

A QUICK OVERVIEW OF PRIORITY-BASED SCHEDULING

In priority-based scheduling, you don't set start and finish dates for each task.

You simply assign tasks, estimate effort, and arrange your tasks in priority order. The scheduling engine automatically calculates the probable start and finish dates for each task.

Each person's tasks will be scheduled in the order in which they're listed.

The first task is treated as your first priority, and is thus scheduled first, starting with today's date. The start dates of your subsequent tasks are determined by the amount of work preceding them. The range of likely finish dates is determined based on your ranged estimates. The scheduler also takes things like dependencies and events into account.

Packages can help you manage multiple concurrent projects.

If you haven't done so already, you'll find it helpful to read our [Packages](#) help article before proceeding further in this document. As noted in that article, packages can be used to facilitate cross-project prioritization of tasks or to add organizational structure into your plan. In this document, we are concerned only with cross-project prioritization.

USING PACKAGES FOR CROSS-PROJECT PRIORITIZATION

If you're juggling multiple projects, you might work a task from project A, then one from project C, then another from project A, etc. To schedule this in LiquidPlanner, you build a "to do" list from across your various projects by dragging and dropping individual tasks into a **package**. This creates "priority overrides" for those tasks.

The best package structure for you depends on the way you like to view and manage your work over time.

To figure out the degree of packaging you'll need to do, ask yourself these questions:

- Do we work on more than one project at a time?
- Does our schedule need to be precise and accurate as far into the future as possible?
- Or, do we mostly focus on the schedule for the near-term set of work?

Next, we'll show you some basic packaging models. Don't be limited by just what you see here. If you've created a different package structure that works well, we'd love to hear about it!

SAMPLE PACKAGING MODELS

LiquidPlanner helps you organize and schedule your projects in a way that reflects your team’s process for prioritization. Here are three common ways teams prioritize their work. Do any of them sound like you?

For the most part we work one project at a time until it is complete, then we move on to the next project.

- Prioritize project folders to reflect the intended project delivery order
- Add promise dates to project folders as appropriate
- Prioritize tasks within the project folders
- Package only individual tasks that bubble up in urgency and need to get done as an exception to the high-level project order.

Projects	Expand All Collapse All	Owner	Remaining Effort	'17	10/24	10/31
Jones, Inc.		Mary	[73.57h - 84.43h]			
Top Priority Tasks		Jason	[18.66h - 23.34h]			
Task 1 <small>from Project C</small>		Jason	[6h - 9h]			
Task 1 <small>from Project A</small>		Jason	[6h - 9h]			
Task 1 <small>from Project B</small>		Jason	[5h - 7h]			
Project A		Jason	[28.07h - 34.93h]			
Task 1 <small>in Top Priority Tasks</small>		Jason	[6h - 9h]			
Task 2		Jason	[6h - 9h]			
Task 3		Jason	[6h - 9h]			
Task 4		Jason	[3h - 5h]			
Task 5		Jason	[3h - 7h]			
Project B		Jason	[19.92h - 26.08h]			
Task 1 <small>in Top Priority Tasks</small>		Jason	[5h - 7h]			
Task 2		Jason	[6h - 9h]			
Task 3		Jason	[3h - 6h]			
Task 4		Jason	[3h - 7h]			
Project C		Mary	[21.62h - 27.38h]			
Task 1 <small>in Top Priority Tasks</small>		Jason	[6h - 9h]			
Task 2		Jason	[5h - 7h]			
Task 3		Jason	[3h - 7h]			
Task 4		Jason	[5h - 7h]			

We manage projects in an “agile” way. We work on multiple projects at the same time, but we mostly focus on the near-term set of work (which might include tasks from various projects).

- Order your project folders in as close to priority order as possible
- Package individual tasks that you will take on in the immediate set of work. If appropriate, also stage the next set of work.
- Add a promise date to the current package of work as appropriate
- Although un-packaged tasks *are* scheduled, you acknowledge that your long-term forecast isn't precisely accurate, since you are only granularly prioritizing tasks in your near-term set of work.

