

The secret weapon for teams that need easy, professional
online project management in just minutes a day

 **LiquidPlanner™**

Polishing Your LiquidPlanner 3.0 Workspace



LP3 Transition Guide

June 2011

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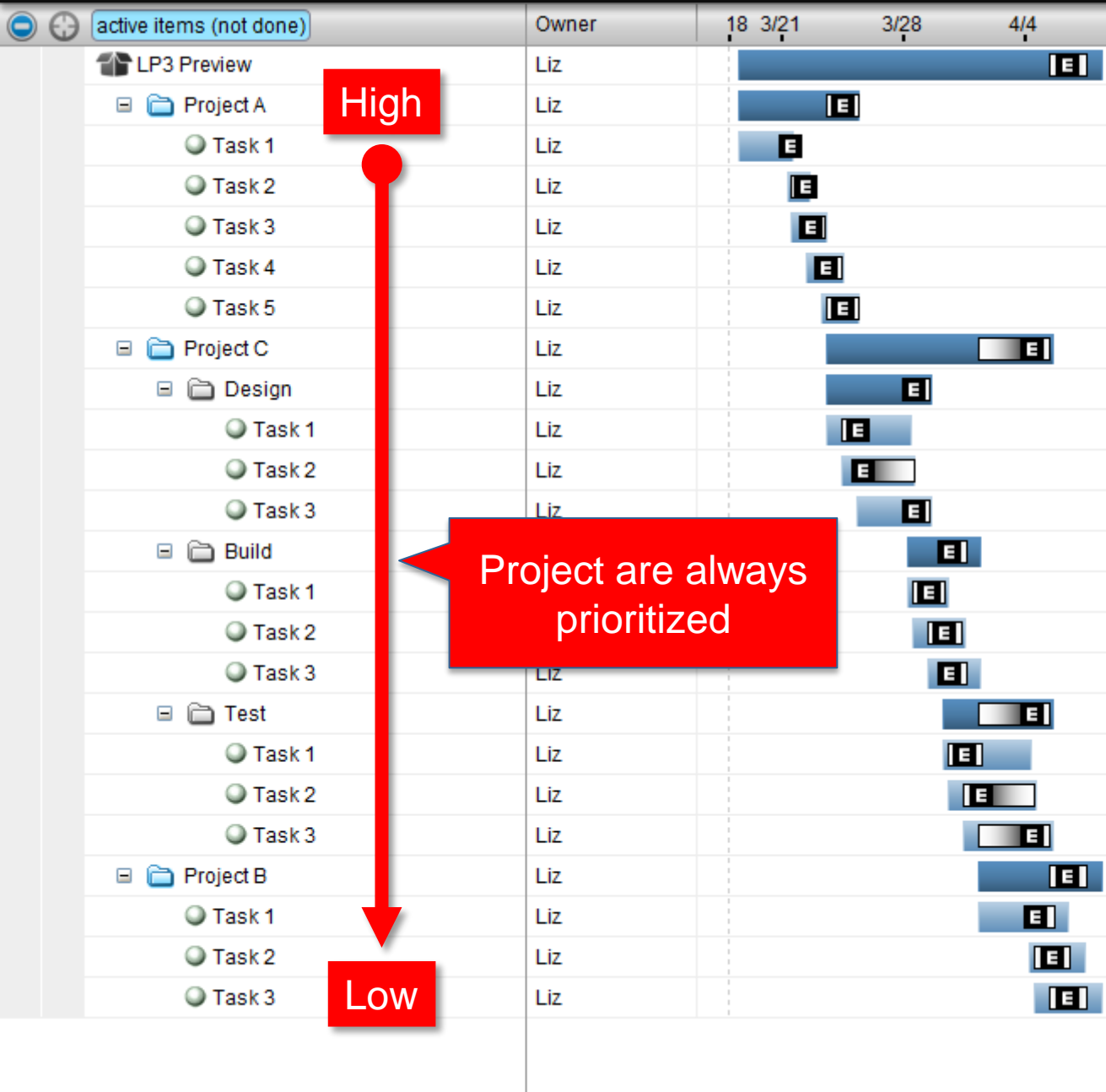
A Quick Walk Through Scheduling in LP 3.0

If you've looked at the LiquidPlanner 3.0 Beta Sandbox, you've seen that the Organize and Prioritize Views are gone.

