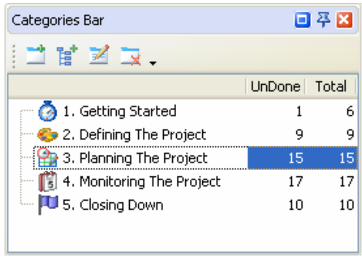
VIP Team To Do List for Project Management

Life is a project, and if we want it to succeed, we should manage it. However, making even a simple project a reality is not a simple thing. Let's manage an agile project from start to finish using VIP Team To Do List.

Step 1. Break the project into stages

Develop a business case, project definition statement and project scope to define the stages your project should consist of. Set the project stages as categories and subcategories.

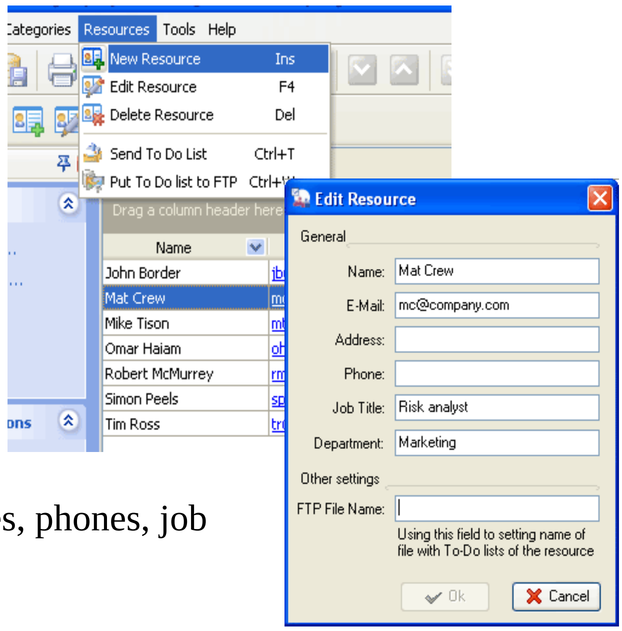
- Create Categories (***Categories -> New Category*** or Click right button of the mouse on ***Category Bar*** and select ***New Category***)
- Create Subcategories (***Categories -> Add Sub Category*** or Click right button of the mouse on ***Category Bar*** and select ***New Sub Category***)



Step 2. Build the project team

The project meets company agenda and key risks are overviewed. It is the high time to think who should be in the project. Make a list of your human resources.

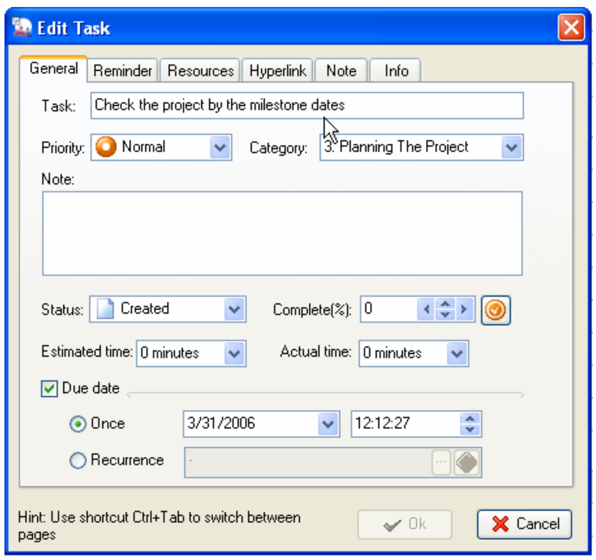
- Go to Resource View (***View -> Resource View*** or TAB ***Resources*** or ***SHIFT +STRL+R***)
- Add human resources to the list (***Resources -> New Resource*** or ***New Resource*** button or ***INS***)
- Fill in human resources' names, emails, addresses, phones, job titles, departments (***Create Resource*** dialog)



Step 3. List the project activities

The success of the project depends greatly on its detailed plan. Break each project stage down into simple tasks or to do items to have the project checklist.

