

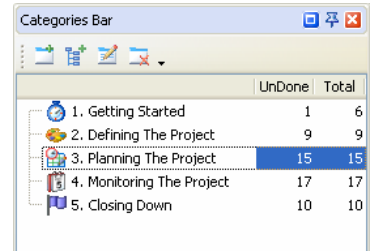
# VIP Team To Do List for Project Management

*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**)

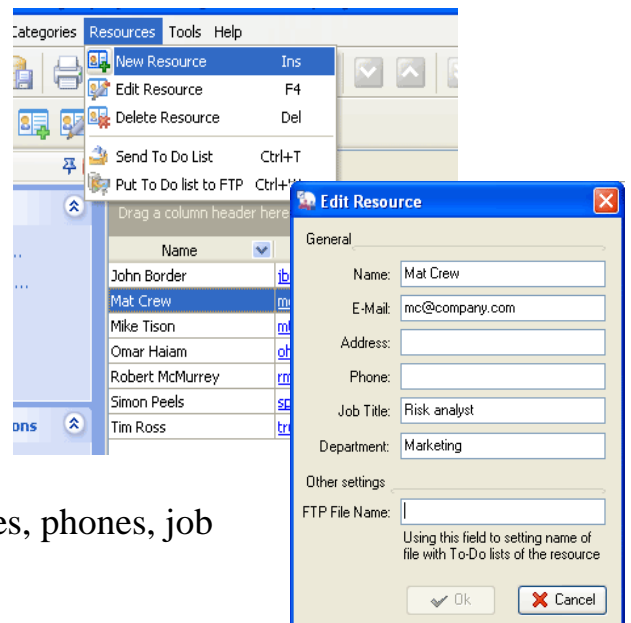


	UnDone	Total
1. Getting Started	1	6
2. Defining The Project	9	9
3. Planning The Project	15	15
4. Monitoring The Project	17	17
5. Closing Down	10	10

## 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)



Categories Resources Tools Help

New Resource Ins  
Edit Resource F4  
Delete Resource Del  
Send To Do List Ctrl+T  
Put To Do list to FTP Ctrl+M

Drag a column header here

Name
John Border
Mat Crew
Mike Tison
Omar Haiam
Robert McMurrey
Simon Peels
Tim Ross

**Edit Resource**

General

Name: Mat Crew  
E-Mail: mc@company.com  
Address:  
Phone:  
Job Title: Risk analyst  
Department: Marketing

Other settings

FTP File Name:

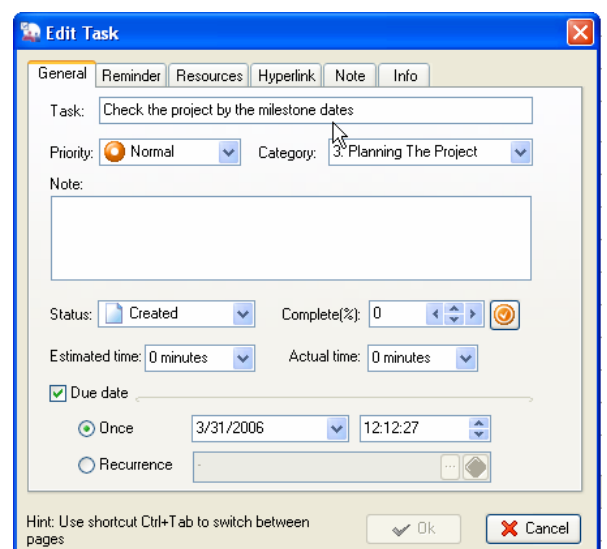
Using this field to setting name of file with To-Do lists of the resource

Ok Cancel

## 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)



**Edit Task**

General Reminder Resources Hyperlink Note Info

Task: Check the project by the milestone dates

Priority: Normal Category: 3: Planning The Project

Note:

Status: Created Complete(%): 0

Estimated time: 0 minutes Actual time: 0 minutes

Due date

Once 3/31/2006 12:12:27

Recurrence

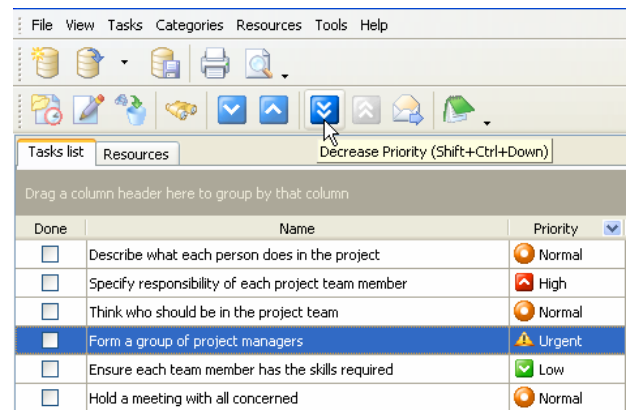
Hint: Use shortcut Ctrl+Tab to switch between pages

