The Plan Handbook

Dag Andersen

Contents

Abstract

Chapter 1

Introduction to Plan

1.1 Introduction

1.1.1

Features include:

- Task management using the Task Editor

  - Work breakdown structure with configurable WBS codes
  - Tasks, summary tasks, and milestones
  - Different types of time constraints
  - Different types of dependencies.

- Resource management using the Resource Editor

  - Resource breakdown structure
  - Working- and material resource types
  - Resource allocation on group level
  - Resource teams

- Work time & vacation definition using the Work and Vacation Editor

- Cost management using the Cost Breakdown Structure Editor

- Earned value management

- Project scheduling using the Schedules Editor

  - Schedule forward from start time or backward from finish time
  - Allow or avoid resource overbooking
  - PERT distribution with optimistic-, pessimistic-, and most likely estimates
  - Multiple schedules with a possibility to schedule from current progress information

- Task tracking using the Task Execution View or Task Status View

1.2 Definitions

1.2.1

1.2.1.1 Introduction

In project management, terms may be used in different ways in different programs or different companies or project types. Looking at more exhaustive project management glossaries, one will find alternative definitions for most terms.

This list defines how certain terms are used in **Plan**.

1.2.1.2 Terms

Account

An account is used in a *Cost Breakdown Structure* (CBS) to represent a place where cost from tasks or resources can be aggregated.

ACWP

Actual Cost of Work Performed

Actual Cost of Work Performed

The actual cost (or effort) that has been performed.

Allocation

Tasks are allocated to Resources during the planning stage of the project. The actual assignment is done during scheduling. Note that assignment is not guaranteed as the resource may not be available.

Assignment

Tasks are assigned to Resources during scheduling.

BCWS

Budgeted Cost of Work Scheduled

Budgeted Cost of Work Scheduled

The cost (or effort) that should have been used in order to reach the stated progress.

BCWP

Budgeted Cost of Work Performed

Budgeted Cost of Work Performed

The cost (or effort) that has been performed.

CBS

Cost Breakdown Structure

CPI

Is the *Cost Performance Index* and is equal to BCWP/ACWP. When this index is below 1, means that you are over budget. If the index is greater than 1 means that the costs are under budget.

Cost Breakdown structure

The CBS organizes accounts into a structure to enable cost to be aggregated independent of the WBS and RBS.

Estimate

The estimate is the expected amount of effort or time needed to complete a task.

Milestone

A milestone is a task with an effort of 0.00h. It is typically used to mark a major outcome, for example the completion of a deliverable upon customer acceptance.

PERT

Program Evaluation and Review Technique

Program Evaluation and Review Technique

The Program Evaluation and Review Technique is an enhancement to the Critical Path Method. Task effort estimates in CPM are point estimates, while task effort estimates in PERT are computed by weighting the Optimistic, Most Likely, and Pessimistic estimates (O+(4*M)+P)/6.

PERT Distribution

A simplified way to calculate Expected estimate from Optimistic-, Most Likely- and Pessimistic estimate.

RBS

Resource Breakdown Structure

Resource Breakdown Structure

The RBS organizes resources into resource groups.

Resource

A resource can be of type *Work*, *Material* or *Team*. A resource must always belong to a Resource Group.

Resource Group

A resource group is used to group similar resources.

Resource Team

A resource team is a resource that consists of a number of other resources.

SPI

Is the Schedule Performance Index and is equal to BCWP/BCWS. When this index is below 1, means that you are behind schedule. If the index is greater than 1 means that you are ahead of the schedule.

Summary Task

A Summary Task has subordinate Sub-Tasks, and rolls up information based on the Sub-Tasks.

Task

A Task is a unit of work. Resources are generally allocated at the Task level.

vCard

vCard is a file format standard for electronic business cards.

WBS

Work Breakdown Structure

Work Breakdown Structure

The WBS is used to break down large projects into manageable chunks to ease planning and management.

1.3 Context Help

1.3.1

Many functions and views have help and hints that can be displayed with the *What's This* function.

You can activate it with the menu entry **Help** → **WhatsThis** or keyboard shortcut **Shift-F1**.

In dialogs it is activated by pressing the ? in the dialogs title bar.

1.4 Main Work Space

1.4.1

1.4.1.1 Description

The Main Work Space is normally organized with the View Selector to the left and the data view to the right.

As usual, you will also find the Menu bar and Toolbar at the top, and the Status bar at the bottom.

Since both the View selector and the Scripts docker are dockers they can be moved to the different border, floated or hidden. To show a hidden docker, use the **Settings** → **Dockers** menu entry.
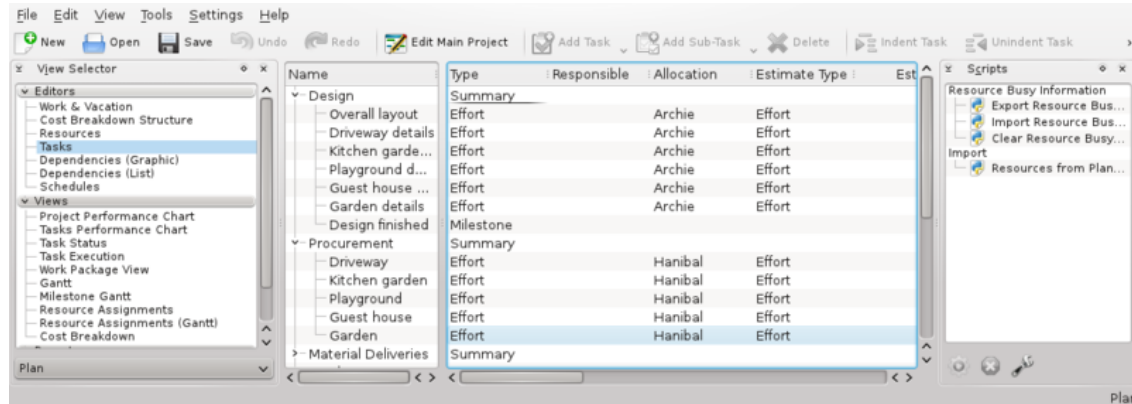
1.4.1.2 The View Selector

The View Selector enables you to select the data view you want to display from the currently listed views.

Views are grouped into categories for easier retrieval: Editors, Views, Execution and Reports by default:

- Editors holds the editors that you need to define and schedule your project.

- Views holds views that are used for inspecting your project.

- Execution holds views that are especially useful during the execution of your project.

- Reports holds views for report generation.

Views can also be moved within or across categories, or added to or removed from the View Selector.

1.4.1.3 Schedule Selector

The Schedule Selector enables you to select the schedule all the views (e.g. Gantt View) shall display values from. Tasks which has not been scheduled in the selected schedule are not normally shown in any of the views. (They are shown in editors, of course.)

1.4.1.4 Status Bar

The status bar shows messages and progress information. Most notably is the currently selected schedule shown at the right of the status bar. Note that most of the views in the *Views* category display information depending on the selected schedule, so if the project is not scheduled (*Not Scheduled*), most views will be empty.

