

The LiquidPlanner Genius Guide

We don't want you to be just a LiquidPlanner user; we want you to become a planning genius.

How to use this guide

This guide assumes you've already spent some time getting to know LiquidPlanner. Hopefully, you've already added some tasks and become familiar with the tabbed navigation and basic layout of our project management environment.

If not, we recommend that you first watch the video tutorials in the training center.

The screenshot shows the LiquidPlanner training center interface. At the top, there is a navigation bar with a home icon, the text "LiquidPlanner Inc.", a help icon, and a "report a bug | send feedback" link. Below this is a secondary navigation bar with tabs for "dashboard", "plan", "collaborate", "analyze", "history", "trash", "search", "members", and "settings". The user's name "Charles" and a "sign out" link are visible in the top right corner.

The main content area is titled "training center" and includes the following sections:

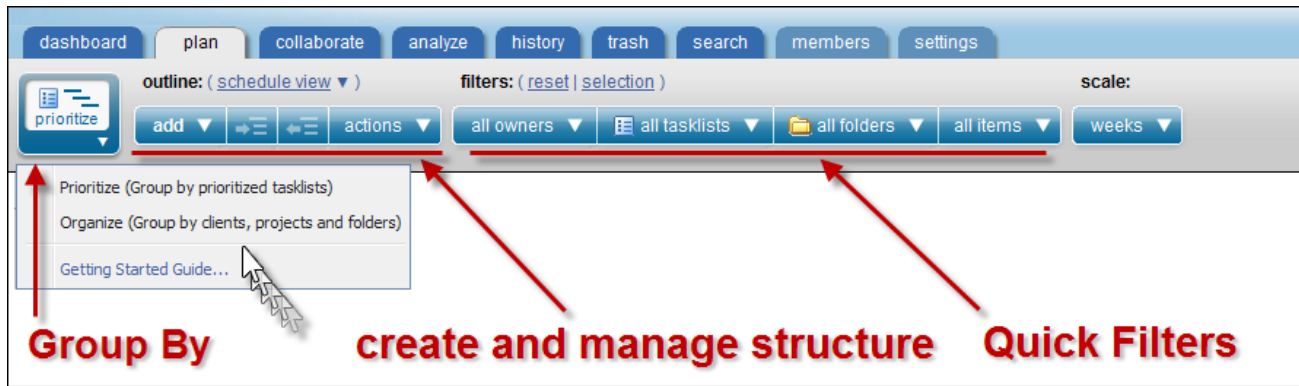
- More than anything, we want your projects to succeed. Here are some ways to get more help.**
- person to person**
 - Visit our [forums](#) to connect with our team for support and share thoughts with other LiquidPlanner users
 - Join a free [online training session](#) for a general overview and Q&A.
 - Need to talk to us? Contact [customer support](#).
- documentation**
 - [User Guide](#)
 - [LiquidPlanner Overview](#)
 - [Introducing LiquidPlanner](#)
 - [Best Practices](#)
 - [LiquidPlanner Differences](#)
 - [Adoption Tips](#)
- video tutorials**
 - feature overview
 - working with tasks
 - managing your schedule
 - your dashboard
 - collaborating with your team
 - using the analysis reports

Contents:

- Organizing Your Workspace Using “Group By”3
 - The “Group By” button..... 3
 - The “Marketing Project” example..... 4
- Mastering Scheduling9
 - What’s your unit of choice – days or hours?..... 9
 - Review availability..... 9
 - Using scheduling options..... 10
 - Dependencies..... 11
 - Multi-tasking 13
 - Work (effort) vs. duration 15
 - Partial effort 15
 - Estimating in ranges 16
 - Reading the LiquidPlanner schedule bars 16
- Tracking Work.....17
 - More on timesheets 17
- Learning from Data18
- Improving communication19
 - A new language for sizing projects..... 19
 - A new language for priority..... 19
 - How to use expected dates and promise dates 20
- Collaboration Features20
 - Workspace Chatter and Commenting 20
 - Using inbound email..... 21
 - Notification..... 21
 - Documentation..... 21

Organizing Your Workspace Using “Group By”

The single most important thing to master is how to use the **group by** feature of LiquidPlanner to organize and manage the tasks in your workspace.

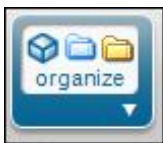


The **group by** feature, combined with the **quick filter** feature, creates a very powerful tool for organizing multiple projects in a single workspace. You’ll be surprised at how capable LiquidPlanner is at managing a whole portfolio of ongoing projects with very little effort once your structure is set up.

The “Group By” button

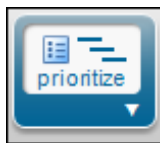
Your workspace has only **one** set of tasks but **two** different structures you can build up around the tasks to manage both project organization and process management of tasks. You can switch between these two structures using the “big button”.