Now you'll schedule in one view, and we hope it will make managing your projects and priorities easier than ever before.

Before we get to clean up, let's take a few minutes to go over the basics of using "Packages" instead of "Tasklists" for multi-project scheduling.





SINGLE-VIEW SCHEDULING

In LiquidPlanner 2.6, default tasklists are created automatically for each new project. You can drag them up and down in the prioritize view to schedule your work.

In LiquidPlanner 3.0, you'll simply prioritize the project itself – no more default tasklists to worry about.

Projects	Owner	17	Jun
LP3 Preview	Liz		E
ASAP	Liz		
Project A for Big Fish	Liz	E	
Task 1	Liz	E	
Task 2	Liz	E	
Task 3	Liz	E	
Task 4	Liz	E	
Task 5	Liz	E	
Project C for Big Fish	Liz		E
Design	Liz	E	
Task 1	Liz	E	
Task 2	Liz	E	
Task 3	Liz	E	
Build	Liz	E	
Task 1	Liz	E	
Task 2	Liz	E	
Task 3	Liz	E	
Test	Liz		E
Task 2	Liz		E
Task 1	Liz		E
Task 3	Liz		E
Project B for Little Fish	Liz		E
Task 1	Liz		E
Task 2	Liz		E
Task 3	Liz		E
Task 4	Liz		E

PACKAGES

To manage multiple projects in one view, you'll use Packages.

Packages are similar to the tasklists you have today in LiquidPlanner.

They form the framework for prioritizing individual tasks AND whole projects.

Projects	Owner	17	Jun
LP3 Preview	Liz		E
ASAP	Liz		
Project A for Big Fish	Liz	E	
Task 1	Liz	E	
Task 2	Liz	E	
Task 3	Liz	E	
Task 4	Liz	E	
Task 5	Liz	E	
Project C for Big Fish	Liz		E
Design	Liz	E	
Task 1	Liz	E	
Task 2	Liz	E	
Task 3	Liz	E	
Build	Liz	E	
Task 1	Liz	E	
Task 2	Liz	E	
Task 3	Liz	E	
Test	Liz		E
Task 2	Liz		E
Task 1	Liz		E
Task 3	Liz		E
Project B for Little Fish	Liz		E
Task 1	Liz		E
Task 2	Liz		E
Task 3	Liz		E
Task 4	Liz		E

PACKAGING INDIVIDUAL TASKS

In LiquidPlanner 2.6, you may have created your own tasklist structure to prioritize tasks from across your projects.

In LiquidPlanner 3.0, you'll do the same thing with packages – you can use them to establish **priority overrides** for individual tasks.

Projects	Owner	17 Jun
LP3 Preview	Liz	E
ASAP	Liz	E
Task 2 from Project C > Design	Liz	E
Project A for Big Fish	Liz	E
Task 1	Liz	E
Task 2	Liz	E
Task 3	Liz	E
Task 4	Liz	E
Task 5	Liz	E
Project C for ...	Liz	E
Design	Liz	E
Task 2 in ASAP	Liz	E
Task 1	Liz	E
Task 3	Liz	E
Build	Liz	E
Task 1	Liz	E
Task 2	Liz	E
Task 3	Liz	E
Test	Liz	E
Task 2	Liz	E
Task 1	Liz	E
Task 3	Liz	E
Project B for Little Fish	Liz	E
Task 1	Liz	E
Task 2	Liz	E
Task 3	Liz	E
Task 4	Liz	E

from Project C > Design

in ASAP

PACKAGING INDIVIDUAL TASKS

We dragged Task 2 into ASAP, and now the task is what we call “packaged.” It’s still part of the original project, though – just like in LP 2.6.