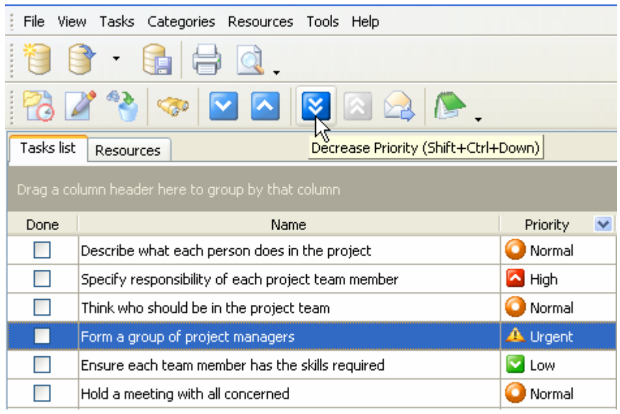
- Set filter on a category or subcategory (double click on category or subcategory in Categories Bar)
- Create tasks (***Tasks -> Create Task*** or ***Create Task*** button ***Ins*** or ***CTRL + ALT + A***)
- Fill in a task name and click OK (***Create Task*** dialog)



Step 4. Prioritize the project activities

According to Pareto Principle 20% of tasks lead to 80% of success, so some of the project 'to do items' are critical, others are not so important. Prioritize the tasks by their significance from low priority to urgent.

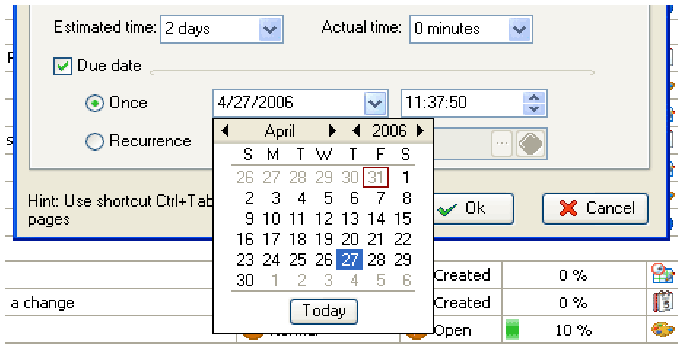
- Change tasks priority (***Tasks -> Increase/Decrease Priority*** or ***Increase/Decrease Priority*** buttons or ***SHIFT + CTRL + UP/DOWN***)

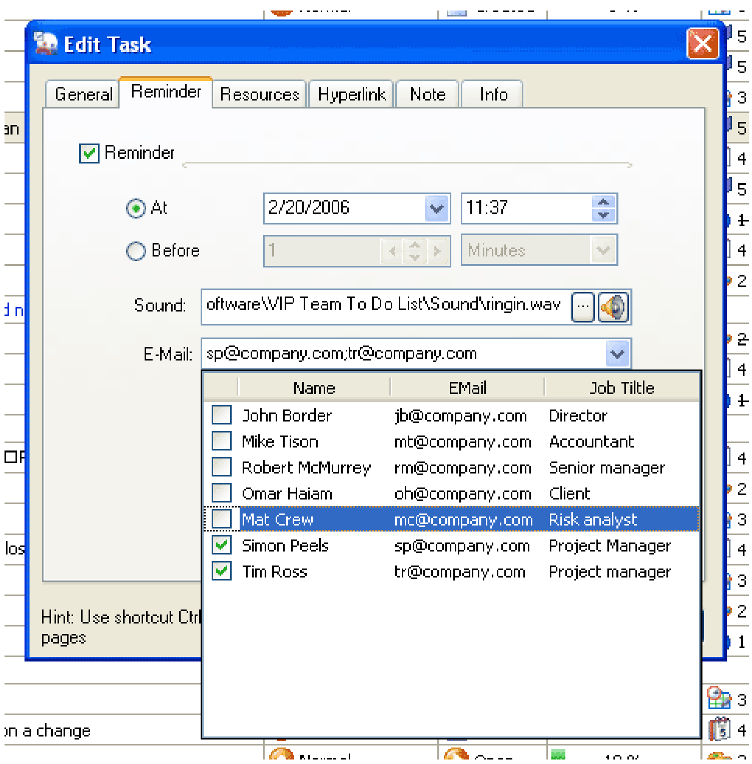


Step 5. Set deadlines for the project activities

Estimating how much time each activity will take requires project management skills and experience. Identify activities that have to be completed by the due date and set realistic deadlines.