Organize:

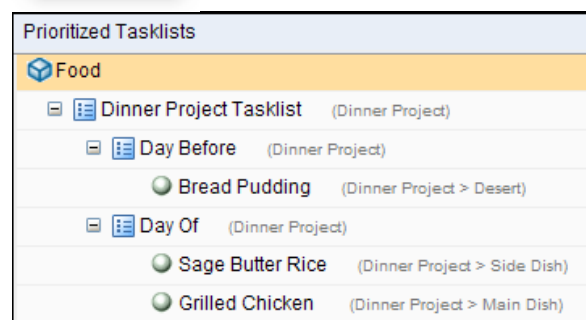
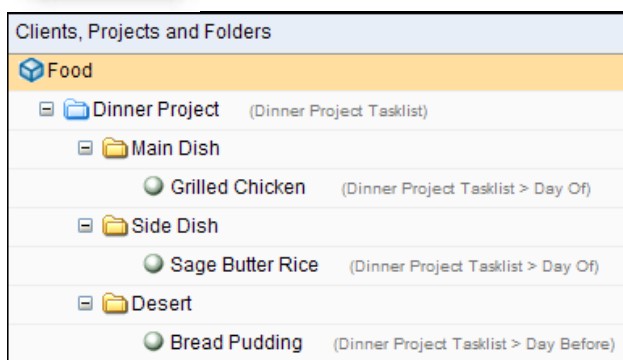


Group by clients, projects, and folders to organized tasks into a logical work structure that is independent of priority order.

Prioritize:

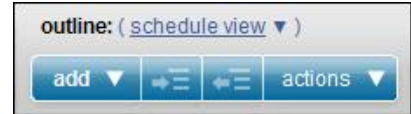


Group by prioritized tasklists and then drag tasks up & down to reprioritize tasks in the schedule.



Above, we see two different ways to look at *Dinner Project’s* tasks. On the left we can plan the meal; on the right we can plan the preparation.

LiquidPlanner’s task containers can be used to build a deep outline structure in both grouping methods. Creating an outline structure gives your team a way to put more advanced planning and process management concepts in place. Everything you need to do this is on the **outline button bar**.

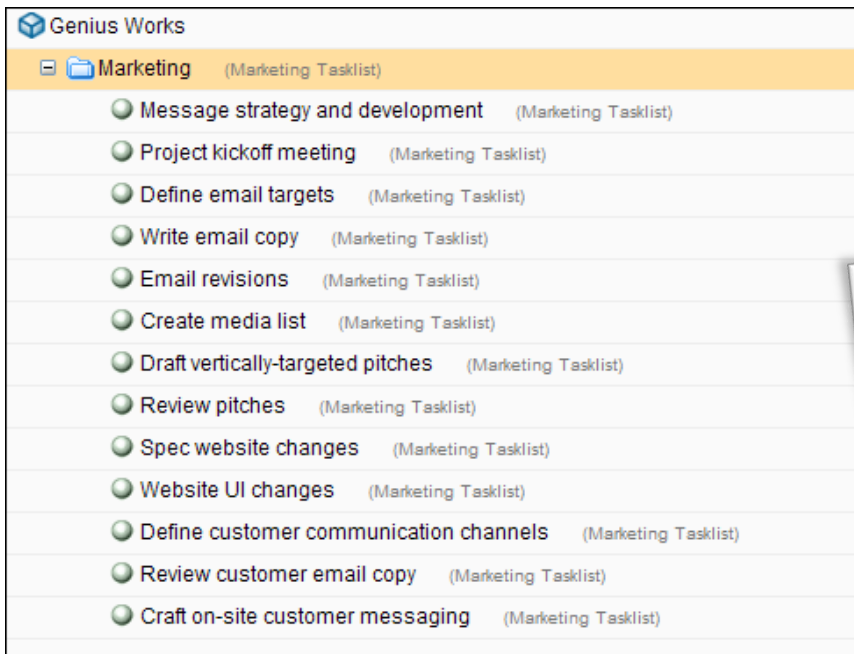
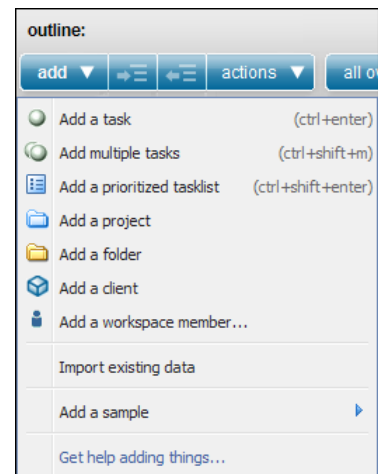


The “Marketing Project” example

This example shows how you can create the structure of your plan as you go. The story starts a project called “Marketing.” You can add a project very similar to this one to your workspace to play with by using the **Add a sample** command on the add menu.

On to the story... The genius who built this project clicked the **add** button in LiquidPlanner and used the **add project** command to create the blue project folder.