Ok Cancel

## 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.

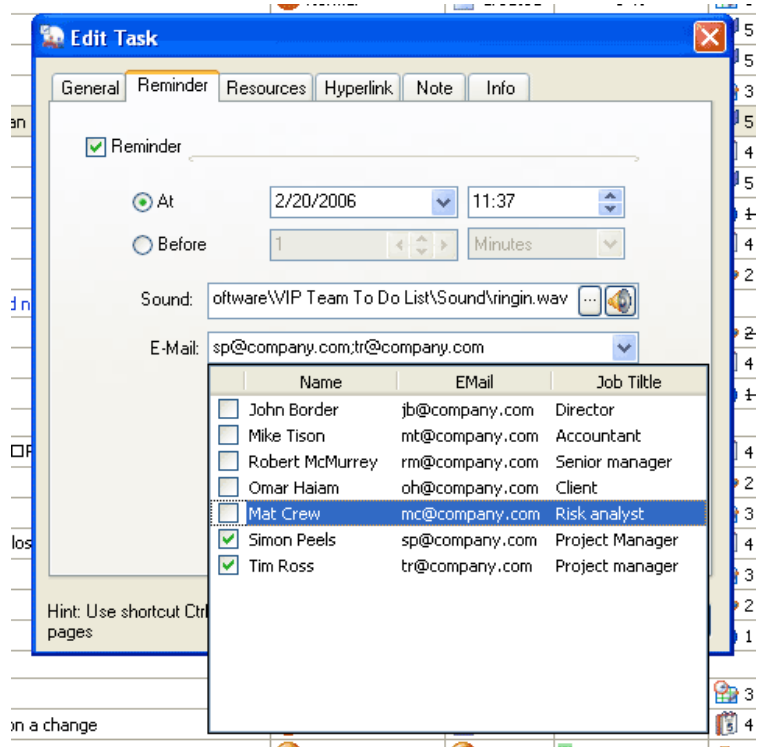
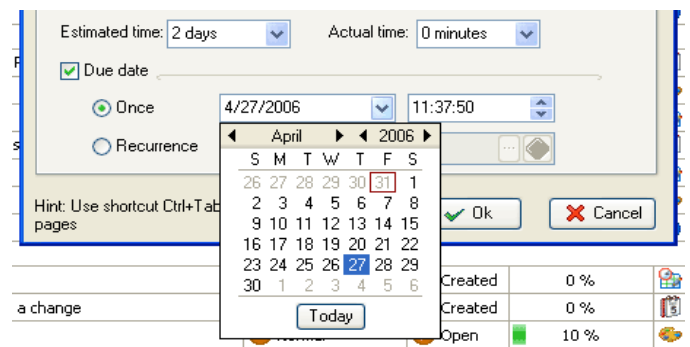
- Change tasks priority (**Tasks -> Increase/Decrease Priority** or **Increase/Decrease Priority** buttons or **SHIFT + CTRL + UP/DOWN**)



## 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)

Name	E-Mail	Job Title
<input type="checkbox"/> John Border	jb@company.com	Director
<input type="checkbox"/> Mike Tison	mt@company.com	Accountant
<input type="checkbox"/> Robert McMurrey	rm@company.com	Senior manager
<input type="checkbox"/> Omar Haiam	oh@company.com	Client
<input type="checkbox"/> Mat Crew	mc@company.com	Risk analyst
<input checked="" type="checkbox"/> Simon Peels	sp@company.com	Project Manager
<input checked="" type="checkbox"/> Tim Ross	tr@company.com	Project manager

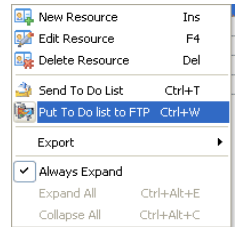
## Step 7. Communicate the project plan

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.