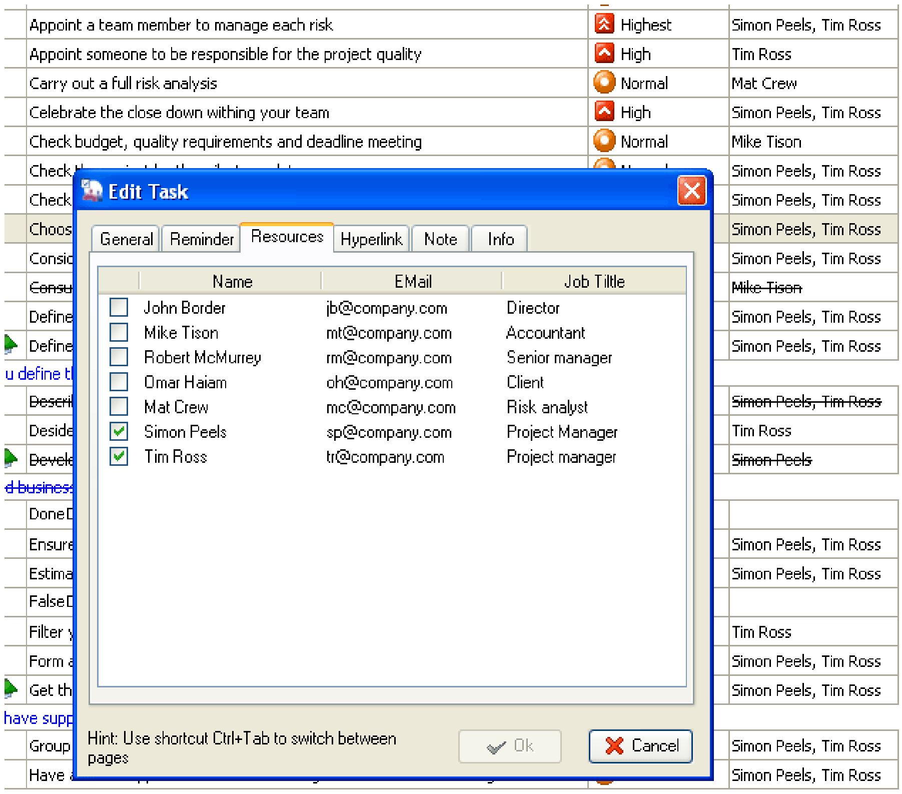
- Open Edit Task dialog (***Double click*** on a task in the Task Grid or ***Edit Task*** button or ***F4*** or click the ***right button*** of the mouse on a task and choose ***Edit Task***)
- Estimate time needed for each task and see total time required (Choose appropriate time period in drop down list or type it in ***Estimated Time*** field)
- Activate Due Date option (***Tick*** in ***Due Date*** checkbox)
- Set Due Date and Time for common non-recurring tasks (radio button ***Once***, drop down ***Calendar*** and ***Time*** field)
- Set Due Date and Time for recurrent tasks (radio button ***Recurrence***, enter ***Time Interval***, ***Start Date***, ***End Date***)
- Set Reminder for milestone dates (***Edit Task -> Reminder***)





Step 6. Appoint team members to the project activities

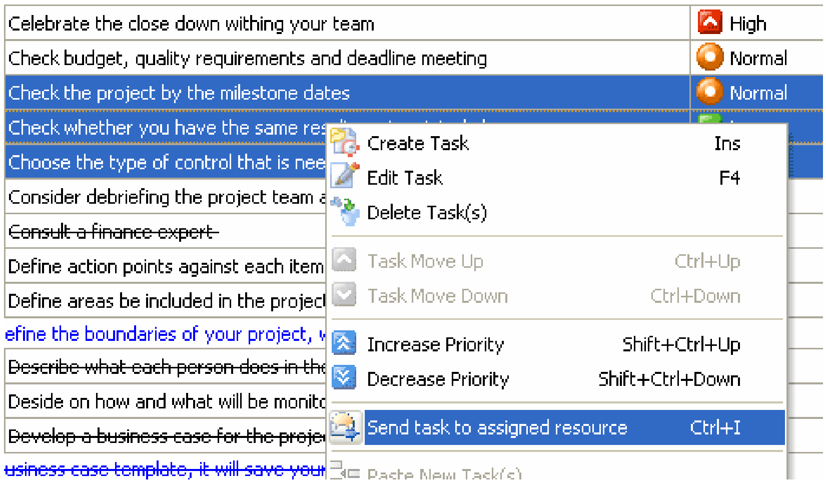
Delegation skills help project managers appoint the right person to a certain task. Having decided who has the right skills to do the task, you will make only one mouse click to assign this team member to it.