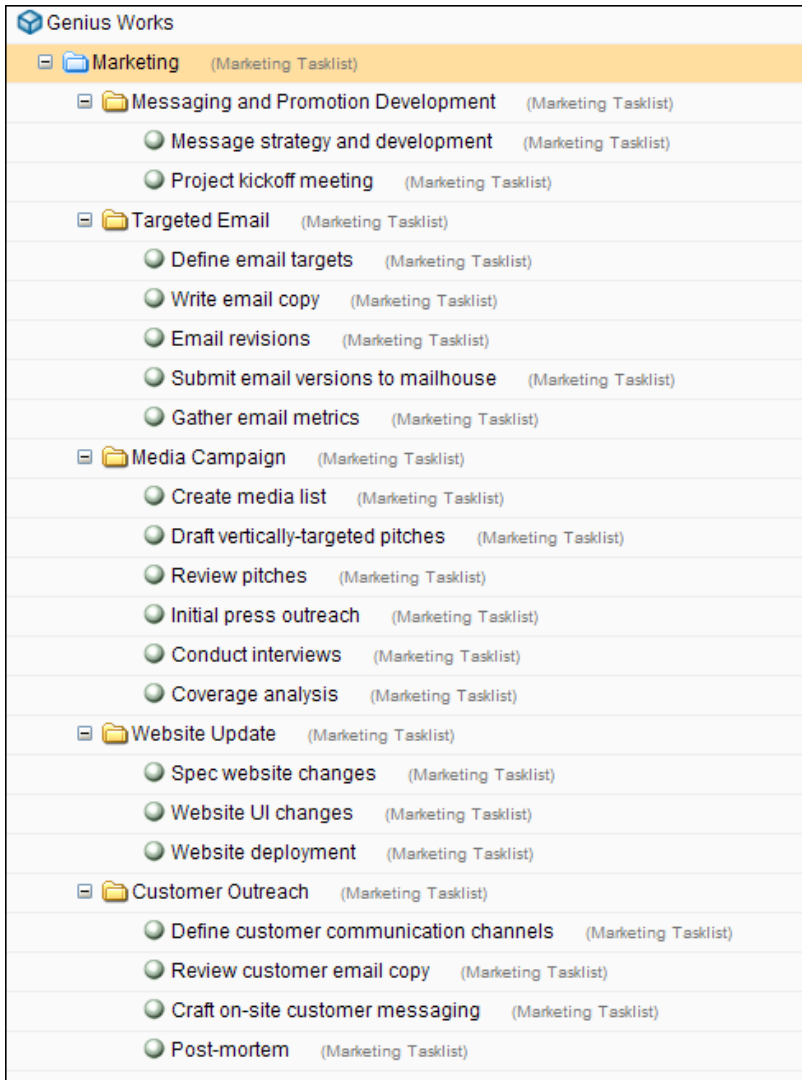
Next she used **add task** and **add multiple tasks** repeatedly to get the initial list of tasks into the plan.



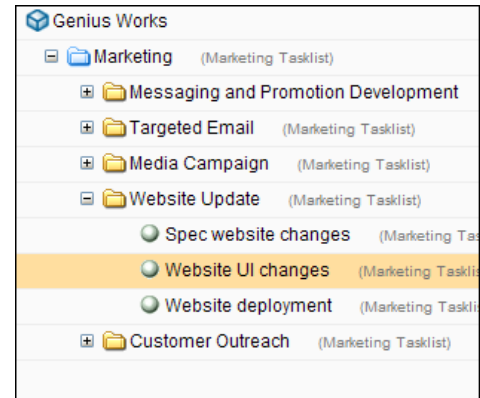
At this point our genius realized she was only half done adding tasks and it was already getting a little hard to see the forest for the trees, so she decided she needed some structure inside her projects.

Back to the **add** button where she added several yellow **folders** so that she could group related tasks together.

A little more work and a cup of coffee got her plan looking pretty reasonable...



At this point it's worth noting that she can expand and collapse sections to focus her attention now:

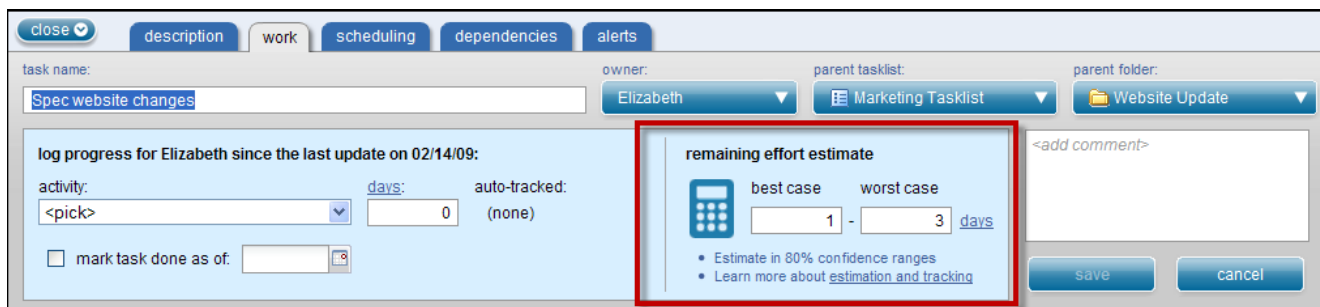


Our genius knew she wanted to have a credible schedule, so as she added estimates to her tasks using the detailed edit pane as she went along.

