



ERNEST ORLANDO LAWRENCE
BERKELEY NATIONAL LABORATORY



INFORMATION TECHNOLOGY
DIVISION

BLI: eRoom Advanced Part 3 Project Plans

Curtis McDonald

Information Technology Division

Project Plan



- **Create new project plan framework**
- **Enter project tasks and milestones**
- **Viewing options**
- **Exercise**
- **Project plan management**
- **Export/import**



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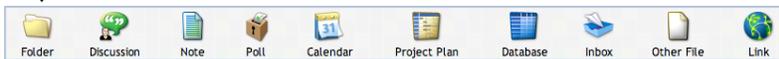
Getting started



- **Login to eRoom**
 - <http://www.lbl.gov/erom>
- **Navigate to the BLI Advanced Class eRoom**
- **Choose create/folder**

Create

What type of item would you like to create?



- **Create a folder named your first name e.g. Sue**



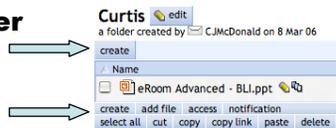
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Project Plan Creation



- **Go into your folder**



- **Choose create**

- **Select project plan**

Create

What type of item would you like to create?



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Project Plan Creation



- **Pick a project name**

Create Project Plan

Pick a name for this project plan.

July Division Review

- **Start date**

Start date 4/1/2006

Weeks begin on Monday

- **Additional description**

Description

Processes to prepare for the July 2006 Division Review

- **Attachments, votes, etc. in overview**

- Include space for comments and votes
- Include box for attachments
- Keep change logs

Progress reports

Enable progress reports if you want to follow the status of tasks: ahead , on time , tardy , or late . (Access Control, below, determines who may file the reports.) Disable progress reports if you merely want to mark tasks "done" when complete.

- **Progress reporting capability**

- Disable progress reports
- Enable progress reports

A report is due for an active task every 7 days

A task changes from tardy to late when it falls behind schedule by 15% or more



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Project Plan Creation



- **Working days**

- **Can choose to include or remove days from work week.**

Working days and holidays

Every project plan follows working days and holidays. Choose which days to use for this project plan. (Caution: changing the days may reschedule existing tasks.)

- Use the default days
- Use custom days unique to "July Division Review"

Default working days

Monday
Tuesday
Wednesday
Thursday
Friday

- **Categories allow you to sort tasks.**

- **Use when there are many tasks**

Default holidays

Date Description
There are no default holidays.

Categories

A category can be assigned to a task like a keyword, permitting you to group tasks arbitrarily.

Categories

Name (delete)
There are no categories.

- **Click add a category**

add a category



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Project Plan Creation



- Enter the category name and choose to add another
 - Continue adding category names until complete
 - Click the OK button to enter last category

July Division Review
Create Category

Name

OK Add Another Cancel

- The categories will all be listed on the project plan creation page

Categories
A category can be assigned to a task like a keyword,

Name	(delete)
Administrative	<input type="checkbox"/>
Financial	<input type="checkbox"/>
Meeting planning	<input type="checkbox"/>

- Click access control button

access control change icon custom commands



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Project Plan Creation



- Select persons with open and edit rights to the project plan framework

July Division Review Access Control

Access Control governs who can open this item and who can edit it. You can list of people.

The people with rights to this item are:

Open

Edit

- Choose to make hidden if needed

This item is:

Read-only (not editable)

Hidden (only shown to members who can open it)

Reserved for editing

- Select who can edit tasks in this project plan

A task created in this project plan can be edited by:

The member who created it

The member who created it and the project plan owners

Everyone who can open the project plan

- Select if a person can file progress reports for their tasks

A member who is assigned as a task resource may file progress reports

- Select ok to complete access rights



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Project Plan Creation



- Click ok on project window to complete the project plan creation
- You will now see an empty project plan

July Division Review edit
 a project plan created by CJMcDonald on 14 Mar 06

new task | all tasks | ungrouped | in weeks | back | next | start chart on 4/1/2006 | go | today

Processes to prepare for the July 2006 Division Review

Task	ID	Dur.	Gantt
All tasks 0	0d		3 Apr 06 10 Apr 06 17 Apr 06 24 Apr 06
Click "new task" to create a task.			

new task | notification | export | import
 select all | cut | copy | copy link | paste | delete | mark read | mark unread

Attachments

create | add file | mark read | commands



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Adding Tasks



- Click the new task button
- Title the task
- ID is sequentially created
- Predecessors if any apply
- Duration in days, not hours
- List earliest start date, if applicable
- Click recalculate to populate the start and finish fields