1.5 Using the Views

1.5.1

1.5.1.1 Description

The Task Editor is a view that displays task data in a tree structure. Most data in the Task Editor can be edited in situ.
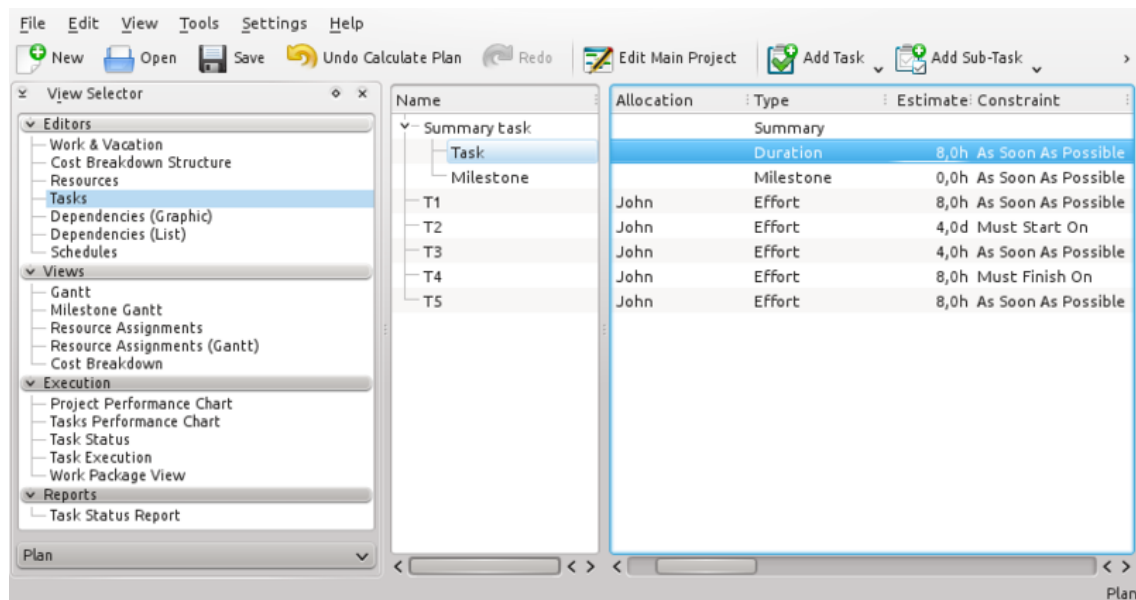
1.5.1.2 Navigation

You can navigate the tree structure using the keyboard:

+	Expand an expandable row.
-	Collapse a collapsible item.
Arrow left	Go to previous column in the same row.
Arrow right	Go to next column in the same row.
Arrow up	Go to previous row in the same column.

Arrow down	Go to next row in the same column.
Home	Go to first row, first column.
End	Go to last row, last column.
Page up	Go to first visible row in the same column.
Page down	Go to last visible row in the same column.

1.5.1.3   Editing data

Editable items are opened for editing by double-clicking on the item or, if using the keyboard, pressing **F2** will open the current item.

When editing an item you can navigate to the next editable item as follows:

Ctrl-Alt-Arrow left	Go to the previous editable item in the same row.
Ctrl-Alt-Arrow right	Go to the next editable item in the same row.
Ctrl-Alt-Arrow up	Go to the next editable item in preceding rows.
Ctrl-Alt-Arrow down	Go to the next editable item in succeeding rows.

1.5.1.4   Drag & drop and copy/paste

Most views support drag & drop and copy/paste. Charts and Gantt charts can be dragged to applications that support images. Table data uses the html mime type, so can be dropped on any applications that supports this. If the view supports moving or copying items internally e.g. the Task Editor, items can also be moved or copied.

Chapter 2

Guidelines

2.1 Creating a Project

2.1.1

A new project can be created by pressing the *New Project* button or selecting a *project template* in the Startup View.

This will create a new project with default values defined in Settings or from values defined in the template. The Project Settings Dialog will open to enable you to define project specific properties like *project name*, *manager* and *target times*.

When you create your first project, consider creating resources in a separate file. When you refer to this file in your project(s), you do not need to define your resources again, and you can coordinate resource usage across projects.

See Managing Resources.

If you want to coordinate resource usage across projects, your project files must be stored in the same directory.

A useful structure could be something like this:

```
Plan
!-- Resources
!      !-- SharedResources.plan
!-- Taskmodules
!      !-- Task modules (if any)
!-- Templates
!      !-- Project templates (if any)
!-- Projects
!      !-- <project 1>.plan
!      !-- <project 2>.plan
!      !-- etc
```

2.2 Managing Resources

2.2.1 Description

You can create resources for a project using the Resource Editor and Work and Vacation Editor.

However, if you are going to use the same resources in many projects (which is often the case) it is more convenient to maintain resources in a separate file. The best way to do this is to create your resources file first and then set up Plan to always load this file when creating a new project.

If you are managing projects that use totally different resource pools you can create multiple resource files, but one project can only refer to one resource file.

You can select the resource file to use when creating a new project.

2.3 Creating ODT Report Templates

2.3.1

2.3.1.1 Description

Open Document Text report templates are regular ODT files that can be designed using any ODT word processor like *Calligra Words* or *LibreOffice Writer*. The technique used is to use *user field* variables to hold references to the information that shall be fetched from the project. The variables are called *User Fields* in *Writer* and can be found under **Insert** → **Field** → **More Fields** → **Variables** → **User Fields**. In *Words* they are called *Custom Variables* and can be found under **Text Editing docker** → **Variable** → **Custom**.

The easiest way to create a new report template is to modify an existing one as all user fields are defined.

2.3.1.2 User Field Variables

2.3.1.2.1 Variables

The variables are used to enable the generator to extract data from the project.

A variable can be a reference to a single data field, a reference to table data or a reference to chart data.

2.3.1.2.1.1 Single Data Field

A single data field variable has the following format:

data group name.*property* = *property identifier*

where:

- `data group name` can be tr, project or schedule (see below).

- `property` makes the user field name unique.

- `property identity` identifies the property in the data group.

2.3.1.2.1.2 Table Data

A table in a report template consists of a variable to specify the data table to use.

The variable name must start with `table` (e.g. tableTasks) and the variable value must be the name of the data table (e.g. tasks).

Immediately after the variable, a table must be inserted and columns filled with user field variables that specify which properties to fetch from the table specified above. These variables must have names that start with the name of the table variable above.

These variables have the following format:

tableTasks.*property* = *property identifier*

where:

- **property** makes the user field name unique.

- **property identifier** identifies the property in the data group.

2.3.1.2.1.3 Chart Data

A chart in a report template consists of a variable to specify the data to use in the chart.

The variable name must start with *chart* (e.g. chartBudgetCost) and the variable value specifies the data group and values to populate the chart.

The variable has the following format (note the semicolons):

name = *data group*; values=*comma separated list of data properties*;

where:

- *name* must start with **chart** (e.g. chartBudgetCost)

- *data group*

- **comma separated list of data properties** identifies the properties in the data group.

E.g.:

chartBudget = project; values=bcws cost, bcwp cost, acwp cost;

2.3.1.2.2 Translated Labels

Translated labels enable us to produce general report templates that can be used in different languages.

Variable Name	Variable Value
tr.project	Project
tr.manager	Manager
tr.schedule	Schedule
tr.bcws	BCWS
tr.bcwp	BCWP
tr.acwp	ACWP
tr.spi	SPI
tr.cpi	CPI

2.3.1.2.3 Project Values

Shows values from the main project.

Variable Name	Variable Value	Description
project.name	Name	The name of the project

project.manager	Manager	The name of the project manager
project.bcwscost	BCWS Cost	Cost based Budgeted Cost of Work Scheduled
project.bcwpcost	BCWP Cost	Cost based Budgeted Cost of Work Performed
project.acwpcost	ACWP Cost	Cost based Actual Cost of Work Performed
project.spicost	SPI Cost	Cost based Schedule Performance Index
project.cpicost	CPI Cost	Cost based Cost Performance Index
project.bcwseffort	BCWS Effort	Effort based Budgeted Cost of Work Scheduled
project.bcwpeffort	BCWP Effort	Effort based Budgeted Cost of Work Performed
project.acwpeffort	ACWP Effort	Effort based Actual Cost of Work Performed
project.spieffort	SPI Effort	Effort based Schedule Performance Index
project.cpieffort	CPI Effort	Effort based Cost Performance Index

2.3.1.2.4 Schedule Values

Shows values from the current schedule.