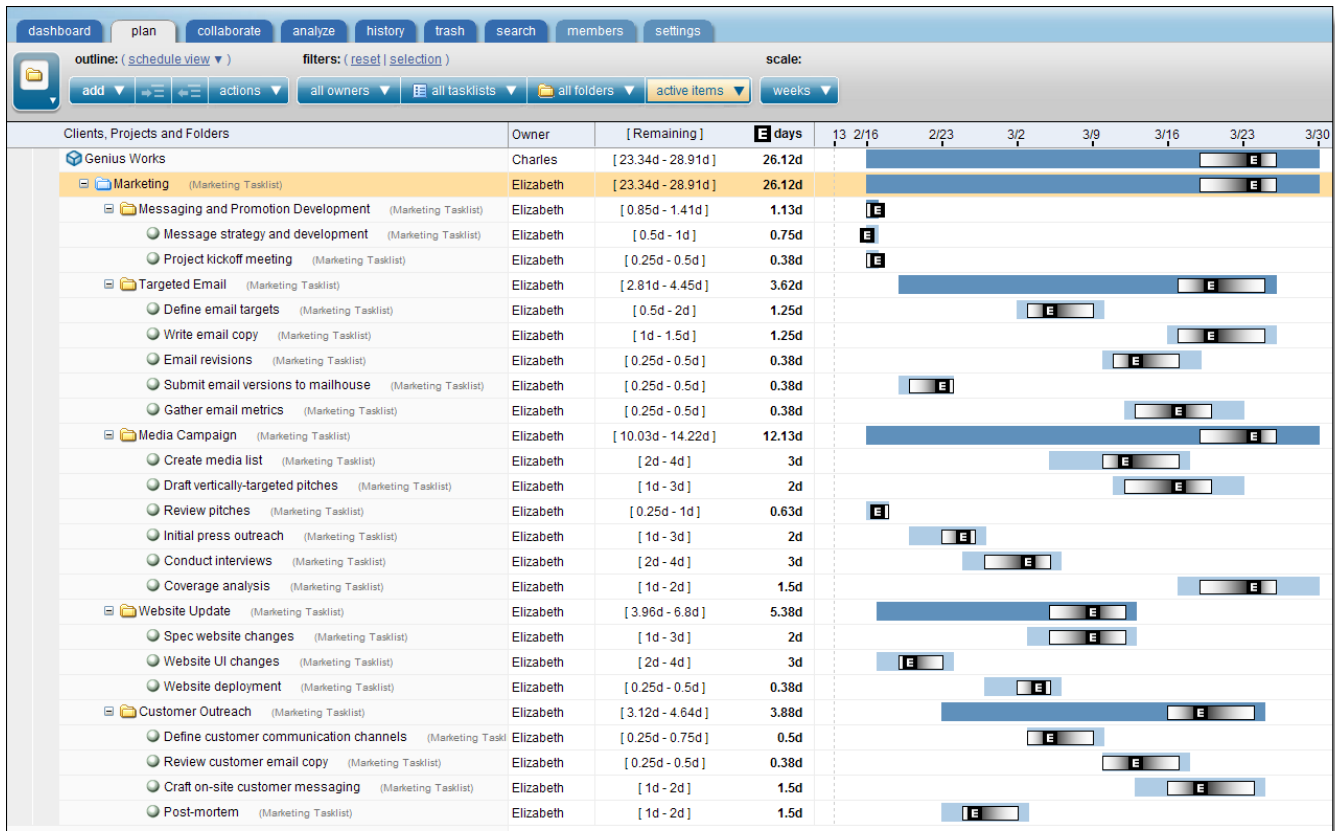
Of course she entered ranged estimates (a best case and a worst case scenario) because that's the way LiquidPlanner captures the uncertainty associated with each task.

She also knows that by entering her estimates this way, LiquidPlanner will

calculate a statistically correct project schedule that she can use to manage the risk associated with her projects.



With all the tasks organized logically and all the ranged estimates entered into the plan, she takes a look at the schedule that has been recalculated with each change she made.



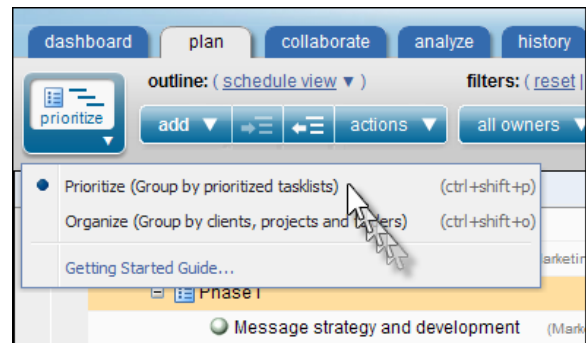
“Hmmm these tasks don’t seem to be happening at the right time”, she thinks. And she’s right.

Our genius was jumped around the structure adding tasks, moving them with **drag and drop**, and ordering them in a way that made sense logically.

On the tasklist side, the tasks were being added to the end of the default tasklist for the project.