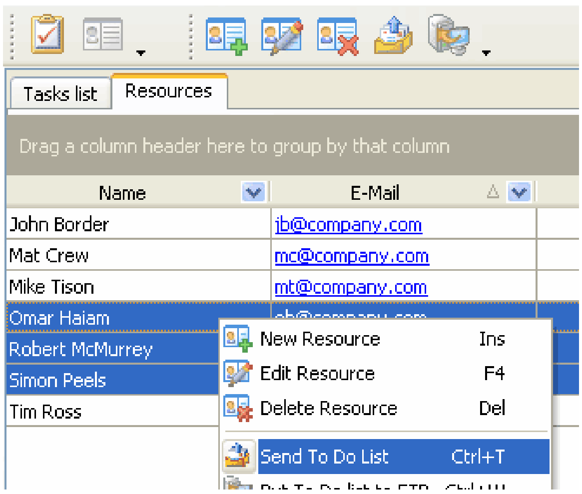
- Assign the project human resources to tasks (***Drag and Drop*** a resource from ***Resource Assignment Bar*** or ***Tick*** appropriate resources in ***Resource TAB*** of ***Edit Task*** dialog)

Step 7. Communicate the project plan

Some of the people engaged in the project work next to you, others support it from the distance. Communicate the project plan to all concerned.

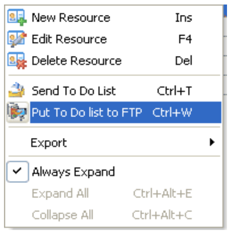


- Print the project to do list (***File -> Print Preview***, ***File -> Print*** or ***Print*** button or ***CTRL + P***)
- Send a separate task to assigned resources (***Tasks -> Send task to assigned resource*** or click the ***right button*** of the mouse on a task and choose ***Send task to assigned resource*** or ***CTRL + I***)
- Send a group of tasks to assigned resources (Select as many tasks on the task grid as you need using ***SHIFT*** or ***CTRL*** and go to ***Tasks -> Send task to assigned resource*** or click the ***right button*** of the mouse on a task and choose ***Send task to assigned resource*** or ***CTRL + I***)

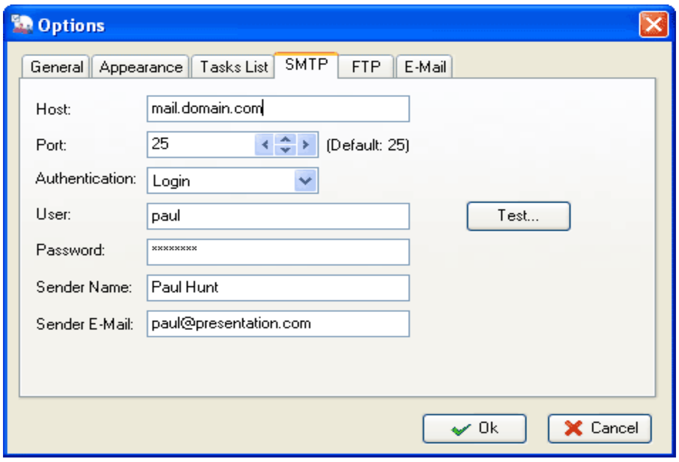


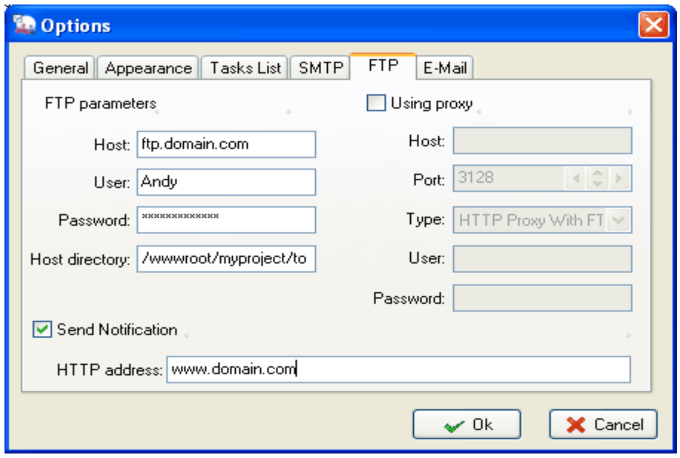
- Send personal to do lists to assigned resources (Choose resource(s) in Resource View or ***Resource Assignment Bar,*** click the ***right button*** of the mouse on the resource(s) and choose ***Send To Do List*** or ***CTRL + T***)