Variable Name	Variable Value	Description
schedule.name	Name	The name of the schedule
schedule.state	State	Scheduling state
schedule.direction	Name	Scheduling direction
schedule.overbooking	Overbooking	Overbooking
schedule.distribution	Distribution	Distribution
schedule.plannedstart	Planned Start	Planned Start
schedule.plannedfinish	Planned Finish	Planned Finish
schedule.scheduler	Scheduler	Scheduler
schedule.granularity	Granularity	Granularity
schedule.mode	Mode	Scheduling mode (Auto or Manual)

2.3.1.2.5 Tables

Supported table types:

- tasks
- taskstatus
- schedules
- projects

To create a table, place a variable just before a table in your template file. The variable name identifies the table and must start with **table**, e.g. **tableTaskStatus**.

The value of the variable is used to point to the data to be fetched and must be one of the supported tables listed above, e.g. **taskstatus**.

You then put variables inside the table cells with name and value from the table below.

Note that the schedules table supports the values described in Schedule Values above.

The projects, tasks and taskstatus tables supports the following values:

Variable Name	Variable Value	Description
table name.name	Name	The name of the task or project
table name.wbscode	WBS Code	
table name.type	Type	Type of task
table name.responsible	Responsible	
table name.allocation	Allocation	
table name.estimatetype	Estimate Type	
table name.calendar	Calendar	
table name.estimate	Estimate	Most likely estimate
table name.optimistic	Optimistic	Optimistic ratio
table name.pessimistic	Pessimistic	Pessimistic ratio
table name.risk	Risk	Estimate uncertainty
table name.constraint	Constraint	Type of time constraint
table name.constraintstart	Constraint Start	Constraint start time
table name.constraintend	Constraint End	Constraint finish time
table name.runingaccount	Running Account	Account for running costs
table name.startupaccount	Startup Account	Account for startup cost
table name.startupcost	Startup Cost	The cost incurred at startup of the task
table name.shutdownaccount	Shutdown Account	Account for shutdown cost
table name.shutdowncost	Shutdown Cost	The cost incurred at shutdown of the task
table name.description	Description	Task description
table name.expected	Expected	Calculated most likely estimate
table name.optimistic	Optimistic	Calculated optimistic estimate
table name.pessimistic	Pessimistic	Calculated pessimistic estimate
table name.starttime	Start Time	Scheduled start time
table name.endtime	End Time	Scheduled finish time
table name.duration	Duration	Scheduled duration
table name.earlystart	Early Start	Earliest possible start
table name.earlyfinish	Early Finish	Earliest possible finish
table name.latestart	Late Start	Latest possible start
table name.latefinish	Late Finish	Latest possible finish

table name.positivefloat	Positive Float	
table name.freefloat	Free Float	
table name.negativefloat	Negative Float	
table name.startfloat	Start Float	
table name.finishfloat	Finish Float	
table name.assignaments	Assignments	Resource assignments
table name.varianceest	Variance (Est)	Calculated estimate variance
table name.variancedur	Variance (Dur)	Calculated duration variance
table name.optimisticdur	Optimistic (Dur)	Calculated optimistic duration
table name.pessimisticdur	Pessimistic (Dur)	Calculated pessimistic duration
table name.status	Status	Task status as shown in Task Status View
table name.completion	% Completed	Task completion
table name.plannedeffort	Planned Effort	Planned effort
table name.actualeffort	Actual Effort	Actual effort
table name.remaningeffort	Remaining Effort	Remaining effort
table name.plannedcost	Planned Cost	Planned cost
table name.actualcost	Actual Cost	Actual cost
table name.actualstart	Actual Start	Actual start
table name.started	Started	
table name.actualfinish	Actual Finish	Actual finish
table name.finished	Finished	
table name.schedulingstatus	Scheduling Status	Scheduling status
table name.bcws	BCWS	Budgeted Cost of Work Scheduled (cost based)
table name.bcwp	BCWP	Budgeted Cost of Work Performed (cost based)
table name.acwp	ACWP	Actual Cost of Work Performed (cost based)
table name.spi	SPI	Schedule Performance Index
table name.critical	Critical	Task is critical
table name.criticalpath	Critical Path	Task is in critical path
table name.notscheduled	Not Scheduled	Not interesting
table name.assignmentmissing	Assignment Missing	Not interesting
table name.resourceoverbooked	Resource Overbooked	Not interesting
table name.resourceunavailable	Resource Unavailable	Not interesting
table name.constrainterror	Constraints Error	Not interesting
table name.effortnotmet	Effort Not Met	Not interesting

`table name`.schedulingerror	Scheduling Error	Not interesting
`table name`.level	Node level, Level	Not interesting
`table name`.statusnote	Status Note	Note: Not implemented
`table name`.owner	Owner	Must not be used, and are not very interesting
`table name`.status	Status	Must not be used, and are not very interesting
`table name`.time	Time	Must not be used, and are not very interesting

2.3.1.3 Chart

Use by placing a variable with name chartX (X=some text to make the variable name unique) with a value project before the chart that shall be used.

The variable has this format:

Variable: `Name:  chartX (X=some text) Value:  project; values=data;`

where `data` is a comma separated list of values to be include in the chart.

Possible `data` values are:

- **bcws effort** Budgeted cost of work scheduled, effort based.

- **bcwp effort** Budgeted cost of work performed, effort based.

- **acwp effort** Actual cost of work performed, effort based.

- **spi effort** Schedule performance index, effort based.

- **cpi effort** Cost performance index, effort based.

- **bcws cost** Budgeted cost of work scheduled, cost based.

- **bcwp cost** Budgeted cost of work performed, cost based.

- **acwp cost** Actual cost of work performed, cost based.

- **spi cost** Schedule performance index, cost based.

- **cpi cost** Cost performance index, cost based.

The charts you create in your template must have the same (or more) number of columns as the number of values you specify in your variable.

Example:

Variable name: `chart1` **Value:** `project; values=bcws cost,bcwp cost, acwp cost;`

Note that you cannot mix effort- and cost-based values. If you want to show both, create two charts.

2.3.1.3.1 Gantt

Not supported.

Chapter 3

Views and Editors

3.1 Startup View

3.1.1

The Startup View is shown at startup and when **File** → **New** is selected.

It has 3 sections for:

- Creation of new projects. See also Creating a Project and Managing Resources

- Opening existing projects. This section gives you the possibility to open an existing project file or one of the 10 most recent projects you have opened.

