can be set, either while adding the task or later during edit process.

Another kind of dependency is the Lead and Lag Dependencies, as explained below:
Lead – Acceleration of successor task.

Example: Landscaping can be scheduled to start three weeks prior to the completion of the construction of the house. This would be a Finish-To-Start task dependency with a three week lead.

Lag – Delay in successor activity.

Example: Editing of an instruction manual could begin one week after the technical writers have begun. This would be a Start-To-Start task dependency with a one week lag.

How to assign a predecessor

- Tap on Predecessor in task information window
- Assign task ID
Choose from amongst the 4 given types of dependencies
• Change the lead/lag duration

5) Assign resources

5.1 What type of resources can you add in PPP?

Work type resources can be added in PPP.

5.2 How to assign a resource

In task information window:

• Select Resources tab
• Add Resources
Select from the available Resources

5.3 Enter cost of resource

- Cost/use is the one time cost of user
- Cost/hour is the per hour cost of resource

Step 6: How to Import Microsoft Project Plans

- PPP allows import of Microsoft Project Plans (MPP).
- Use Dropbox, Box and email
Step 7: Export Plans Format

Project Planning Pro writes files in several formats.

- Tap Export button on the screen.

Export PPP file from below mentioned options:
7.1 XML Document (Opens with MS Project)

Export via email
Export to Dropbox or Box.
Export Single or Multiple PDF document via mail.
7.3 CSV document (Opens with excel or Mind Vector app)

7.4 PPP File (Opens with Planning Pro)

- Attach .ppp file via mail
- Export to DropBox or Box.

**Step 8: Plan Views:**

The Project Plan can be viewed in different modes as showcased below:
8.1) Views

8.1.1) Calendar View

The Calendar View offers the detailed information about Project Plan.

- Shows time span of multiple projects, tasks & subtasks.
- Can be viewed in Day, Week & Month mode.
### 8.1.2 Critical Path View

Critical Path View represents certain tasks whose delay can make a negative impact on the progress of project. It highlights Tasks and their dependencies.
8.1.3 Resource View

Resource View showcases all the resources assigned to the Project. It also showcases:

- Name of resource
- Email
- Task
- Cost/Use
- Cost/hour
- Work
- Total Cost
- % Completed

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Tasks</th>
<th>Cost/Use</th>
<th>Cost/hour</th>
<th>Work</th>
<th>Total Cost</th>
<th>% Completed</th>
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</thead>
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<td>$0</td>
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<td>1</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8.2) Custom Calendars
It indicates a calendar that can be customized as per the Project’s requirements and can vary in working hours, weekly offs, holidays and more.

8.2.1 How to create a custom calendar
Tailor the calendar as per organizational requirements.
a) Select Weekly Offs.
b) Define holidays by tapping on date

c) Set working hours
By selecting the check box for Saturday, you will mark it as a 'Working Exception'.
d) Mark Exceptions

8.2.2 Enterprise calendar and Project Calendar

Enterprise Calendar indicates a particular calendar that can be assigned to all the projects.
• Tap on settings button on Project list page

• Select Calendar

• Tap + and add Enterprise calendar
• Tap on Save Button
• Enterprise Calendar will now be available across all projects

  Typical Enterprise Calendar has:

  a) 8 hours working per day

  b) Saturday & Sunday Off.

**Project Calendar**

Project Calendar signifies a custom calendar dedicated solely to a single project.

• Tap on “My Plan” Project
• Tap the settings icon

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Project Calendar signifies a custom calendar dedicated solely to a single project.
- Tap on “My Plan” Project
- Tap the settings icon

- Select Calendar
  - Choose either the inbuilt calendars or create custom calendar

- Tap on + icon and create custom calendar as in 8.2.1

8.2.3 Switching Calendars
Project calendars can be switched while the project is in progress. Switching the calendar makes an impact on the duration and work output of the project on which it is applied.
To switch calendar:

- Tap on the calendar which suits your project needs
- Tap + to create a custom calendar

**Step 9: Currency selection/Backup plan**

9.1 Currency Selection

- Tap on settings icon within the Project
9.2 Backup Plan
Backup Plan option allows the user to create Backup of the plan he is working on. This saves the plan & ensures that no data is lost, due to unforeseen circumstances.

9.2.1 How to create Backup plan
- Tap on Settings icon and select backup Options
- Tap Create Backup
- PPP allows creation of only one backup per project
10) Switch languages

- Tap on settings on Project List page

- Select Switch Language
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Software development plan</td>
<td>18-Aug-2014</td>
<td>27-Oct-2014</td>
</tr>
<tr>
<td>Bridge Maintenance</td>
<td>18-Feb-2014</td>
<td>14-Mar-2014</td>
</tr>
<tr>
<td>Building Construction</td>
<td>13-Feb-2014</td>
<td>13-Feb-2014</td>
</tr>
<tr>
<td>My Plan</td>
<td>03-Feb-2015</td>
<td>03-Feb-2015</td>
</tr>
</tbody>
</table>

- Select Language
- Start using Project Planning Pro
Step 10: Other Options:

On RHS will offer you multiple other options such as:

- Scheduling Options
- Backup Options
- Calendar
- Currency Symbol
- Add Columns
- Help

Refer to Help for more information.

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End of Document--------------------------------------