



click2try[™]

dotProject

quick start

Introduction

Stardate 29178.1

We've set a course for **Termon 7** in the M83 Galaxy. Our mission: to build a Termonium Sports Stadium and Convention Center out of local materials. We've assembled a team of specialists who are working onboard to draw up plans and cost estimates during our three month journey. Included on the team is a Cultural Attache from Termon 7, **Grzyk Wilmnrytz**, who will help us understand the cultural sensitivities of the Termonium population.

A planet rich in natural resources, Termon 7 is still a bit of a cultural backwater and the **Galactic Organization of Resource Planning (GORP)** has turned its full attention to building the economy of M83 to stimulate more emigration to the Outer Provinces. Termon 7 is a central location in the galaxy, providing an optimum location for all citizens of the M83 Galaxy.



Our Destination, M83 Galaxy

Despite the Termonians' odd language (only one vowel, y) and love of drink and fighting, it seems like a viable objective.

Your Mission

I'm happy you've decided to join us. Your business and planning skills will come in handy! Although I'm responsible for pulling together a multi-galactic team, I need your help setting up the project, drawing up plans, securing agreement from the team and from the Termon 7 local government, and establishing rules for concession licensing, developing marketing plans, and team expansion rules.

(Just between you and me, I'm hoping to save the concession for Zrrgt, a potent local beverage, for myself, but that's another story.)

Within the next hour, we'll need to craft a basic project plan. Because we're operating across galactic borders, and employing intergalactic team members, I've decided to use the Open Source project management software, *dotProject*. Fortunately, *dotProject* is freely available to all of our team members, as well as to other planning groups across the universe.

Today, I'm going to show you how to get a basic project up and running, so you can get familiar with the *dotProject* interface. After that you can begin to focus on brainstorming and entering the initial requirements for the Termonium project.

In the next few lessons, we're going to walk through the process of creating a simple project in *dotProject*. You can easily plan and manage even bigger, more complex projects like the Termonium Project with *dotProject*—it's simply a matter of adding more details, more resources, and more tasks to the plan. To get you up-and-running, we're going to walk through the following tasks:

- Defining a Company
- Defining Contacts
- Defining a Project
- Defining Tasks
- Defining Task Dependencies
- Defining Events
- Configuring a Forum
- Viewing Your Project

Special Note: You can work through each of these tasks in any order you like, but in this case, we've ordered the tasks in a typical project planning sequence to make things more logical.

Let's get started!

If you haven't already signed into the click2try™ Simulation Module for *dotProject*, click the *dotProject* icon now. When the Module is running, you'll see something like this:

The screenshot shows the dotProject 2.1.1 web interface. At the top, there's a navigation menu with options like Companies, Projects, Tasks, Calendar, Files, Contacts, Forums, Tickets, User Admin, and System Admin. Below the menu, it says 'Welcome Admin Person' and 'Help | My Info | Todo | Today | Logout'. The main content area is titled 'Day View' and shows the date 'Thursday, 12/06/2008'. There are tabs for 'Events' and 'Tasks'. The 'Tasks' tab is active, showing a list of tasks with columns for Pin, Progress, P, Task/Project, Start Date, Duration, Finish Date, and Due In. The tasks are as follows:

Pin	Progress	P	Task / Project	Start Date	Duration	Finish Date	Due In
📌	Log 0%		Interface1	12/06/2008 08:00	1 hours	12/06/2008 08:15	0
📌	Log 20%		Não há dinheiro para a luz	12/06/2008 08:00	8 hours	12/06/2008 16:00	0
📌	Log 5%		9685r5	13/06/2008 08:00	1 hours	13/06/2008 09:00	1
📌	Log 60%	↑	Stesura macro progetto	02/06/2008 08:00	5 days	13/06/2008 17:00	1
📌	Log 0%		Feasibility	12/06/2008 08:00	4 hours	13/06/2008 17:00	1
📌	Log 0%		mhwaaahhh....	13/06/2008 08:00	1 hours	13/06/2008 17:00	1
📌	Log 0%		Masterplan	12/06/2008 09:00	16 hours	13/06/2008 17:00	1
📌	Log 10%		001023	13/06/2008 08:00	1 hours	13/06/2008 17:00	1
📌	Log 0%		235235	13/06/2008 08:00	1 hours	14/06/2008 17:00	2
📌	Log 0%		Subvert governments	16/06/2008 08:00	5 days	20/06/2008 16:00	8
📌	Log 0%		test scripts	12/06/2008 08:00	10 days	25/06/2008 16:00	13