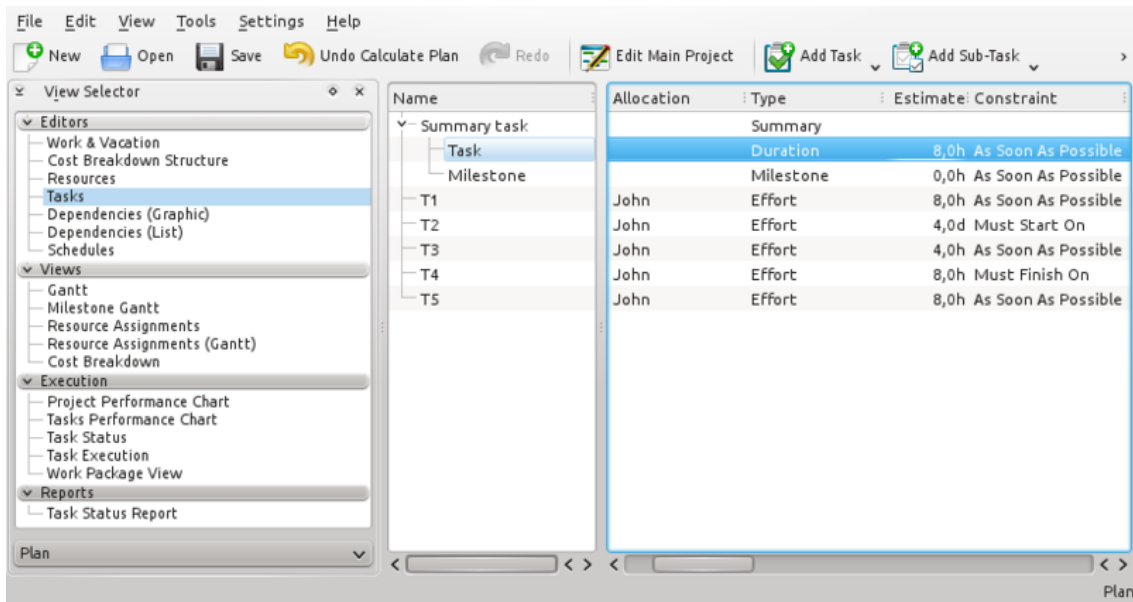- The Help section gives you links to introductory pages, documentation and community forum.

3.2 Task Editor

3.2.1

3.2.1.1 Description

The Task Editor is used to create, edit, and delete tasks.

Tasks can be organized into a hierarchical tree structure to any depth.

3.2.1.2 Toolbar

The toolbar provides the means to create, delete and move tasks and milestones:

Button	Shortcut	Description
Add Task	**Ctrl-I**	Dropdown box to create a task or milestone. The new item is positioned after the currently selected item on the same level as the selected item. If no item is selected, the new item is appended at the top level.
	Ctrl-Alt-I	
Add Sub-task	**Ctrl-Shift-I**	Dropdown box to create a sub-task or -milestone. The new item is appended as a child to the currently selected item.
	Ctrl-Shift-Alt-I	
Delete Task	**Delete**	Deletes the selected tasks.
Indent Task		Appends the selected task as a child to the task above.
Unindent Task		Moves the selected task one level up, inserting it after its current parent task.
Move Up		Moves the selected task up one place.
Move Down		Moves the selected task down one place.

Note that you can also move or copy tasks using drag and drop or copy/paste.

3.2.1.3 Editing data

Data can be edited inline as described here or by using the Task Settings Dialog.

The following columns are displayed as default:

Column	Description
Name	The name of the task.
Status	Task status
Responsible	The person responsible for this task.
Allocation	List of resource allocations.
Type	The type of task or the estimate type of the task. The type can be set to *Milestone*, *Effort* or *Duration*. **Note:** If the type is *Summary* or *Project* the type is not editable.
Calendar	The calendar used when estimate type is *Duration*.
Estimate	The most likely estimate. The estimate is the expected amount of effort or time needed to complete a task. It can be expressed in different units: h (hours), d (days), w (weeks) and M (months).
Optimistic Ratio	Optimistic estimate expressed as a negative percentage of the most likely estimate. (E.g. -20%). This is only used if a PERT distribution is used.
Pessimistic Ratio	Pessimistic estimate expressed as a positive percentage of the most likely estimate. (E.g. 50%). This is only used if a PERT distribution is used.
Risk	Risk controls the PERT distribution used when calculating the actual estimate for this task.
Constraint	The timing constraint type.
Constraint Start	Constraint start time.
Constraint End	Constraint end time.
Running Account	Account for running costs.
Startup Account	Account for cost incurred at startup of the task.
Startup Cost	The cost incurred at startup of the task.
Shutdown Account	Account for cost incurred at shutdown of the task.
Shutdown Cost	The cost incurred at shutdown of the task.
Description	Task notes.

3.2.1.4 Task Modules Docker

Task Modules are groups of tasks that can be reused across projects.

This makes it possible to draw on past experience and to standardize similar operations.

A task module is inserted into your project by dragging it from the docker and dropping it into your project.

A task module is a regular plan file, and is designed using **Plan** in the same way as designing a regular project.

A task module, however, typically includes only tasks, estimates, and dependencies.

The project name is displayed in the docker, and the description is used as the tooltip.

A module can be opened for inspection or editing by double-clicking on the module.

The modules can be grouped by storing them in different directories. Where to search for them is configured using the Project Settings Dialog.

Default values for new projects can be defined using the Plan Configuration Dialog.

3.2.1.5 Resources Docker

The Resources Docker offers a simple way to allocate resources to tasks by selecting the resources you need and dragging them onto the *Allocation* column.
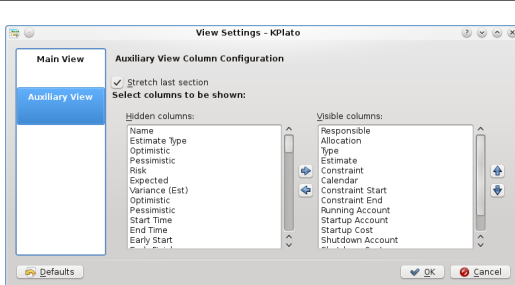
A resource can also be dropped on the *Responsible* column.

3.2.1.6 Allocations Docker

The Allocations Docker displays the current resource allocation for the selected task.

3.2.1.7 Configuration

Using the context menu, the view can be configured to show / hide the Project, split / unsplit the tree view or it can be configured using the configure dialog.

The configure dialog enables you to tailor the amount of information the view displays to fit your needs.

## 3.3 Resource Editor

3.3.1

3.3.1.1 Description

The Resource Editor is used to create, edit, and delete resources and resource groups. Resources must belong to a resource group. At the moment sub-groups are not allowed.
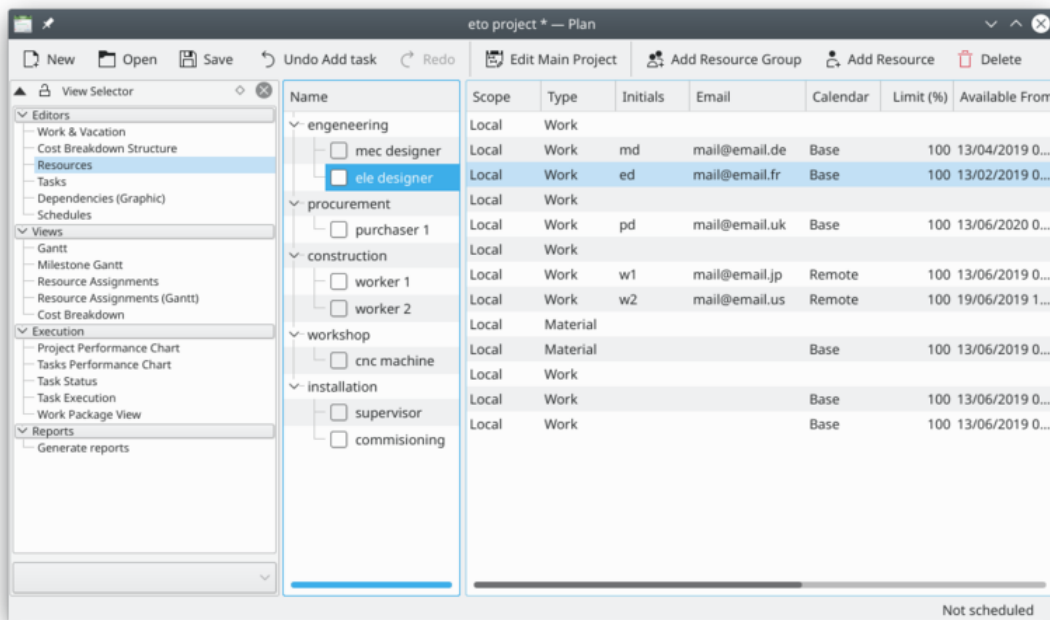
Working resources must refer to a *calendar* that defines the working hours for the resource. Calendars are created using the Work and Vacation Editor.