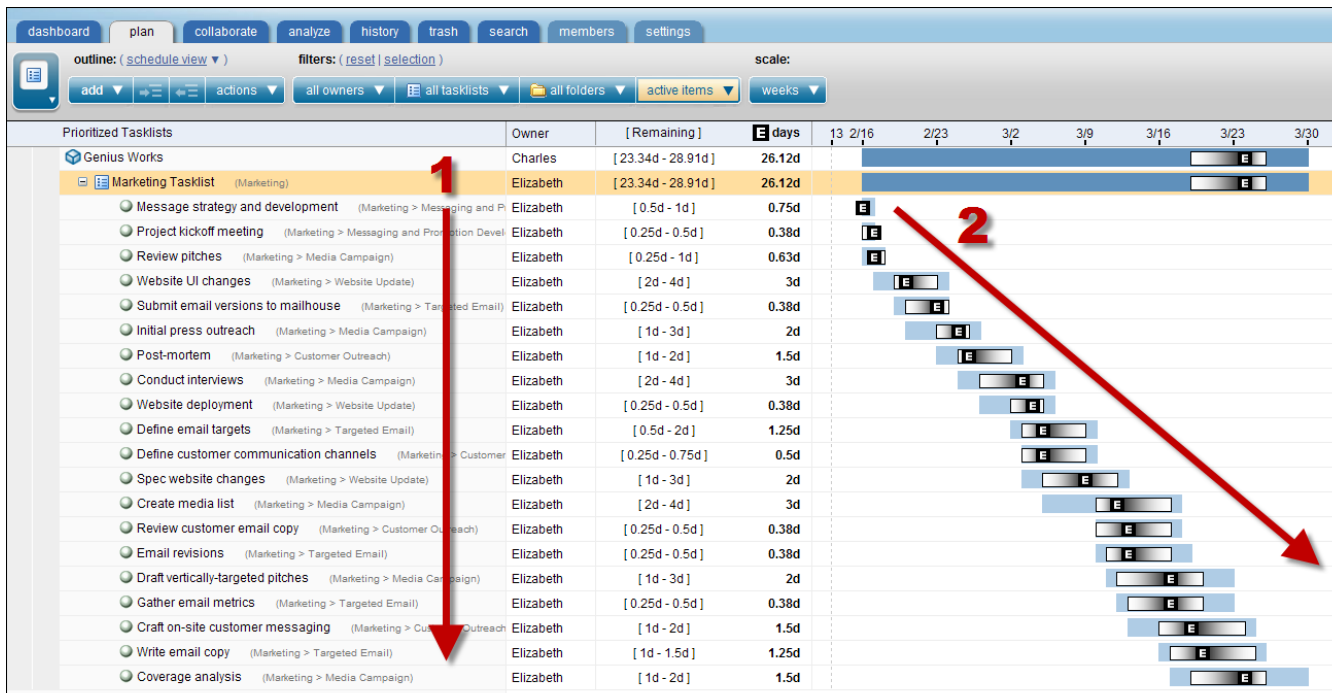
She has not yet considered priorities or adjusting the scheduling of the project.

To get a proper schedule in place, she’ll needs to switch to **group by prioritized tasklists**.



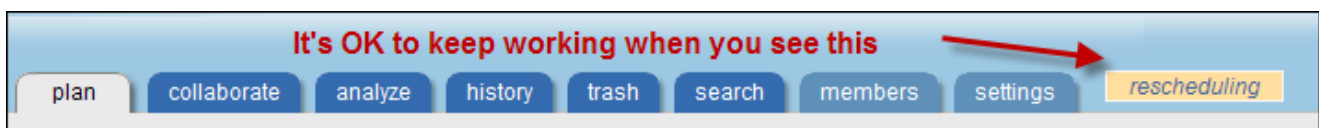
After switching to the Prioritized Tasklist view, our genius sees the same set of tasks. Just looking at this view you can see the schedule makes more sense. This is because now we are looking at the **schedule priority** of the tasks.

Schedule priority is simply the order of the tasks in the list from top to bottom (depicted by arrow #1.) The LiquidPlanner scheduling engine automatically flows out work in the schedule based on the priority order of the tasks (depicted by arrow #2.)