July Division Review edit
 a project plan created by CJMcDonald on 14

new task | all tasks

Create Task

Title: Collect financial data from this quarter

ID: (set automatically)

Predecessors: [dropdown]

Duration: 1 days (enter 0 for a milestone)

Earliest start: 6/21/2006

recalculate click to see new start and finish

Progress: Progress reports can be filed for this task after you finish creating it.
 Omit duration, progress, and status from summaries

Start: 21 Jun 06

Finish: 21 Jun 06



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Adding Tasks



- **Select a category** → Category
- **Select resources** → Resource
- **Add notes** → Notes
- **Provide a further description** → Description
- **Choose to allow comments, votes and attachments** → Include space for comments and votes
 Include box for attachments
- **Select add another or ok when finished adding tasks** →



Adding Tasks



- **Click the new task button** → July Division Review
a project plan created by C.J.McDonald on 14
- **Title the task** → Create Task
Title
- **ID is sequentially created** → ID
- **Predecessors if any apply** → Predecessors
- **Duration in days, not hours** → Duration days (enter 0 for a milestone)
- **List earliest start date, if applicable** → Earliest start
- **Click recalculate to populate the start and finish fields** → click to see new start and finish
Progress Progress reports can be filed for this task after you finish creating it.
 Omit duration, progress, and status from summaries
Start
Finish



Adding Tasks



- **Select a category** → Category: Meeting planning
- **Select resources** → Resource: Curtis McDonald
- **Add notes** → Notes: [empty text box]
- **Provide a further description** → Description: Book conference room and invite people
- **Choose to allow comments, votes and attachments** → Include space for comments and votes
 Include box for attachments
- **Select add another or ok when finished adding tasks** → OK Add Another Cancel



Adding Tasks



- **Click the new task button** → July Division Review
a project plan created by CJMcDonald on 14
new task [] all tasks
- **Title the task** → Create Task
Title: Schedule catering for meeting
- **ID is sequentially created** → ID: (set automatically)
- **Choose predecessor (task #2)** → Predecessors: []

OK Cancel

Choose Predecessors

Choose the tasks that this task depends on. Tasks that are dependent on this task, directly or indirectly, may not be chosen.

Task	ID	Duration	Start	Finish	Predecessors	Category	Resources	Notes
<input type="checkbox"/> Collect financial data from this quarter	1	1	21 Jun 06	21 Jun 06		Financial	Curtis Test	Examples located in our Division eRoom
<input checked="" type="checkbox"/> Schedule Meeting in calendar	2	1	15 Jun 06	15 Jun 06		Meeting planning	Curtis McDonald	



Adding Tasks



- **Duration in days, not hours** → Duration days (enter 0 for a milestone)
- **Leave earliest start date blank when indicating a predecessor** → Earliest start
- **Click recalculate to populate the start and finish fields** → click to see new start and finish
Progress reports can be filed for this task after you finish creating it.
 Omit duration, progress, and status from summaries
Start
Finish
- **Select a category** → Category
- **Select resources** → Resource



Adding Tasks



- **Add notes** → Notes
- **Provide a further description** → Description
- **Choose to allow comments, votes and attachments** → Include space for comments and votes
 Include box for attachments
- **Select add another or ok when finished adding tasks** →



Viewing the Project Plan



- We now have a project plan showing gantt view

July Division Review [edit](#)
 a project plan created by [Curtis McDonald](#) on 2 Oct 06

new task all tasks ungrouped in weeks [back](#) [next](#) start chart on 4/1/2006 [go](#) [today](#)

Processes to prepare for the July 2006 Division Review

task remaining task done not counted milestone overall duration

Task	ID	Dur.	Gantt
All tasks 3		3d	3 Apr 06 10 Apr 06 17 Apr 06 24 Apr 06
Schedule Meeting in calendar	2	1d	
Schedule catering for meeting	3	1d	
Collect financial data from this quarter	1	1d	

new task notification export import
 select all cut copy copy link paste delete mark read mark unread