Material resources are by default always available. You can use a calendar to limit its availability.

Resources can be *Shared* or *Local*. A local resource is only used in the current project. A shared resource can be shared between multiple projects and is stored in a separate file, see Managing Resources.

3.3.1.2 Toolbar

The toolbar provides the means to create and delete resources and resource groups:

Button	Shortcut	Description
Add Resource Group	**Ctrl-I**	Button to create a resource group. The new group is appended at the end of the groups.
Add Resource	**Ctrl-Shift-I**	Button to create a resource. The new resource is appended as a child to the currently selected group. If a resource is selected, the new resource is appended to its parent group.

Delete	**Delete**	Deletes the selected resources and/or resource groups.

Resources can be created by dropping data from any application that supports dragging vCard information, like *KAddressBook* or *Evolution*.

Resources can be copied or moved to a different resource group using drag-and-drop.

> NOTE
> When moving a resource, the resource will lose any allocations.

3.3.1.3 Editing data

Data can be edited inline as described here.

Resources can also be edited using the Resource Settings Dialog.

The following columns are displayed as default:

Column	Description
Name	The name of the resource or resource group.
Scope	A resource can be *Shared* or *Local*. A shared resource cannot be edited.
Type	The type of resource or resource group.
Initials	The initials of the resource.
Email	The e-mail address of the resource.
Calendar	The calendar defines when the resource is working.
Limit (%)	The maximum load that can be assigned.
Available From	Defines when the resource is available to the project.
Available Until	Defines when the resource is available to the project.
Normal Rate	The cost per hour, normal hours.
Account	The account where the resource cost is accumulated.

3.3.1.4 Configuration

Using the context menu, the view can be configured to split/unsplit the tree view or it can be configured using the configure dialog.
The configure dialog enables you to tailor the amount of information the view displays to fit your needs.
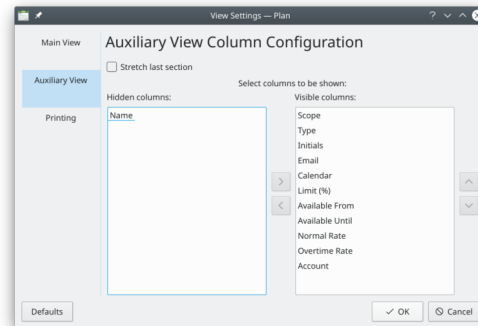
3.4 Work and Vacation Editor

3.4.1

3.4.1.1 Description

The Work and Vacation Editor is used to create, edit, and delete calendars.

Calendars define the working hours for resources. Calendars can also be used by tasks with estimate type *Duration*.

Calendars have a time zone specification so you can define working hours in the resources local time.

A calendar consists of definitions for weekdays and dates. If the date has a definition, this definition is used. If the state of the date is *Undefined*, the definition for the weekday is used. If this is also *Undefined*, the parent calendar is checked.

A calendar can be defined as *Default* and is then used by all working resources without a calendar reference.
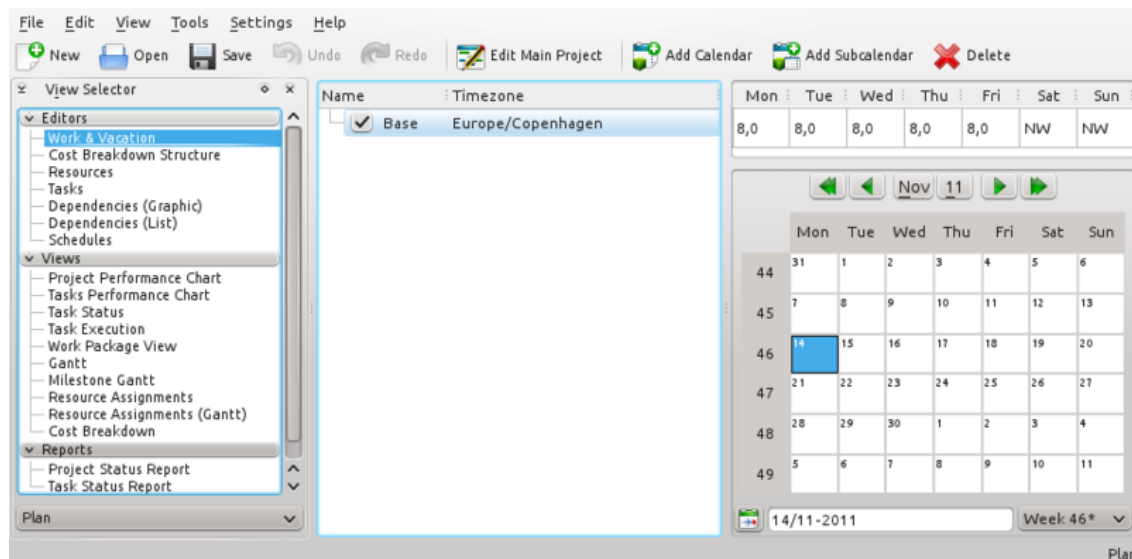
The toolbar provides the means to create and delete calendars:

Button	Shortcut	Description
Add Calendar	**Ctrl-I**	Button to create a calendar. The new calendar is appended on the same level as the selected calendar.
Add Subcalendar	**Ctrl-Shift-I**	Button to create child calendar. The new calendar is appended as a child to the currently selected calendar.
Delete Selected Calendar	**Delete**	Deletes the selected calendar.

3.4.1.2 Editing data

Calendar name and time zone can be edited inline as described here.

The state of days and weekdays are edited by selecting the day or days you want to edit and open the context menu.

Selecting *Work...* opens the Edit Work Intervals Dialog.

3.5 Cost Breakdown Structure Editor

3.5.1

3.5.1.1 Description

The Cost Breakdown Structure Editor is used to create, edit, and delete accounts.
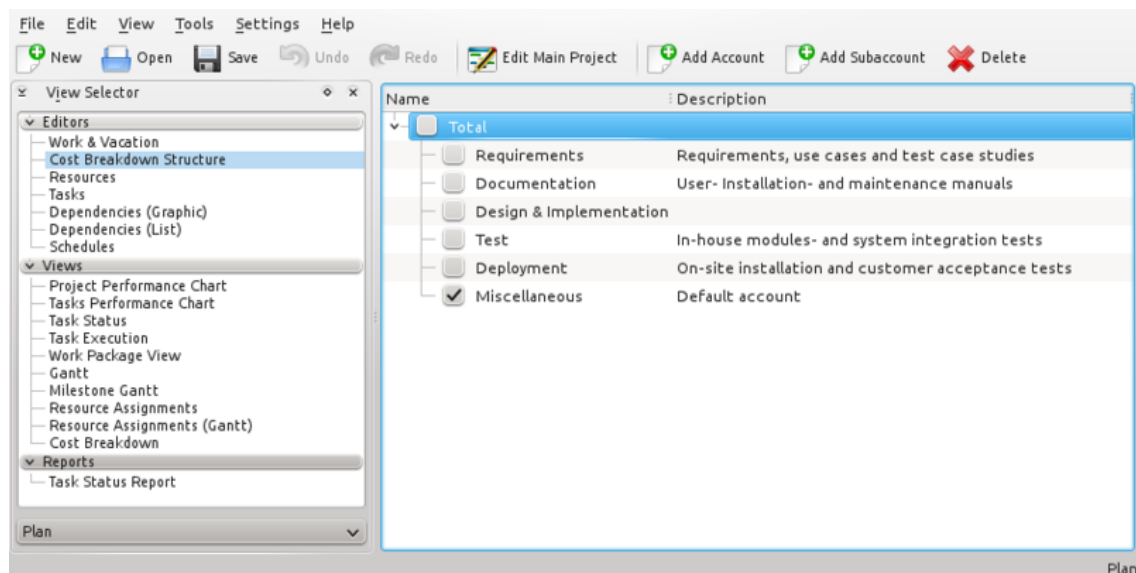
Accounts can be connected to by tasks and resources to accumulate costs from those tasks and resources.