Defining a Company

Goal: Define the company

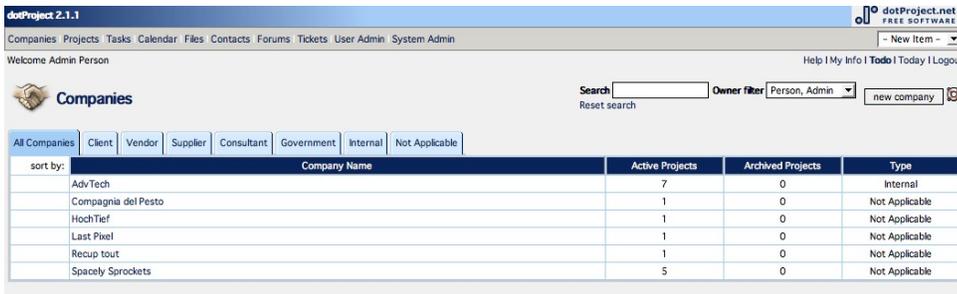
Time: < 2 minutes

If you'll always be defining projects for the same company, then you may only need to perform this task once. If you're an independent project manager, you might want to define multiple companies, so you can keep projects for each client separate.

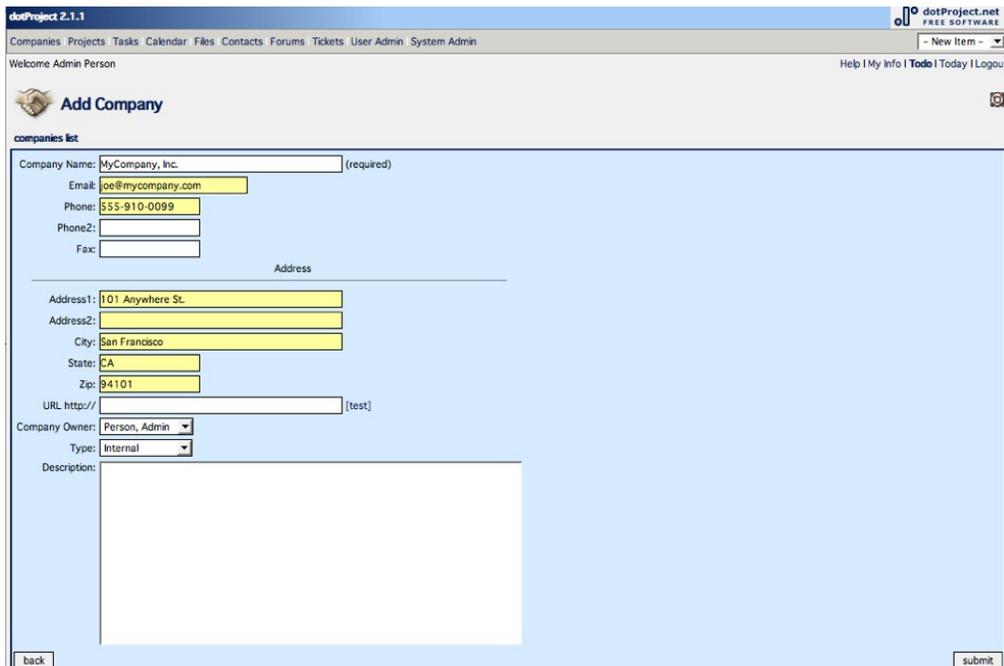
You can also define different companies based on particular roles. For example, you might want to define consulting companies, suppliers, or customers who may be helping you by subcontracting, providing raw materials, or performing beta testing. After you've defined these companies in *dotProject* you can assign them to any projects they're involved in.

To define a company:

1. Click the **Companies** button in the main menu.
2. Click the **New Company** button in the upper right corner, as shown below.