Attachments

create add file mark read commands



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Viewing the Project Plan



- Click view details button for detailed view of project

July Division Review [edit](#)
 a project plan created by [Curtis McDonald](#) on 2 Oct 06

all tasks ungrouped

Processes to prepare for the July 2006 Division Review

Task	ID	Dur.	Status	Latest Report	Actual/Plan	Start	Finish	Pre.	Category	Resources	Notes
All tasks 3		3d	100% behind		0d of 3d	15 Jun 06	21 Jun 06				
Schedule Meeting in calendar	2	1d	100% behind	none	0d of 1d	15 Jun 06	15 Jun 06		Meeting planning	Curtis McDonald	
Schedule catering for meeting	3	1d	100% behind	none	0d of 1d	16 Jun 06	16 Jun 06	2	Meeting planning	Curtis McDonald	Coffee, cookies, etc.
Collect financial data from this quarter	1	1d	100% behind	none	0d of 1d	21 Jun 06	21 Jun 06		Financial	Curtis Test	Examples located in our Division eRoom

new task notification export import
 select all cut copy copy link paste delete mark read mark unread



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Viewing the Project Plan



- **Return to gantt view**
- **Select option to view**
 - **All tasks**
 - **All unfinished tasks**
 - **My tasks**
 - **My unfinished tasks**
- **Return to viewing all tasks**

July Division Review [edit](#)
a project plan created by Curtis McDonald on 2 Oct 06

new task all tasks ungrouped

July Division Review [edit](#)
a project plan created by Curtis McDonald on 2 Oct 06

new task **all tasks** ungrouped

Processes to prepare for the July 2006 Division Review

- all unfinished tasks
- my tasks
- my unfinished tasks

task remaining task done not counted milestone overall

Task	ID	Dur.	Gant
My unfinished tasks 2		2d	
Schedule Meeting in calendar	2	1d	
Schedule catering for meeting	3	1d	

new task notification export import
select all cut copy copy link paste delete mark read mark un



Viewing the Project Plan



- **Select grouping to view**
 - **Ungrouped**
 - **By resource**
 - **By category**

July Division Review [edit](#)
a project plan created by Curtis McDonald on 2 Oct 06

new task ungrouped by resource by category

Processes to prepare for the July 2006 Division Review

task remaining task done not counted milestone duration

Task	ID	Dur.	Gant
All tasks 3		3d	
Curtis McDonald 2		2d	
Schedule Meeting in calendar	2	1d	
Schedule catering for meeting	3	1d	
Curtis Test 1		1d	
Collect financial data from this quarter	1	1d	

new task notification export import

task remaining task done not counted milestone duration

Task	ID	Dur.	Gant
All tasks 3		3d	
Financial 1		1d	
Collect financial data from this quarter	1	1d	
Meeting planning 2		2d	
Schedule Meeting in calendar	2	1d	
Schedule catering for meeting	3	1d	

new task notification export import
select all cut copy copy link paste delete mark read mark un



Viewing the Project Plan



- **Select date range to view**
 - **In weeks**
 - **In months**
 - **In quarters**



July Division Review [edit](#)
a project plan created by Curtis McDonald on 2 Oct 06

new task | all tasks | ungrouped | in quarters | back | next | start chart on 3/1/2006 | go | today

Processes to prepare for the July 2006 Division Review

Task	ID	Dur.	Gantt		
All tasks 3		3d	1 Apr 06	1 Jul 06	1 Oct 06
Schedule Meeting in calendar	2	1d			
Schedule catering for meeting	3	1d			
Collect financial data from this quarter	1	1d			

task remaining | task done | not counted | milestone | overall duration

new task | notification | export | import | select all | cut | copy | copy link | paste | delete | mark read | mark unread

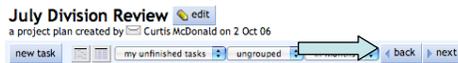


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Viewing the Project Plan



- **Move chart forward and backward in weeks, months, or quarters**



July Division Review [edit](#)
a project plan created by Curtis McDonald on 2 Oct 06

new task | all tasks | ungrouped | in quarters | back | next | start chart on 6/1/2006 | go | today

Processes to prepare for the July 2006 Division Review

Task	ID	Dur.	Gantt		
All tasks 3		3d	1 Jul 06	1 Oct 06	1 Jan 07
Schedule Meeting in calendar	2	1d			
Schedule catering for meeting	3	1d			
Collect financial data from this quarter	1	1d			

task remaining | task done | not counted | milestone | overall duration

new task | notification | export | import | select all | cut | copy | copy link | paste | delete | mark read | mark unread

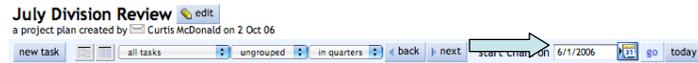


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Viewing the Project Plan



- **Select a different beginning date for view**



- **Or, select today.**

July Division Review edit
a project plan created by Curtis McDonald on 2 Oct 06

new task all tasks ungrouped in quarters back next start chart on 10/2/2006 go today