The default account accumulates costs incurred from tasks that are not connected to an account.

3.5.1.2 Toolbar

The toolbar provides the means to create and delete accounts:

Button	Shortcut	Description
Add Account	**Ctrl-I**	Button to create an account. The new account is inserted after the selected account. If no account is selected, the new account is appended at the top level.
Add Subaccount	**Ctrl-Shift-I**	Button to create a sub-account. The new account is appended as a child to selected account.
Delete	**Delete**	Deletes the selected account.

3.5.1.3 Editing data

Data can be edited inline as described here.
The following columns are available:

Column	Description
Name	The name of the account.
Description	The description of the account.

3.6 Task Dependency Editor (Graphical)

3.6.1

3.6.1.1 Description

The Task Dependency Editor is used to create, edit, and delete task dependencies. For convenience, tasks can also be inserted, deleted or edited.

The tasks are ordered in accordance with the Work Breakdown Structure (WBS).
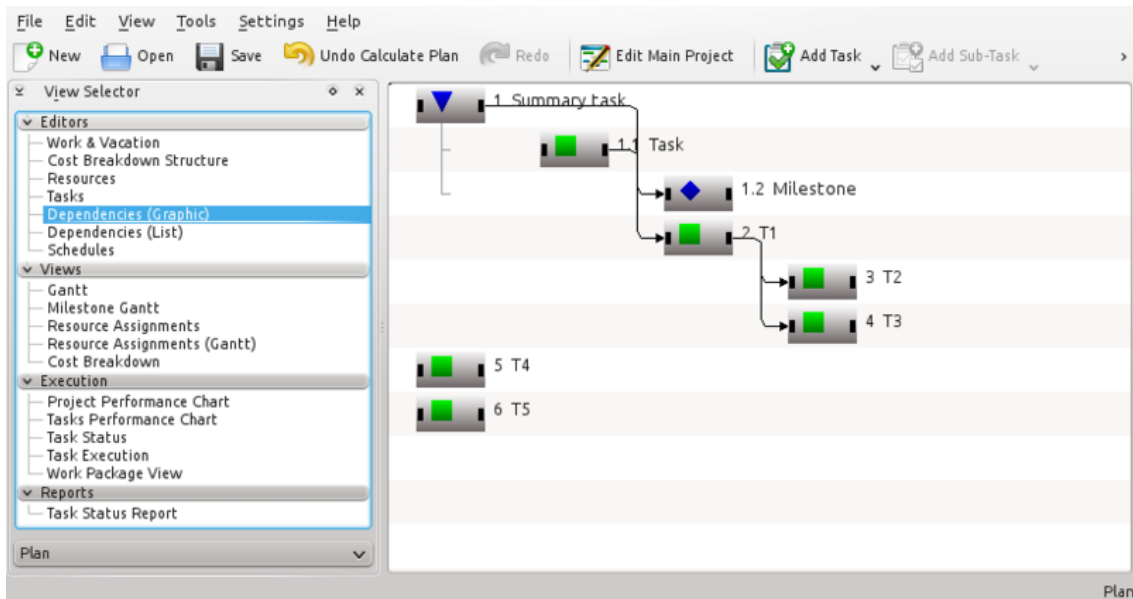
The symbols for summary tasks, tasks and milestones are shown below:

As the *Task* and *Milestone* are sub-items to the *Summary task*, they are indented. Also, note that the WBS code is displayed along with the name.

In the following figure, a *Finish-Start* dependency has been inserted to make *Milestone* depend on *Task*.

As shown below, an item consists of three different selection areas:

Item area	Select the item for editing
Start area	Used for creating *Finish-Start* and *Start-Start* dependencies
Finish area	Used for creating *Finish-Start* and *Finish-Finish* dependencies

3.6.1.2 Editing dependencies

Dependencies are created by first selecting a start- or finish area of the predecessor task, then selecting the start- or finish area of the successor task.

This can be done using the mouse or the keyboard.

Alternatively, you can drop the predecessor's connection area on the successor's connection area.

To edit or delete an existing dependency, you can open a dependency by selecting it, or open its context menu.

You can also open the context menu on a connection area which will enable you to edit all dependencies connected to that area.

3.6.1.3 Toolbar

The toolbar provides the means to create and delete tasks:

Button	Shortcut	Description
Add Task	**Ctrl-I**	Dropdown box to create a task or milestone. The new item is positioned after the currently selected item on the same level as the selected item. If no item is selected, the new item is appended at the top level.
Ctrl-Alt-I		
Add Sub-task	**Ctrl-Shift-I**	Dropdown box to create a sub-task or -milestone. The new item is appended as a child to the currently selected item.
Ctrl-Shift-Alt-I		
Delete Task	**Delete**	Deletes the selected tasks.

3.7 Task Dependency Editor (List)

3.7.1

> NOTE
> This view is not shown by default. For large projects, it can impact performance severely

It can be activated using the View Selector context menu.

3.8 Schedules Editor

3.8.1

3.8.1.1 Description

The Schedule Editor is used to create, edit, calculate and delete schedules.
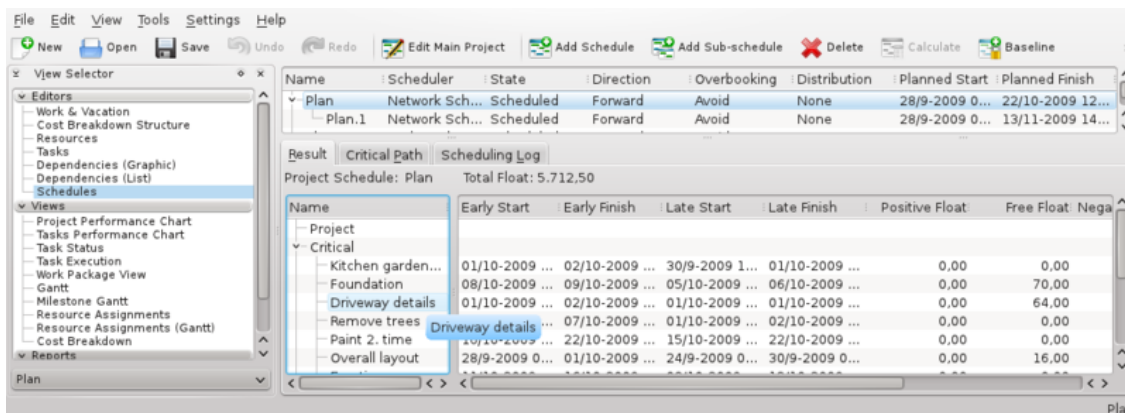
The Schedule Editor has three sub-views that show the results of the scheduling.

The Result sub-view shows the values needed for PERT analysis including early start and -finish, late start and -finish along with different types of float.

The Critical Path sub-view shows the tasks that belong to the critical path.

The Scheduling Log sub-view shows a list of messages produced during scheduling.