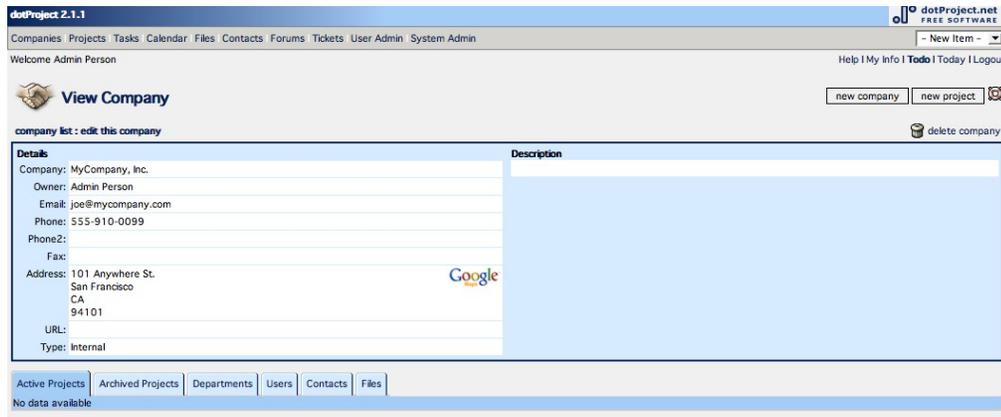
3. Add the company details. In this case, we'll be adding GORP, for the Galactic Organization for Resource Planning as our company.



4. Select the company type from the **Type** drop-down menu. For your own company, choose *Internal*. For other companies, you can choose from:

- Client
- Vendor
- Supplier
- Consultant
- Government
- Internal

5. Click the **Submit** button. You'll be able to view the company you just defined.



That's all there is to it! You've now created a company in *dotProject*.

Defining Contacts

Goal: Define the contacts

Time: <2 minutes

The next thing we'll do is define a contact or two. At the very least, you should define yourself in the system, so you can assign yourself to the project and tasks later. By defining project stakeholders as contacts, you'll be able to use *dotProject's* collaboration and alert tools to let people know when their tasks are due, when you reach milestones, and when they're invited to team events.

To define contacts:

1. Click the **Contacts** button in the main menu.
2. On the **Contacts** page, click the **New Contact** button in the upper-right corner.
3. Enter your contact information.
4. When finished, click the **Submit** button.

Defining a Project

Goal: Define the project

Time: <5 minutes

A project is what it's all about. In our case, our Termonium Project is a complex animal and we really need to document everything we can about the project. Imagine the project like a big container, within

which you define and manage dozens, hundreds, or even thousands of elements, such as tasks, resources, events, obstacles, milestones, and more!

To define a project:

1. Click the **Projects** button in the main menu. A page of projects appears. In your case, you won't see any projects at all, because you haven't defined any yet!
2. Click the **New Project** button in the upper-right corner.
3. Give your project a name, for example, *Termonium Project*.
4. Assign yourself to the project, by selecting your name from the **Project Owner** drop-down menu.
5. Pick your company from the **Company** drop-down menu.
6. By default, the **Start Date** is set to today's date, but go ahead and change it if you know your project will start on another date.
7. Enter the **Target Finish Date**. This is the date that your project is due. As you begin to add tasks and task dates, *dotProject* will start calculating the elapsed days to let you know when you are within the schedule or when a task pushes your project beyond the schedule.
8. For everything else, we'll go with the default values, so go ahead and click the **Submit** button.

That's it. You've created your first project!

Defining Tasks

Goal: Define tasks

Time: <1 minute

Tasks are the building blocks of any project. Even the smallest project consists of dozens, if not hundreds of tasks. Often, when we're working alone, we roll many tasks into one. The power of a good project management tool is that you can perform a Work Breakdown Structure (WBS), carving the project into small tasks that you can assign to yourself and others. With a team working on many tasks at the same time, you can make faster progress.

To define tasks:

1. Click the **New Task** button in the upper-right corner.
2. On the **Add Task** page, enter *Define Plan* in the **Task Name** field.
3. Click the **Dates** tab. You need to enter a **Finish Date** for the task, but the great thing about *dotProject* is that you can enter the amount of time you think it will take to complete the task and *dotProject* calculates the date for you.
4. In the **Expected Duration** field, enter 3, then select *Days* from the drop-down menu next to it.
5. Click the **Calculate: Finish Date** button and *dotProject* fills in the **Finish Date** field.
6. Click the **Save** button.
7. Repeat this process for however many tasks you want to define.