Processes to prepare for the July 2006 Division Review

task remaining	task done	not counted	milestone	overall duration	ID	Dur.	Gantt
All tasks 3							3d
					2	1d	1 Jan 07
					3	1d	1 Apr 07
					1	1d	1 Jul 07

new task notification export import
select all cut copy copy link paste delete mark read mark unread



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Exercise #1 Project Plan



Inside your folder create a new project plan using the following information:

1. **Name: PRD Process**
2. **Use all defaults unless noted below**
3. **Start date: tomorrow**
4. **Include attachments**
5. **Keep a change log**
6. **Create categories**
 1. **Preparation**
 2. **Training**
 3. **Supervisor Form Completion**
 4. **Review**



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Exercise #1 Project Plan



Add the following tasks:

Title Create PRD form
Predecessors n/a
Duration 3
Earliest start Oct 1, 2006
Category Preparation
Resource you

Title Insert PRD forms into eRoom
Predecessors 'Create PRD form'
Duration 10
Earliest start n/a
Category Preparation
Resource you



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Exercise #1 Project Plan



Add the following tasks:

Title Create training plan
Predecessors n/a
Duration 8
Earliest start Nov 1, 2006
Category Training
Resource you & Curtis Test

Title Train staff
Predecessors 'Create training plan'
Duration 5
Earliest start n/a
Category Training
Resource Curtis Test



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Exercise #1 Project Plan



Add the following tasks:

Title	Create PRDs for employees
Predecessors	'Insert PRD forms into eRoom' & 'Train staff'
Duration	20
Earliest start	n/a
Category	Supervisor Form Completion
Resource	Everyone



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Exercise #1 Project Plan



Add the following tasks:

Title	Supervisor review of PRDs
Predecessors	'Create PRDs for employees'
Duration	10
Earliest start	n/a
Category	Review
Resource	pick two people

In gantt chart view, select the following view options

- **In months**
- **Starting today**

Try the various viewing and grouping options to display different views of your gantt chart



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Project Plan Management

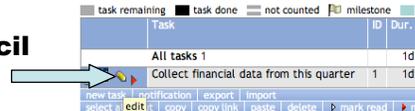


- After a plan has been created you may need to modify it

- To add a new task, simply follow procedure on previous slides

- To edit a task click the pencil next to the name

- Modify any items
 - ~ Start date
 - ~ Duration
 - ~ Owner
 - ~ Etc.



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Project Plan Management



- As a task owner you will need to provide progress reports

- Daily email notifications are provided for the owner of tasks when they are

- Upcoming (< week)
- In progress
- Tasks behind schedule
- Progress report behind schedule

Overdue			
task	project plan	days overdue	
Server Upgrade: Review upgrade documentation	Upgrade Plan	4	

Overdue Progress Reports			
task	project plan	days overdue	
Server Upgrade: Test upgrade process	Upgrade Plan		

Upcoming Project Tasks			
task	project plan	start date	
Order and obtain 2 Linux web servers	Upgrade Plan	2 Oct 06	



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Project Plan Management



- To provide progress reports
 - Click link in email to go directly to report
 - Click tasks entry in project plan

Task	ID	Dur.
All tasks 1		1d
Collect financial data from this quarter	1	1d

- Click link for progress field

summary	
Title	Collect financial data from this quarter
ID	1
Predecessors	
Duration	1 day(s)
Earliest start	21 Jun 06
Progress	0% done (0 day done, 1 day remaining)
Latest report	None
Status	<input type="checkbox"/> not started
Omit from summaries	no
Start	21 Jun 06
Finish	21 Jun 06
Category	Financial
Resource	Curtis Test
Notes	Examples located in our Division eRoom
Description	Collect monthly data for this quarter



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Project Plan Task Management



- Enter status data
 - % done OR days done OR days left
 - Comment to reflect task status

Collect financial data from this quarter

Report Progress

Enter progress as of today. You can enter progress as a percentage of the task's duration, or as days done, or as days remaining.

New report		% Done		Days done		Days left		Comment	Current duration	Current start	Current finish
Date	Status	actual	plan	actual	plan	actual	plan				
today	<input checked="" type="checkbox"/> 100% (0.1d) ahead	10	% 0%	0.1	d 0d	0.9	d 1d	started task	1	21 Jun 06	21 Jun

Progress reporting history

There are no progress reports for this task.