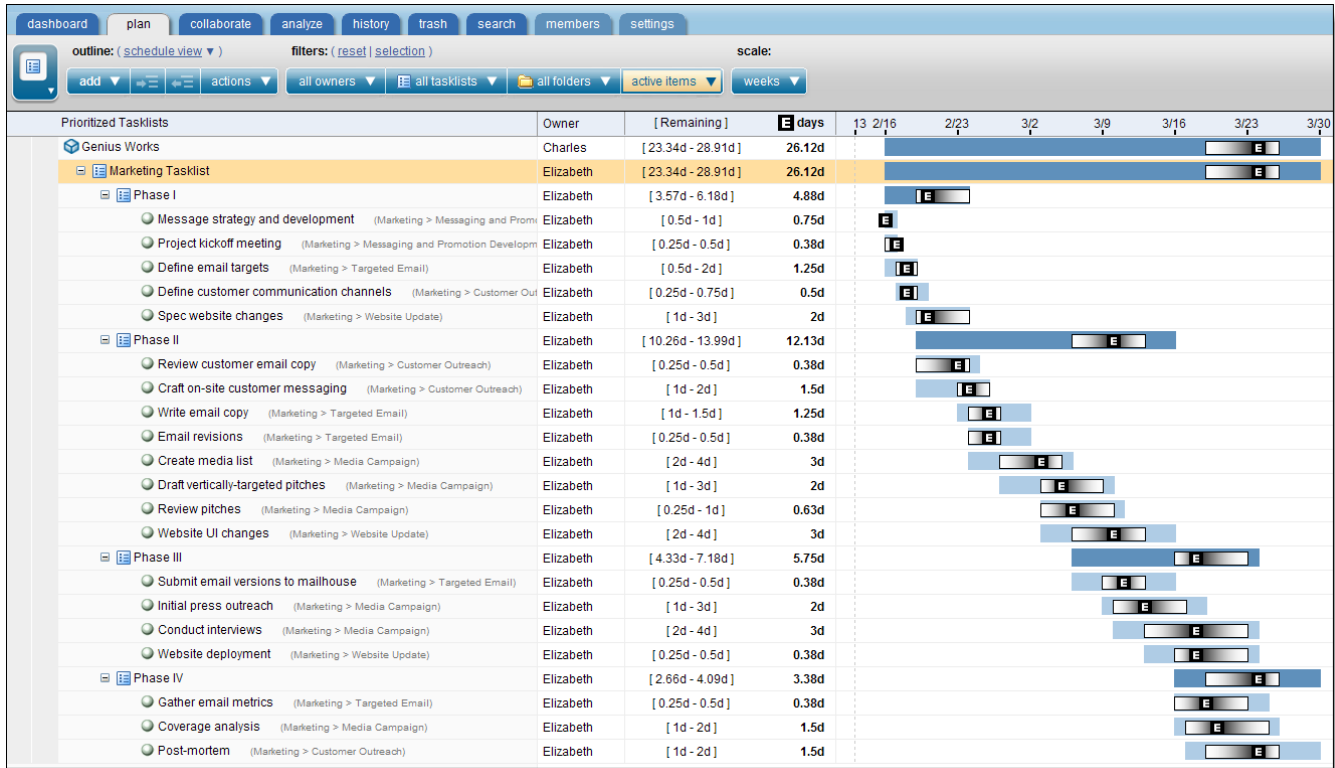
If you look closely, you'll see all these tasks are in a tasklist called "Marketing Tasklist". This was automatically created when the "Marketing" project was created. The project and tasklist were also automatically linked but you can change that linking.

Even though this schedule is understandable, our genius knows that these tasks are not in the right order, so she starts dragging things up and down to re-order the schedule. She will see the rescheduling indicator quite a bit but won't let that slow her down because she knows that the schedule recalculates in the background (asynchronously) and will catch up with all her edits.



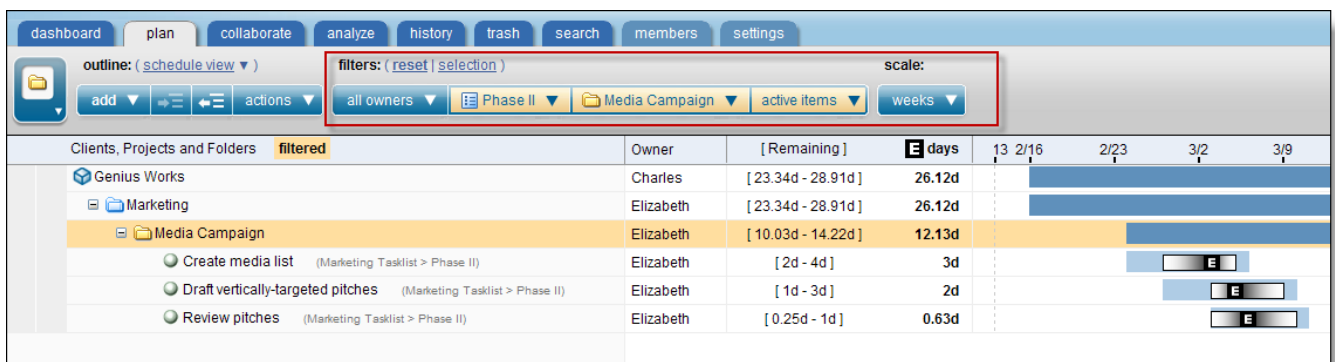
If it makes sense for your organization to use one big flat tasklist, then feel free to do so. It certainly makes it easy to create any priority order you want. However, our genius expects that her plan will ultimately include many tasks and she wants to add a bit more structure.

She knows that this project is going to get done in phases, so she creates some additional tasklists to represent those phases and reorganizes her tasks into four phases.



Now the schedule is ready. She notices that she can look at the gray note after the task name and see where the task lives in the client/project/folder structure.

She can also use the **group by functions** and **quick filters** to zero-in on just the tasks that she wants to see, such as the “Media Campaign” tasks that occur in “Phase II.”



Our genius reaches for the **actions** button and prints out a PDF copy of the filtered schedule and runs to her project status meeting with a clear picture of her project plan in hand.

Mastering Scheduling

In the example above we only considered scheduling for one person. When scheduling for multiple people, there are a number of things you'll want to be aware of.

What's your unit of choice – days or hours?

It's a simple but important choice. If you work on lots of small tasks and use timesheets, you probably want to set your default unit to hours. If you work on bigger tasks with longer estimates, then you might want days.

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LiquidPlanner Inc.
This is the official workspace of the LiquidPlanner team.