3.8.1.2 Toolbar

The toolbar provides the means to create, delete and calculate schedules:

Button	Shortcut	Description
Add Schedule	**Ctrl-I**	Button to create a resource group. The new group is appended at the end of the groups.
Add Subschedule	**Ctrl-Shift-I**	Button to create a sub-schedule. The new schedule is appended as a child to the currently selected schedule.
Delete	**Delete**	Deletes the selected schedule.
Calculate		Calculates the selected schedule.
Baseline		Baselines the selected schedule. Prevents the schedule from being re-calculated or deleted.
Detach		Make the selected sub-schedule a top schedule

3.8.1.3   Editing data

Data can be edited in-line as described here.
The following columns are displayed as default:
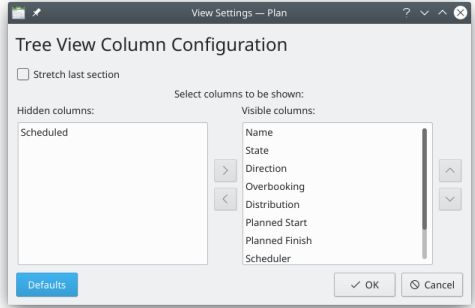
Column	Description
Name	The name of the schedule.
State	The schedules state. Shows a progress bar during scheduling.
Direction	The scheduling direction. If the direction is Forward, the project is scheduled starting at the project's earliest start time specified in the main project dialog. If the direction is Backward, the project is scheduled starting at the project's latest finish time specified in the main project dialog.

Overbooking	Controls resource overbooking when scheduling. If overbooking is allowed, a resource may be booked (on working days) to work more than it is available. This can happen if the resource is allocated to multiple tasks or are booked on other projects. If overbooking is to be avoided, resources will not be booked more than they are available. On resource conflict, tasks will be delayed until the resource is available.
Distribution	The distribution to be used during scheduling. If the distribution is 'None', the estimate of the task is used as-is during scheduling. If the distribution is 'PERT', the estimate (E) used is calculated based on the entered optimistic- (O), pessimistic-(P) and most likely (M) estimate. The formula used for this is: $E = (O + 4 * M + P) / 6$.
Planned Start	The scheduled start time.
Planned Finish	The scheduled finish time.
Scheduler	The scheduler used for calculating the project schedule. The default built-in scheduler is the Network Scheduler.

3.8.1.4 Configuration

|	
Using the context menu, the view can be configured to split/unsplit the tree view or it can be configured using the configure dialog. The configure dialog enables you to tailor the amount of information the view displays to fit your needs.	

3.9 Project Performance View

3.9.1 Description

The Project performance view is a project management chart where can be understood the actual situation of the project according to the Earned Value Method.
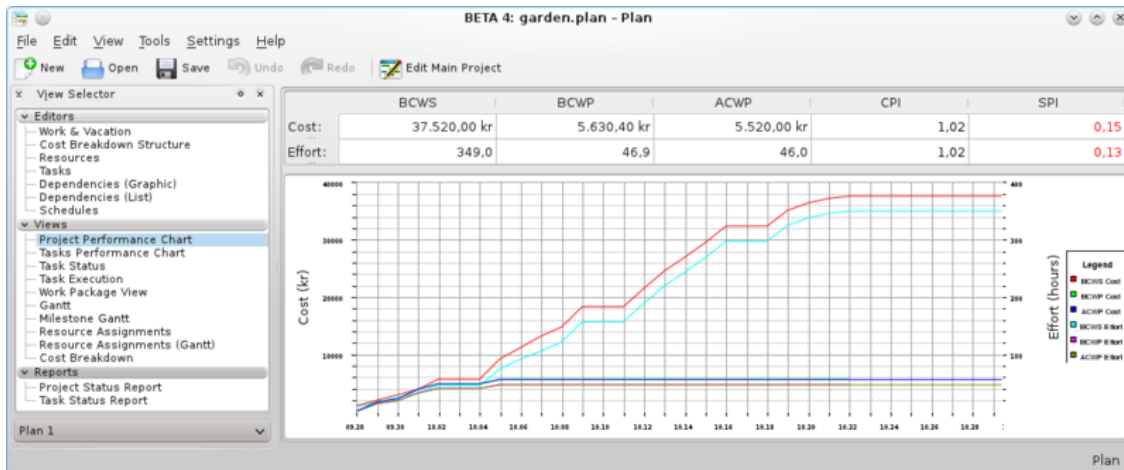
where:

- BCWS means Budgeted Cost Work Scheduled,

- BCWP means Budgeted Cost Work Performed,

- ACWP means Actual Cost Work Performed.

All these are considered as effort in hours and costs.
PI are the Performance Indexes, where:

- CPI is the Cost Performance Index,

- SPI is the Schedule Performance Index.
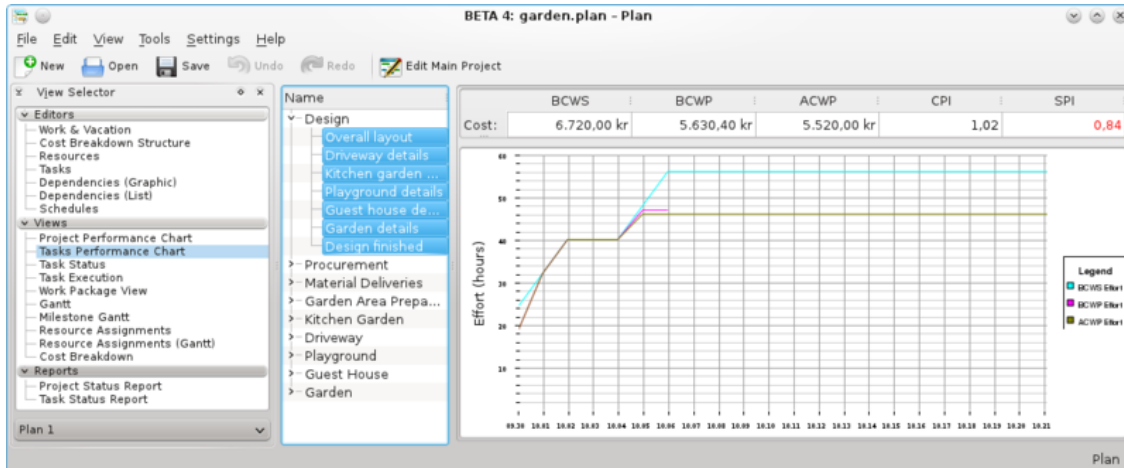
3.10 Task Performance View

3.10.1

On the task performance chart, we can analyze deeply each subtask or task with the same indexes as for the project performance view.

This is really useful in a long and complicated project.

On the left window, you can choose every single sub-task as well as an entire task, then on the right window will appear in the corresponding chart.

where:

- BCWS means Budgeted Cost Work Scheduled,

- BCWP means Budgeted Cost Work Performed,

- ACWP means Actual Cost Work Performed.