Defining Task Dependencies

Goal: Define dependencies

Time: <5 minutes

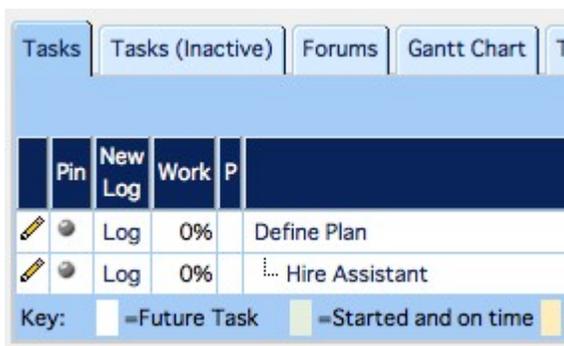
Many tasks are dependent on other tasks. There are two main reasons for this: one is that you can't perform certain tasks until you or somebody else has completed other tasks. For example, if you're painting a wall, you'll need to buy the paint before you can paint the wall. Another reason is that you often assign someone to two tasks and that person can't perform one task until completing other assigned tasks. For both these reasons, it's critically important to link dependent tasks together, to let you see just how a change in one task impacts a dependent task AND the entire project.

For this procedure, you'll define another task and make it dependent on your first task. If you've already defined more than one task, you can set the dependency on one of your existing tasks.

To define task dependencies:

1. Define a second task, following the procedure described in the **Defining Basic Project Tasks** section.
2. In the **Details** tab, select one of your other tasks from the **Task Parent** drop-down list. For example, select *Define Plan*.
3. Click the **Dates** tab.
4. Enter 5 in the **Expected Duration** field.
5. Choose *Days* from the drop-down menu.
6. Click the **Calculate: Finish Date** button. *dotProject* automatically calculates the finish date for your second task, and also makes sure that it doesn't start until the finish date of the parent task you defined.
7. Click the **Dependencies** tab.
8. Select your parent task in the **All Tasks** field, then click the > button to move the task to the **Task Dependencies** field.
9. Select the **Set task start date based on dependency** check box.
10. Under **Dependency Tracking**, click the **On** button.
11. Click **Save**.

You've now defined a dependency between two tasks and instructed *dotProject* to start your second task **after** you complete your first task. *dotProject* indicates this relationship by showing a dotted line between the parent and child tasks:



Defining Events

Goal: Define an event

Time: <5 minutes

Every project has certain associated events: meetings, presentations, customer visits, celebrations, and more. It's important to capture these events, especially those you know in advance, because events not only require planning, but they take time away from other tasks in your project. Also, you often need to notify people who are not explicit team members about these events.

To define an event:

1. On the **Project** page for your project, click the **New Event** button. This displays the **Add Event** page.
2. Enter the name of your event in the **Event Title** field.
3. Choose the type of event from the **Type** drop-down menu.
4. Enter the date of the event.
5. Select the names of attendees in the **Resources** field (hold the Ctrl key to select only the individual names you want to include), then click the > button to move the names to the **Invited to Event** field.
6. Add a description in the **Description** field.
7. Select the **Times**, including the start time and the end time of the event.
8. Select the **Mail Attendees?** check box to email invitations that include the description you supplied.
9. Click **Submit**.

Configuring a Forum

Goal: Configure a project forum

Time: <5 minutes

Team members need to communicate about all kinds of things: dependent tasks, events, resource constraints, obstacles, and many more topics. *dotProject* provides a built-in forum system that you can configure in a matter of minutes. The forum is considered part of the project, so it should be easy for you or anybody you assign to be a Moderator to keep the message threads on-topic!

To configure your forum:

1. Click the **Forums** button in the main menu. This displays a list of forums.
2. Click the **New Forum** button in the upper-right corner.
3. Enter the name of your forum in the **Forum Name** field.
4. Choose a project from the **Related Project** drop-down list. Choose *Termonium Project*.
5. Select the owner and the moderator. These can be the same person.
6. Enter a description in the **Description** field, if you want.
7. Click the **Submit** button.
8. Go back to your **Project** page and click the **Forum** tab at the bottom of the page. You'll see your forum listed.

Additional Resources

Looks like you've made good progress in learning more about *dotProject*. Like almost all Open Source software, *dotProject* is supported by a strong user community and volunteer developers, project managers, and other dedicated team members. The following resources have passed our Intergalactic Seal of Approval:

[Main dotProject Development Site](http://www.dotproject.net) (<http://www.dotproject.net>)

[dotProject Demo Site](http://www.dotproject.net/demo/) (<http://www.dotproject.net/demo/>)

[dotProject Tutorials](http://training.dotproject.net/) (<http://training.dotproject.net/>)