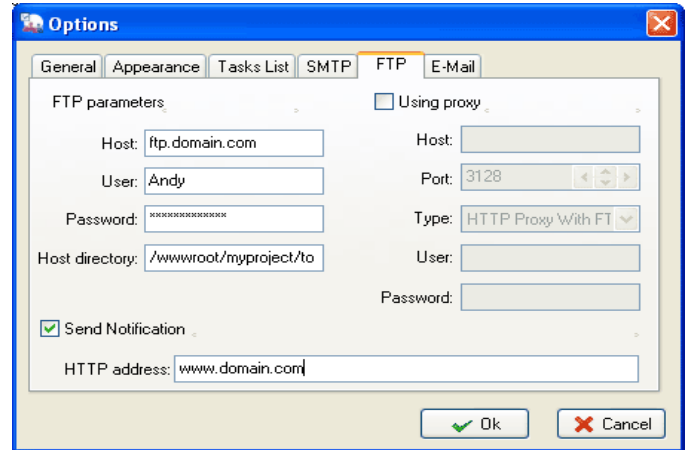
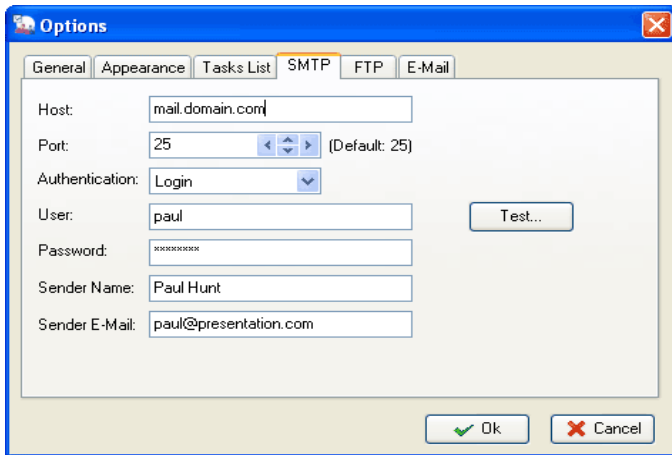
- Print the project to do list (**File -> Print Preview**, **File -> Print** or **Print** button or **CTRL + P**)
- Send a separate task to assigned resources (**Tasks -> Send task to assigned resource** or click the **right button** of the mouse on a task and choose **Send task to assigned resource** 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**)

Name	E-Mail
John Border	jb@company.com
Mat Crew	mc@company.com
Mike Tison	mt@company.com
Omar Haiam	oh@company.com
Robert McMurrey	rm@company.com
Simon Peels	sp@company.com
Tim Ross	tr@company.com

- 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.

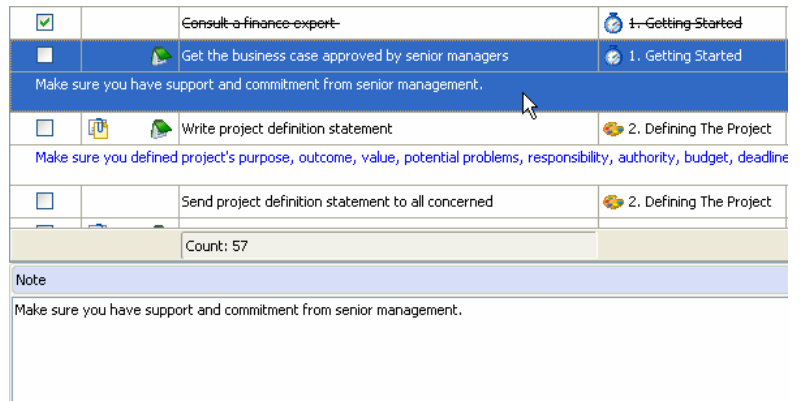
- Change status of tasks to '**Open**', '**Waiting**', '**Put On Hold**', '**Cancelled**' or '**Ok**' (**Edit Task -> Status**)
- Change percentage of tasks completion (**Edit Task -> Status** and choose or type exact % number)
- Track the time left till deadline or milestone (**Time Left** column)