All these are considered as effort in hours and costs.
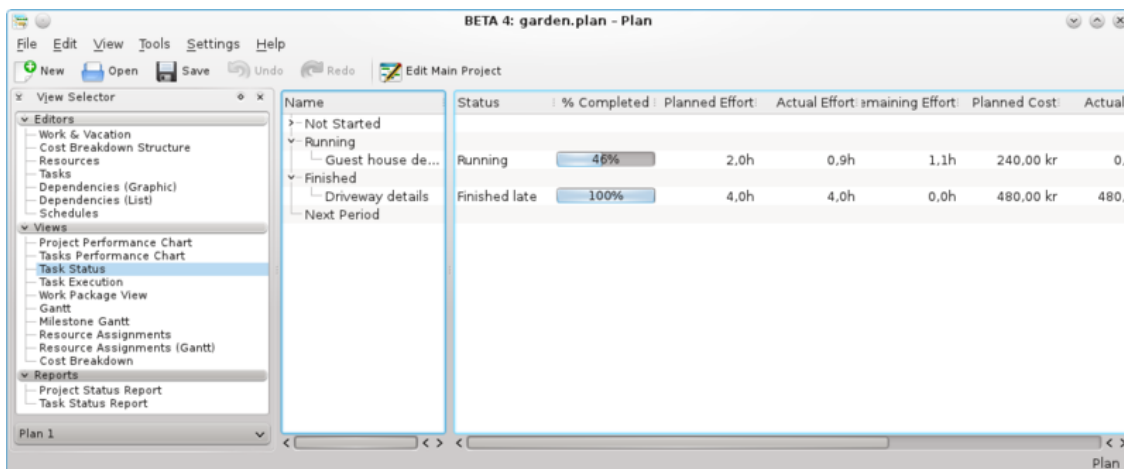PI are the Performance Indexes, where:

- CPI is the Cost Performance Index,

- SPI is the Schedule Performance Index.

3.11 Task Status View

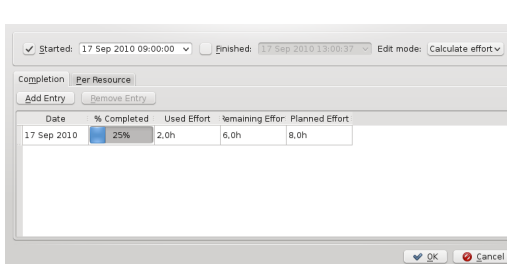### 3.11.1

3.11.1.1 Description

The Task Status View is used to inspect task progress information at a period, set in the configuration.

The tasks are divided into groups dependent on the status of the task:

Not Started	Tasks that should have been started by now.
Running	Tasks that have been started, but not yet finished.
Finished	Tasks that were finished in this period
Next Period	Tasks that are scheduled to be started in the next period.

3.11.1.2 Editing data

|	
Progress information can be edited in-line as described here or by using the task progress dialog.	

The following columns are displayed as default:

Column	Description
Name	The name of the task.
Status	Task status
% Completion	Task completion
Planned Effort	The amount of work planned to be used at the end of the current period.
Actual Effort	The amount of work spent.
Remaining Effort	The remaining effort needed to complete the task.
Planned Cost	The planned cost at the end of the current period.
Actual Cost	The actual cost incurred.
Actual Start	The actual start time of the task.
Actual Finish	The actual finish time of the task.

3.11.1.3 Configuration

Using the context menu, the view can be configured to split / unsplit the tree view or it can be configured using the configure dialog.

The configure dialog enables you to tailor the amount of information the view displays to fit your needs.	
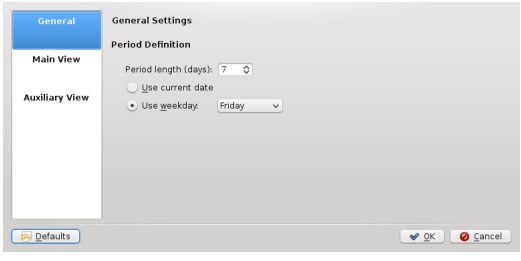
3.12   Task Execution View

3.12.1

3.12.1.1   Description

The Task Execution View is used to inspect task performance information.

3.12.1.2   Data

Progress information can be edited in-line as described here or by using the task progress dialog.	

The following columns are displayed as default:

Column	Description
Name	The name of the task.

Status	Task status
% Completed	Task completion
Responsible	The person responsible for this task.
Assignment	The resources assigned to this task.
SPI	Schedule Performance Index. (BCWP / BCWS)
BCWS	Budgeted Cost of Work Scheduled.
BCWP	Budgeted Cost of Work Performed.
ACWP	Actual Cost of Work Performed.
Description	Task description

3.12.1.3 Configuration

Using the context menu, the view can be configured to show / hide the Project, split / unsplit the tree view or it can be configured using the configure dialog.

The configure dialog enables you to tailor the amount of information the view displays to fit your needs.	

3.13 Task Gantt View

3.13.1

3.13.1.1 Description

The Gantt view is used to show tasks in a timeline.

Gantt View

Gantt View

3.13.1.2 Editing data

Task description and progress can be edited using the context menu.

The following columns are displayed as default:

Column	Description
Name	The name of the task.
Start Time	The scheduled start time.
End Time	The scheduled end time.
% Completed	Completion

3.13.1.3 Configuration

Using the context menu, the view can be configured using the configure dialog. The configure dialog enables you to tailor the amount of information the view displays to fit your needs.	Configuration Dialog *Configuration Dialog*

3.14 Milestone Gantt View

3.14.1

3.14.1.1 Description

The Milestone Gantt view is used to show milestones in a time line.

<div align="center">Gantt View</div>

<div align="center">*Gantt View*</div>

3.14.1.2 Editing data

Milestone description and progress can be edited using the context menu.

The following columns are displayed as default:

Column	Description
WBS Code	The Work Breakdown Structure code
Name	The name of the milestone.
Start Time	The scheduled start time.

3.14.1.3 Configuration

Using the context menu, the view can be configured using the configure dialog. The configure dialog enables you to tailor the amount of information the view displays to fit your needs.	Configuration Dialog *Configuration Dialog*

3.15   Resource Assignment Gantt View

3.15.1

3.15.1.1   Description

The Resource Assignment View displays the scheduled task-resource assignments in a table.

NOTE
This view can severely impact performance in large projects.

3.15.1.2   Data

The following columns are displayed as default:

Column	Description
Name	The name of the object (Resource group, resource, task)
Total	The total assignment for a resource
Dates	The total assignments for a resource per day and the assignments for the resource per task.

3.15.1.3   Editing data

The task description and progress can be edited using the context menu.

3.15.1.4   Configuration

Using the context menu, the view can be configured using the configure dialog. The configure dialog enables you to include or exclude assignments.	Configuration Dialog *Configuration Dialog*

3.16   Resource Assignment View

3.16.1

3.16.1.1   Description

The Resource Assignment Gantt View displays the scheduled task-resource assignments in a Gantt chart.

3.16.1.2 Data

The following columns are displayed as default:

Column	Description
Name	The name of the object (Resource group, resource, task)
Type	Object type
Start Time	The start of the assignment
End Time	The end of the assignment

3.16.1.3 Editing data

The task description and progress can be edited using the context menu.

3.16.1.4 Configuration

Using the context menu, the view can be configured using the configure dialog. The configure dialog enables you to select which columns to display.	Configuration Dialog *Configuration Dialog*

Chapter 4

Reports

4.1 Reports Generator View

4.1.1

4.1.1.1 Description

The Reports Generator View is used to add and generate reports in Open Document Text (odt) format.

The reports can be based on the supplied report templates, or you can write your own templates.

Column	Description
Name	A name of your choice
Report Template	Path to the report template file. You can select one of the supplied standard templates or you can enter the filename of a template you provide yourself.
Report File	The name of the file that will be generated.
Add	Information that can be added to the report file name to distinguish it from previously generated versions. This can be: • *Nothing*; use the filename as is • *Number*; add a sequence number to the file name • *Date*; add the current date to the file name

4.1.1.2 Toolbar

The toolbar provides the means to add, remove and generate reports.

Button	Shortcut	Description
Add Report	**Ctrl-I**	Add a new report
Remove Report	**Ctrl-D**	Remove the selected report
Generate Report	**Ctrl-G**	Generate the selected report

Chapter 5

Credits and License

Documentation Copyright see the UserBase Plan page history

This documentation is licensed under the terms of the GNU Free Documentation License.