Projects	Expand All Collapse All	Owner	Remaining Effort	10/17	10/24	10/31
Agile Corp.		Mary	[73.57h - 84.43h]			
[-] Sprint 1		Jason	[25.72h - 31.28h]			
Task 1 from Project A		Jason	[6h - 9h]			
Task 1 from Project C		Jason	[6h - 9h]			
Task 2 from Project A		Jason	[6h - 9h]			
Task 1 from Project B		Jason	[5h - 7h]			
[-] Sprint 2 staging		Jason	[18.66h - 23.34h]			
Task 2 from Project B		Jason	[6h - 9h]			
Task 3 from Project A		Jason	[6h - 9h]			
Task 2 from Project C		Jason	[5h - 7h]			
[-] Project A		Jason	[28.07h - 34.93h]			
Task 1 in Sprint 1		Jason	[6h - 9h]			
Task 2 in Sprint 1		Jason	[6h - 9h]			
Task 3 in Sprint 2 staging		Jason	[6h - 9h]			
Task 4		Jason	[3h - 5h]			
Task 5		Jason	[3h - 7h]			
[-] Project B		Jason	[19.92h - 26.08h]			
Task 1 in Sprint 1		Jason	[5h - 7h]			
Task 2 in Sprint 2 staging		Jason	[6h - 9h]			
Task 3		Jason	[3h - 6h]			
Task 4		Jason	[3h - 7h]			
[-] Project C		Jason	[21.62h - 27.38h]			
Task 1 in Sprint 1		Jason	[6h - 9h]			
Task 2 in Sprint 2 staging		Jason	[5h - 7h]			
Task 3		Jason	[3h - 7h]			
Task 4		Jason	[5h - 7h]			

We work on multiple projects at the same time, and we want to see a precise long-term schedule forecast for all projects.

- Order your project folders in as close to priority order as possible
- Add promise dates to project folders as appropriate
- Package every task from every active project to reflect the order in which tasks across all projects will be completed
- Your long-term schedule forecast is as accurate as possible based on the assumption that all work for all projects is listed in the long-term intended order of completion

Projects	Expand All	Collapse All	Owner	Remaining Effort	'17	10/24	10/31	11/7	11/14
Jones, Inc.			Mary	[134h - 156h]					
October			Mary	[102h - 123h]					
Task 1	from Project A		Jason	[10h - 12h]					
Task 2	from Project A		Jason	[8h - 11h]					
Task 1	from Project B		Jason	[12h - 16h]					
Task 1	from Project C		Jason	[50h - 70h]					
Task 2	from Project B		Jason	[6h - 9h]					
Task 2	from Project C		Jason	[5h - 7h]					
Task 3	from Project B		Jason	[3h - 6h]					
November			Mary	[28.47h - 36.53h]					
Task 3	from Project A		Jason	[6h - 9h]					
Task 3	from Project C		Jason	[3h - 7h]					
Task 4	from Project A		Jason	[3h - 5h]					
Task 5	from Project A		Jason	[3h - 7h]					
Task 4	from Project C		Jason	[5h - 7h]					
Task 4	from Project B		Jason	[3h - 7h]					
Project A			Jason	[33.76h - 40.24h]					
Task 1	in October		Jason	[10h - 12h]					
Task 2	in October		Jason	[8h - 11h]					
Task 3	in November		Jason	[6h - 9h]					
Task 4	in November		Jason	[3h - 5h]					
Task 5	in November		Jason	[3h - 7h]					
Project B			Jason	[27.46h - 34.54h]					
Task 1	in October		Jason	[12h - 16h]					
Task 2	in October		Jason	[6h - 9h]					
Task 3	in October		Jason	[3h - 6h]					
Task 4	in November		Jason	[3h - 7h]					
Project C			Mary	[66.7h - 87.3h]					
Task 1	in October		Jason	[50h - 70h]					
Task 2	in October		Jason	[5h - 7h]					
Task 3	in November		Jason	[3h - 7h]					
Task 4	in November		Jason	[5h - 7h]					

NAMING YOUR PACKAGES

Regardless of which packaging model fits you, packages used for cross-project prioritization should be named in a manner that intuitively supports your general processes. There's no one best naming convention for all organizations, but here are some additional examples:

General Urgency - Top Priority, ASAP, High Priority, Medium Priority, etc.

Time Frames - Quarters, Months, Weeks, etc. Facilitates the grouping of tasks into defined time-frames.

Sprints - Commonly used by agile development teams. A sprint is the smaller near-term set of work that you are focused on.

Pipeline Model – ASAP, Active, Approved, Pending, Submitted, etc. Frequently used by large teams with formal project approval processes. A sprint is the smaller near-term set of work that you are focused on.

QUESTIONS?

To schedule a customized workspace review, please contact support@liquidplanner.com .