- Progress report history cannot be modified or removed
- Anyone with viewing rights to the project plan can view the progress reports

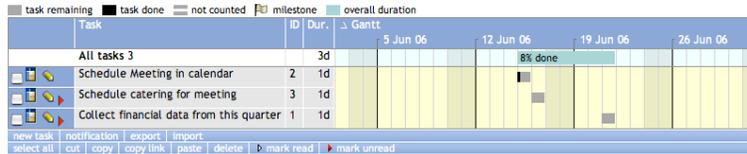


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Project Plan Task Management



- Status can be viewed in gantt or detailed chart



Task	ID	Dur.	Status	Latest Report	Actual/Plan	Start	Finish	Pre.	Category	Resources	Notes
All tasks 3		3d	92% behind	2 Oct 06 to 2 Oct 06	0.25d of 3d	15 Jun 06	21 Jun 06				
Schedule Meeting in calendar	2	1d	75% behind	2 Oct 06	0.25d of 1d	15 Jun 06	15 Jun 06		Meeting planning	Curtis McDonald	
Schedule catering for meeting	3	1d	100% behind	none	0d of 1d	16 Jun 06	16 Jun 06	2	Meeting planning	Curtis McDonald	Coffee, cookies, etc.
Collect financial data from this quarter	1	1d	100% behind	none	0d of 1d	21 Jun 06	21 Jun 06		Financial	Curtis Test	Examples located in our Division eRoom

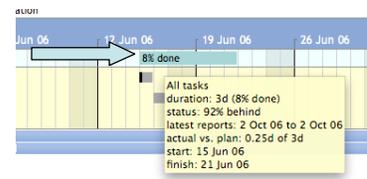
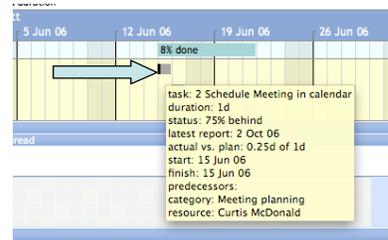


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Project Plan Task Management



- Hovering over the status bar in the gantt view reveals details without having to open the task
- Single tasks details
- Overall project status details



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Importing and Exporting Data



- If adding multiple tasks consider using the import function to save time
- Begin by creating your project plan
- Create a few tasks using gui and selecting various days, resources, and categories to get an example of layout
- Choose to export initial data

Task	ID	Dur.
All tasks 3		3d
Schedule Meeting in calendar	2	1d
Schedule catering for meeting	3	1d
Collect financial data from this quarter	1	1d



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Importing and Exporting Data



- Select ok with default settings
- Right click on file link and choose to download file

IE

Mozilla

**Safari
(ctrl + click)**



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Importing and Exporting Data



- **Open exported file in excel**

Task Name	ID	Duration	Start Date	Constraint Date	Constraint Type	Predecessors	Finish Date	Category	Percent
Schedule Meeting in calendar	2	1	6/15/06	6/15/06	Start No Earlier Than		6/15/06	Meeting planning	
Schedule catering for meeting	3	1	6/16/06	NA	As Soon As Possible	2	6/16/06	Meeting planning	
Collect financial data from this quarter	4	1	6/21/06	6/21/06	Start No Earlier Than		6/21/06	Financial	

- **Use first entries as a template to create new ones.**
- **Pay close attention to format of names, dates, etc.**
- **ID numbers will be auto created**
- **Tasks with predecessors will not need earliest start dates**



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Importing and Exporting Data



- **When finished adding new data**
 - **Leave first line '1'**
 - **Remove tasks that already exist in database 'lines 2 - 4 in this example'**
- **Return to project plan and select import**
- **Browse for file**

Task	ID	Dur.
All tasks 3		3d
Schedule Meeting in calendar	2	1d
Schedule catering for meeting	3	1d
Collect financial data from this quarter	1	1d

- **Confirm the number of fields to be imported**

3 rows of data will be imported into 12 fields (Task_Name, Duration, Constraint_Date, Constraint_Type, Predecessors, Category, Percent_Complete, Omit from summaries, Resource_Names, Notes, Description). If that doesn't sound right, click Cancel and check your import file.



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Resources for information



- <http://www.lbl.gov/ITSD/CIS/citg/eroom/>
 - eRoom overview
- <https://eroom2.lbl.gov/eRoomHelp/en/eRoom-7.htm#index.htm>
 - eRoom help page
 - Select  in top right corner of any eRoom page
- Custom eRoom training & consulting from lab eRoom expert.



Questions?