Workspace details:
 Owner: Jason (jason@liquidplanner.com)
 Workspace ID: 1
 Default unit: hours
 Hours per day: 8
 Members: 17
 Tasks: 4153
 Tasklists: 147
 Folders: 195
 Items in Trash: 959
 Invitations sent: 16
 Comments: 5912
 Links: 117
 Attached files: 1770
 Disk usage: 272.8 MB / 2 GB

Workspace settings:
 Grant LiquidPlanner technical support permission to view this workspace.
 name: LiquidPlanner Inc.
 description: This is the official workspace of the LiquidPlanner team.
 Time conversion factor: 1 day equals 8 hours ([read before changing](#))
 Default unit: days hours
 save cancel

Destroy the workspace:
Workspaces can not be recovered after being destroyed.
[destroy the workspace](#)

Review availability

Go to the members tab and click on the links in the availability column for each team member to review their availability.

The settings show a typical work week.

Don't forget to set the typical daily start time.

Day of week: Sun Mon Tue Wed Thu Fri Sat

Availability (hours): 0.0 8.0 8.0 8.0 8.0 8.0 0.0

Daily start: 08 : 00

First availability date: Last availability date:

Using scheduling options

The screenshot displays a Gantt chart for a project named 'Marketing Tasklist' under the 'Genius Works' folder. The chart shows a timeline from 3/2 to 3/30. The 'Marketing Tasklist' is highlighted in red, indicating a promise date. Below the chart, the 'Scheduling' details pane is open, showing the task name 'Marketing Tasklist', owner 'Elizabeth', parent tasklist 'Genius Works', and parent folder 'Genius Works'. The 'Scheduling' pane includes fields for 'delay until', 'promise by' (set to 03/23/09), and 'on hold' (unchecked). There is also a 'save' button and a 'cancel' button.

There are three important scheduling options: **delay until**, **promise by**, and **on hold**. They are pretty obvious once you find them on the scheduling tab of the details pane. These options work on tasks, but they are most useful on tasklists or projects.

Above, you can see the effect of setting a promise date on the *Marketing Tasklist*. Promise dates drive alerts and they are inherited by items grouped under the parent tasklist or project. Promise dates drive red alerts for tasks that are at risk of not getting done by the promise date.

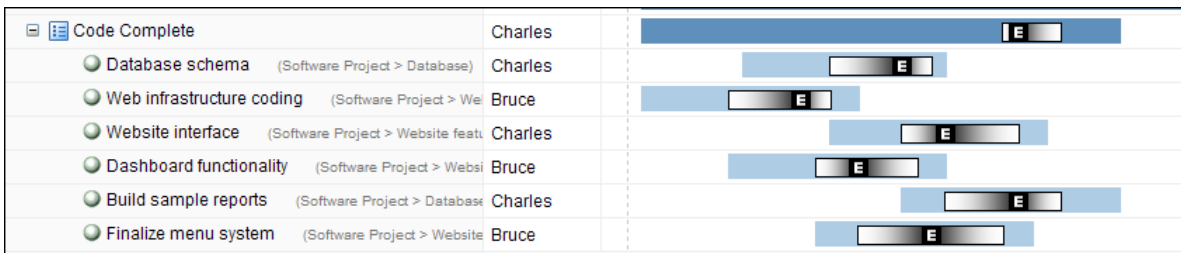
Use *delay until* for projects that should not start until that date. Note it may start later than that date if higher priority work pushes the project out. Use *on hold* to keep work off the schedule entirely.

Dependencies

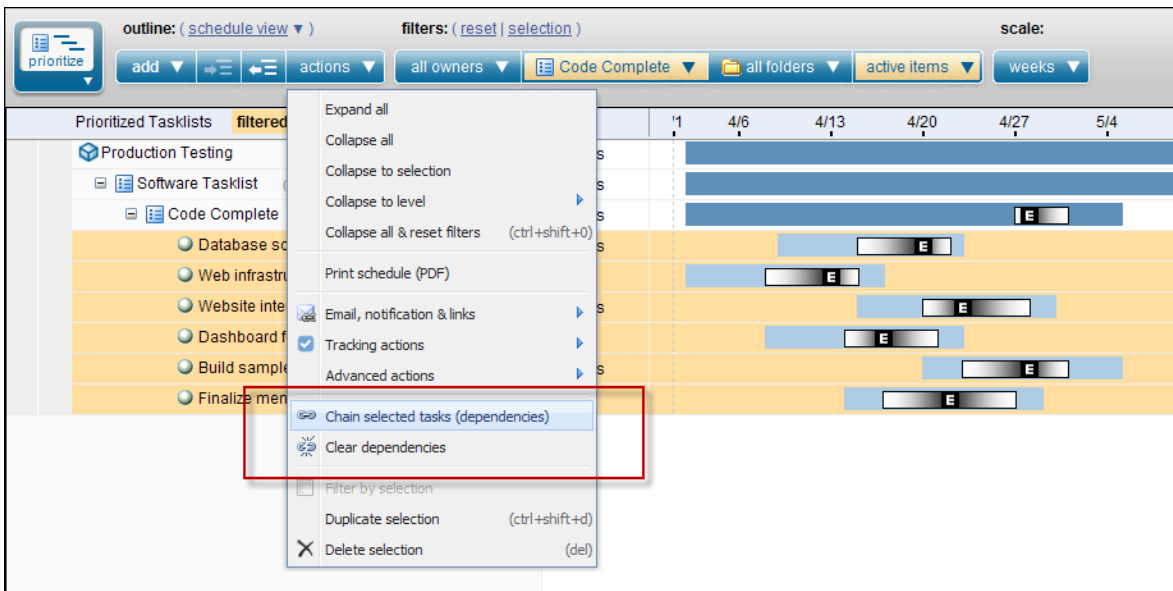
If you have multiple people in your project, you'll probably need to set a dependency. There is no need to set dependencies between tasks that are owned by the same person because they are implied by the tasklist order and re-prioritizing (re-ordering) is the best way to solve that scheduling issue.