- Publish to do lists on your corporate website (Choose resource(s) in Resource View or ***Resource Assignment Bar,*** click the ***right button*** of the mouse on the resource(s) and choose ***Put To Do List to FTP*** or ***CTRL + W***)



Notes: Don't forget to use SMTP and FTP settings before sending information by email or publishing on Web (***Tools -> Options***)

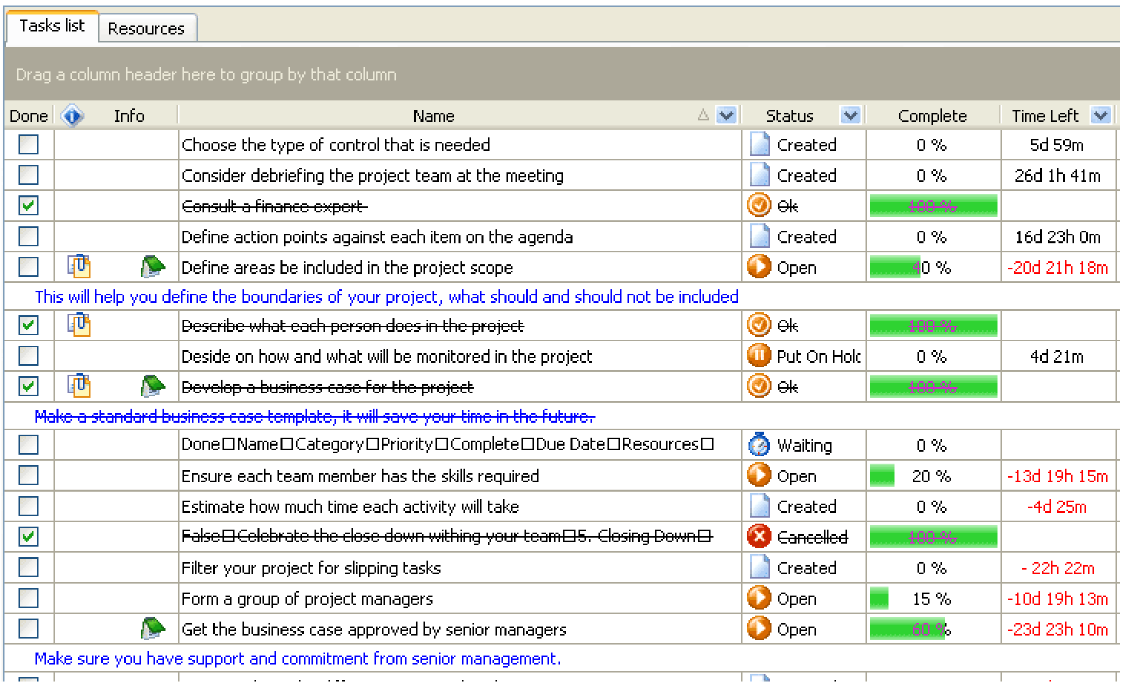




Step 8. Monitor the project

After you agreed monitoring and reviewing project process and issues with senior managers or boss and decided on how and what will be monitored in the project, you can track the project progress.

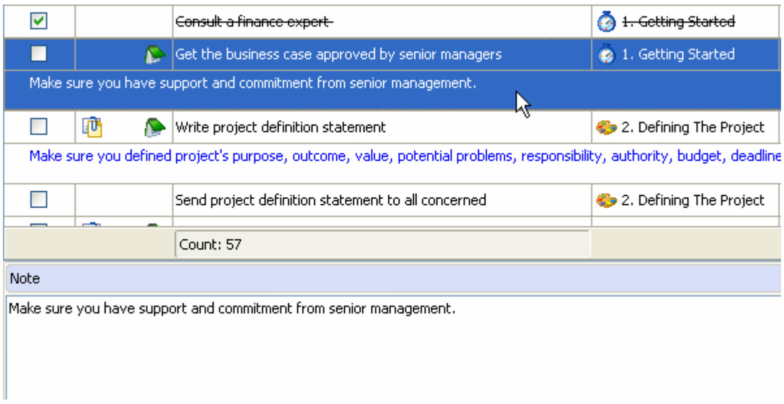
- Change status of tasks to ***'Open'***, ***'Waiting'***, ***'Put On Hold'***, ***'Cancelled'*** or ***'Ok'*** (***Edit Task -> Status***)
- Change percentage of tasks completion (***Edit Task -> Status*** and choose or type exact % number)
- Track the time left till deadline or milestone (***Time Left*** column)



Step 9. Keep records of the project

While monitoring and reviewing project you face some issues or get additional information that should be recorded either as task notes or separate document.