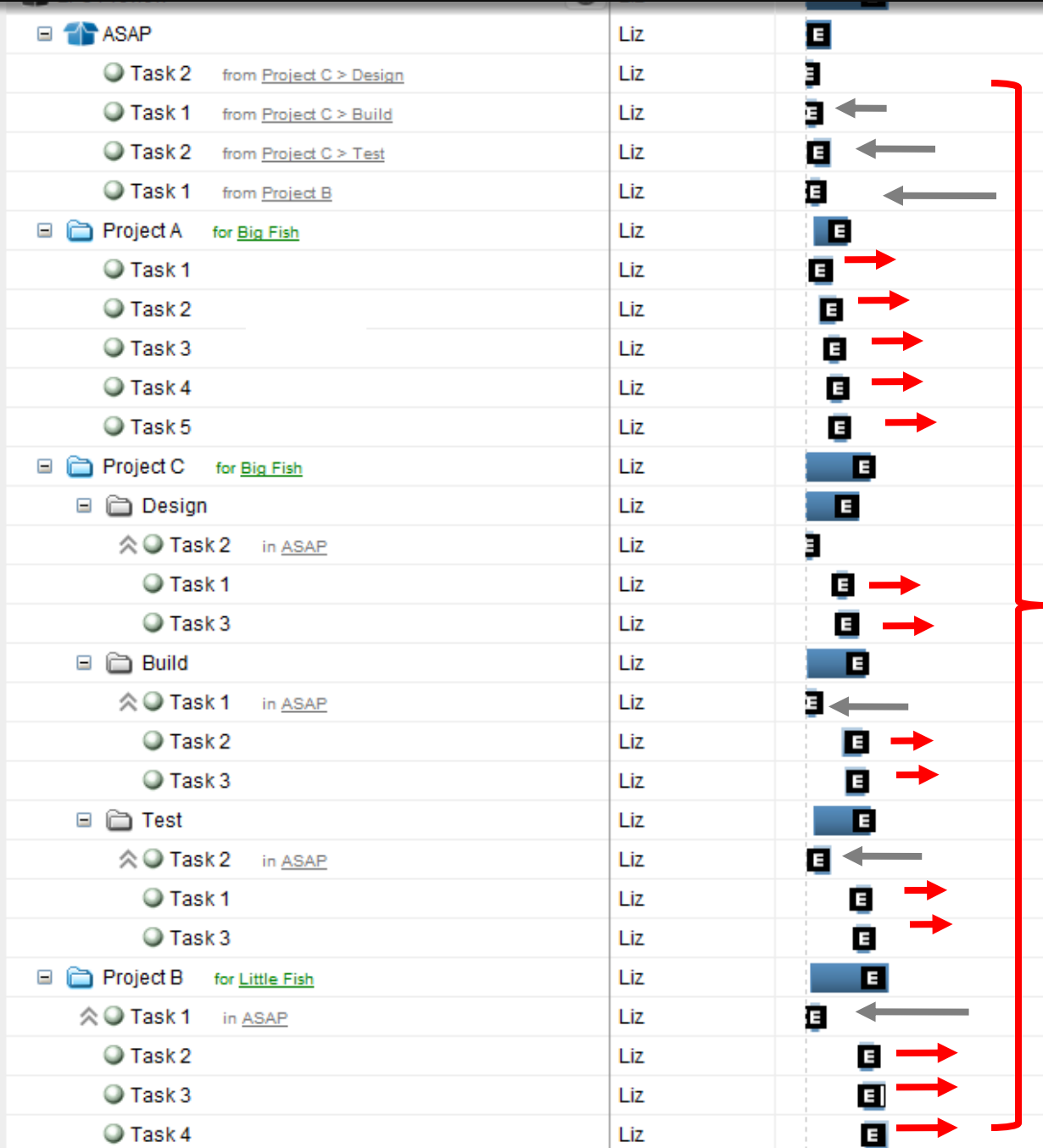
Notice that the schedule adjusts to reflect the new priority order and the tasks are reordered to within the project.