Done	Info	Name	Status	Complete	Time Left
<input type="checkbox"/>		Choose the type of control that is needed	Created	0 %	5d 59m
<input type="checkbox"/>		Consider debriefing the project team at the meeting	Created	0 %	26d 1h 41m
<input checked="" type="checkbox"/>		Consult a finance expert	Ok	100 %	
<input type="checkbox"/>		Define action points against each item on the agenda	Created	0 %	16d 23h 0m
<input type="checkbox"/>		Define areas be included in the project scope	Open	10 %	-20d 21h 18m
This will help you define the boundaries of your project, what should and should not be included					
<input checked="" type="checkbox"/>		Describe what each person does in the project	Ok	100 %	
<input type="checkbox"/>		Decide on how and what will be monitored in the project	Put On Hold	0 %	4d 21m
<input checked="" type="checkbox"/>		Develop a business case for the project	Ok	100 %	
Make a standard business case template, it will save your time in the future.					
<input type="checkbox"/>		Done <input type="checkbox"/> Name <input type="checkbox"/> Category <input type="checkbox"/> Priority <input type="checkbox"/> Complete <input type="checkbox"/> Due Date <input type="checkbox"/> Resources <input type="checkbox"/>	Waiting	0 %	
<input type="checkbox"/>		Ensure each team member has the skills required	Open	20 %	-13d 19h 15m
<input type="checkbox"/>		Estimate how much time each activity will take	Created	0 %	-4d 25m
<input checked="" type="checkbox"/>		False <input type="checkbox"/> Celebrate the close-down withing your team <input type="checkbox"/> Closing-Down <input type="checkbox"/>	Cancelled	100 %	
<input type="checkbox"/>		Filter your project for slipping tasks	Created	0 %	- 22h 22m
<input type="checkbox"/>		Form a group of project managers	Open	15 %	-10d 19h 13m
<input type="checkbox"/>		Get the business case approved by senior managers	Open	10 %	-23d 23h 10m
Make sure you have support and commitment from senior management.					

## 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.

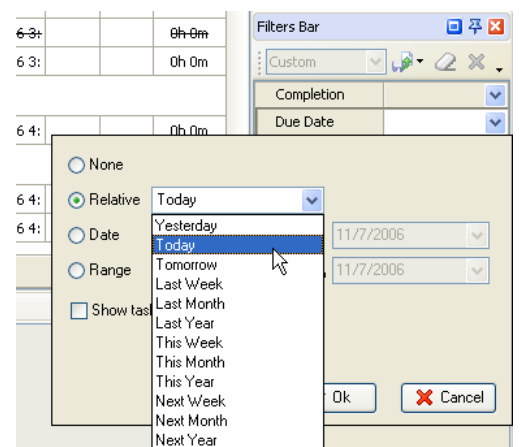
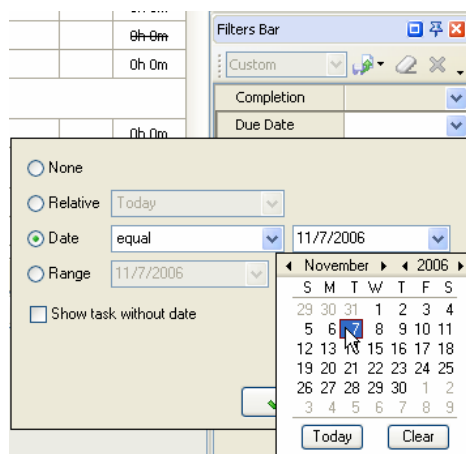
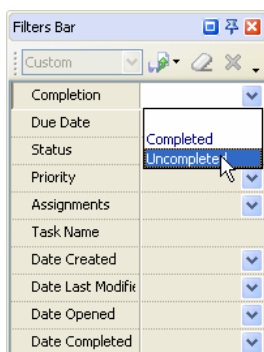
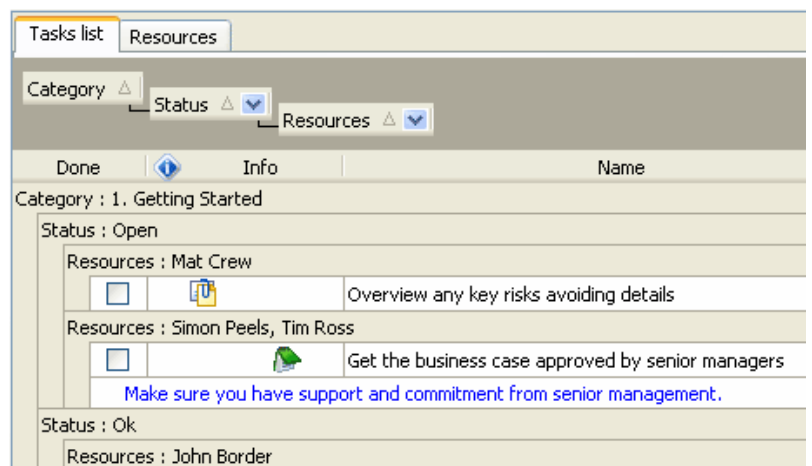
- Use RTF Editor to keep records of project tasks (*Edit Task -> Notes*)
- Use quick access to project documentation (*Edit Task -> Hyperlink*)



## 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*)