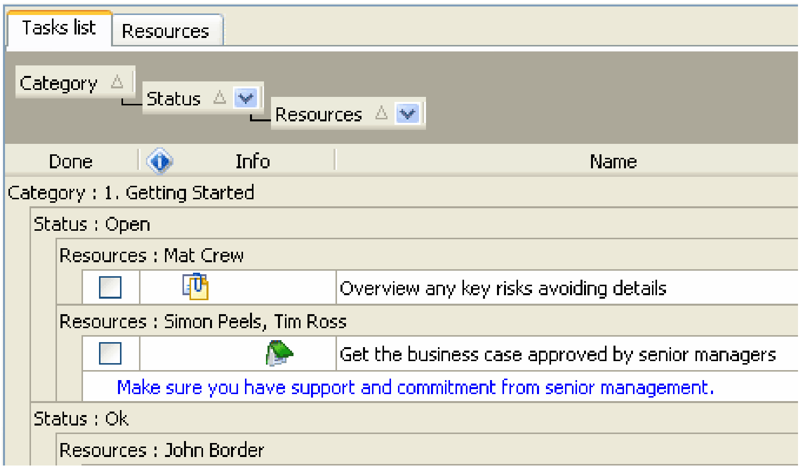
- Use RTF Editor to keep records of project tasks (***Edit Task -> Notes***)
- Use quick access to project documentation (***Edit Task -> Hyperlink***)



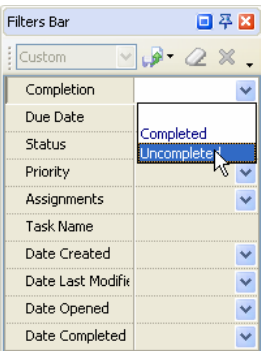
Step 10. Analyze and report the project

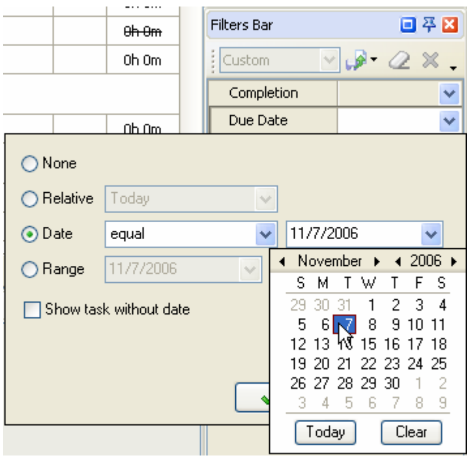
If you want your project to meet deadline with a planned result you should analyze and report project progress at the end of each stage up to closing it down.

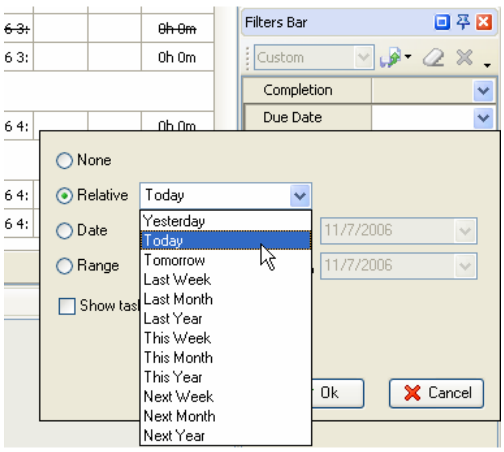
- Sort the tasks the way you need (***Drag and Drop*** any column header on the space above the ***Task Grid***)
- Calculate time spent on a task and compare it with estimated one (***Edit Task -> Actual Time*** field)



- Make a list of all tasks, 'done' tasks or 'undone' tasks (***Filter Bar –> Filter By Done***)
- Filter tasks by categories (***Category Panel ->*** double click on a category)
- Make a list of tasks for a certain date (***Filter Bar -> Due Date***)
- Make a task list for a certain period, ex.: last week or this month (***Filter Bar ->*** time period drop down list)







- Present the report as MS Excel file (***File -> Export -> Export View to Excel***)
- Print out the report (***File ->Print***)