Projects	Owner	17	Jun
LP3 Preview	Liz		
ASAP	Liz		
Task 2 from Project C > Design	Liz		
Project A for Big Fish	Liz		
Task 1	Liz		
Task 2	Liz		
Task 3	Liz		
Task 4	Liz		
Task 5	Liz		
Project C for Big Fish	Liz		
Design	Liz		
Task 2 in ASAP	Liz		
Task 1	Liz		
Task 3	Liz		
Build	Liz		
Task 1	Liz		
Task 2	Liz		
Task 3	Liz		
Test	Liz		
Task 2	Liz		
Task 1	Liz		
Task 3	Liz		
Project B for Little Fish	Liz		
Task 1	Liz		
Task 2	Liz		
Task 3	Liz		
Task 4	Liz		



PACKAGING INDIVIDUAL TASKS

You can package individual tasks from **across all of your projects** to build a more granular list of priorities.



PACKAGING INDIVIDUAL TASKS

As you prioritize tasks from across your projects, your schedule will automatically adjust to reflect the new priority order.

ASAP	Liz	E
Task 2 from Project C > Design	Liz	E
Task 1 from Project C > Build	Liz	E
Task 2 from Project C > Test	Liz	E
Task 1 from Project B	Liz	E
Project A for Big Fish	Liz	E
Task 1	Liz	E
Task 2	Liz	E
Task 3	Liz	E
Task 4	Liz	E
Task 5	Liz	E
Project C for Big Fish	Liz	E
Design	Liz	E
Task 2 in ASAP	Liz	E
Task 1	Liz	E
Task 3	Liz	E
Build	Liz	E
Task 1 in ASAP	Liz	E
Task 2	Liz	E
Task 3	Liz	E
Test	Liz	E
Task 2 in ASAP	Liz	E
Task 1	Liz	E
Task 3	Liz	E
Project B for Little Fish	Liz	E
Task 1 in ASAP	Liz	E
Task 2	Liz	E
Task 3	Liz	E
Task 4	Liz	E

Priority Position

Placeholder

PACKAGING INDIVIDUAL TASKS

If you package a task, you'll see it listed twice in the plan: once in the package and once in the original project.

This ensures you can always see every task in your project, even if tasks have been prioritized separately.

Projects	Owner	19	Jun
LP3 Preview	Liz		E
ASAP	Liz		E
Task 2 from Project C > Design	Liz		E
Task 1 from Project C > Build	Liz		E
Task 2 from Project C > Test	Liz		E
Task 1 from Project B	Liz		E
Active Projects	Liz		
Future Projects	Liz		
Project A for Big Fish	Liz		E
Project C for Big Fish	Liz		E
Design	Liz		E
Build	Liz		E
Test	Liz		E
Project B for Little Fish	Liz		E

PACKAGING PROJECTS

Packages can also be used to group projects into a logical, priority-driven structure.

This is a great tool for teams with a long list of projects to manage.

Projects	Owner	19	Jun
LP3 Preview	Liz		E
ASAP	Liz		E
Task 2 from Active Projects > Project C > Design	Liz		E
Task 1 from Active Projects > Project C > Build	Liz		E
Task 2 from Active Projects > Project C > Test	Liz		E
Task 1 from Future Projects > Project B	Liz		E
Active Projects	Liz		E
Project A for Big Fish	Liz		E
Project C for Big Fish	Liz		E
Design	Liz		E
Build	Liz		E
Test	Liz		E
Future Projects	Liz		
Project B for Little Fish	Liz		E

Manage projects and priorities in one view

PACKAGING PROJECTS

In this example, packages have been used to create a “pipeline” for active and future projects.

You can set up packages to reflect the model that your team uses for prioritization.

Cleaning Up Your Workspace In Three Easy Steps

Good news! In the new LiquidPlanner, you won't need to manage as many containers as you did in LiquidPlanner 2.6. If you're in a hurry to streamline your new structure, here are some tips for doing so quickly.

If you don't have time to simplify your workspace now, don't worry – you can continue to use your old structure for as long as you need. Your schedule hasn't changed.

Let's get started...





Find your old tasklist structure under a package named, “Converted Tasklists.” Find your projects listed underneath in the order they appeared in the old “Organize View”.

Projects	Owner	Remaining Effort	hours	19	Jun
Brewster Web Design	Mary Ellen	[239h - 253h]	246h	E	
Converted Tasklists	Derek	[239h - 253h]	246h	E	
ASAP	Liz	[20.06h - 26.99h]	23.53h	E	
Events	Mary Ellen	[48h - 48h]	48h	E	
High Priority		[22.54h - 40.46h]	37h	E	
Medium Priority	Sean	[39.55h - 44.45h]	42h	E	
Low Priority	Liz	[48.68h - 55.02h]	51.85h	E	
External Website Project Tasklist	Mary Ellen	[0h - 0h]	0h	E	
Ongoing Tasks	Mary Ellen	[0h - 0h]	0h	E	
Site Upgrade Project for Client A	eileen	[68.06h - 74.99h]	71.53h	E	
Misc - Brewster Internal Work for Brewster Internal Work	Lynn	[48.68h - 55.02h]	51.85h	E	
External Website Project for Client C	Lynn	[54.13h - 61.87h]	58h	E	
Internal Website Project for Brewster Internal Work		[60.93h - 68.07h]	64.5h	E	
Brochure Project for Client A					

Former Tasklist Structure

Projects Listed Below

2

Drag your old structure up above the “Converted Tasklists” package, then delete the “Converted Tasklists” package.

Note: any task that lives outside of a package in that structure will need to be moved into a package first.

Projects	Owner	Remaining Effort	E hours	19	Jun
Brewster Web Design	Mary Ellen	[239h - 253h]	246h	E	
Converted Tasklists	Derek	[48.68h - 55.02h]	51.85h	E	
ASAP	Liz	[20.06h - 26.99h]	23.53h	E	
Events	Mary Ellen	[48h - 48h]	48h		
High Priority	Paul	[33.54h - 40.46h]	37h	E	
Medium Priority	Sean	[40.38h - 46.62h]	43.5h	E	
Low Priority	Sean	[39.55h - 44.45h]	42h	E	
External Website Project Tasklist	Liz	[48.68h - 55.02h]	51.85h	E	
Ongoing Tasks	Mary Ellen	[0h - 0h]	0h	E	
Site Upgrade Project for Client A	Mary Ellen	[0h - 0h]	0h		
Misc - Brewster Internal Work for Brewster Internal Work	eileen	[68.06h - 74.99h]	71.53h	E	
External Website Project for Client C	Lynn	[48.68h - 55.02h]	51.85h	E	
Internal Website Project for Brewster Internal Work	Lynn	[54.13h - 61.87h]	58h	E	
Brochure Project for Client A	Lynn	[60.93h - 68.07h]	64.5h	E	

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Replace “default tasklists” from LP 2.6 with actual projects in LP 3.0:

- Drag the project folder under the corresponding package.
- Select the tasks in the corresponding package and right click to “un-package” them.
- Delete the empty corresponding package.

Projects	Owner	Remaining Effort	E hours	19	Jun
Brewster Web Design	Mary Ellen	[239h - 253h]	246h	E	
ASAP	Liz	[20.06h - 26.99h]	23.53h	E	
Events	Mary Ellen	[48h - 48h]	48h		
High Priority		[...h - 40.46h]	37h	E	
Medium Priority		[...h - 46.62h]	43.5h	E	
Low Priority	Sean	[39.55h - 44.45h]	42h	E	
External Website Project Tasklist	Liz	[48.68h - 55.02h]	51.85h	E	
Design Task 1		[1h - 2h]	1.5h	E	
Design Task 2		[0.5h - 1h]	0.75h	E	
Design Task 3		[2h - 4h]	3h	E	
Site Build Task 1		[...h - 8.8h]	6.4h	E	
Site Build task 3		[...h - 10.4h]	10.4h	E	
Site Build Task 2		[...h - 8.8h]	8.8h	E	
Content Task 1		[6h - 8h]	7h	E	
Content Task 2		[6h - 8h]	7h	E	
Content Task 3		[6h - 8h]	7h	E	
External Website Project		[68h - 55.02h]	51.85h	E	
Ongoing Tasks		[0h - 0h]	0h	E	
Internal Website Project		[...h - 74.99h]	71.53h	E	
Brochure Project		[...h - 61.87h]	58h	E	
		[93h - 68.07h]	64.5h	E	

Need help? Call us at 1-800-971-1601 x110



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