It is recommended that you use dependencies sparingly as they complicate plans. You should use them on tasklists when possible. To set them up, edit an item in the plan and navigate to the **dependencies** tab in the detail edit pane. There are **four tricks** you'll want to learn if you are using dependencies.

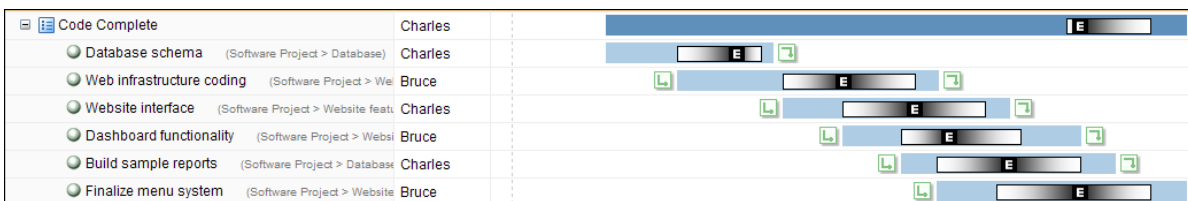
Trick 1 – If you have a set of tasks that need to occur in order and they are assigned to different people, you'll need more than prioritization, you'll need to **chain** them together. For example:



To do this, multi-select the tasks (shift+click or ctrl+click) and choose **Chain** from the actions menu:

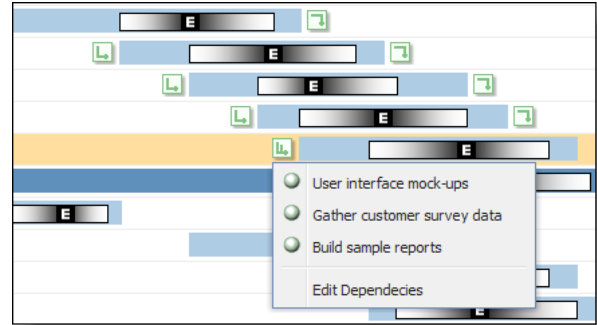


Bingo, everything is in order:

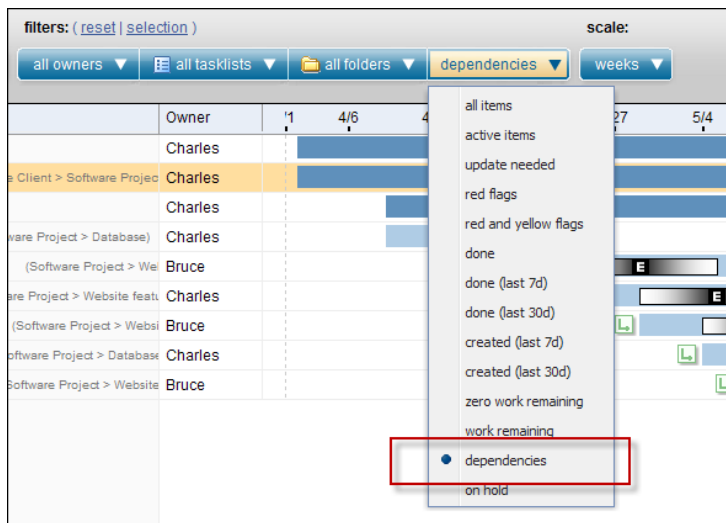


Trick 2 – In trick 1 you saw how we did a multi-selection. You can also multi-select and **clear** dependencies from the actions menu.

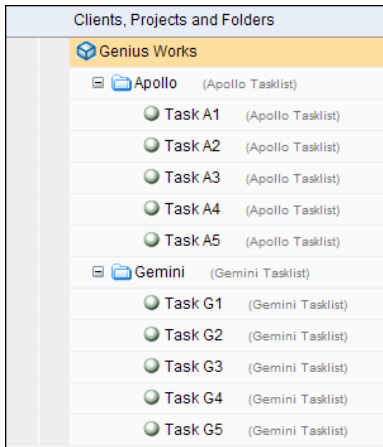
Trick 3 – Follow or edit dependencies by clicking on the **green arrows** next to the schedule bars. You'll get a pop-up menu that lets you move the selection to the dependency.



Trick 4 – **Filter** by dependant tasks. If you have a large plan it can be hard to see the dependencies. The last button on the filter bar has many useful filters and way down at the bottom is a great one that shows only tasks that that are in one way or another dependant.



Multi-tasking



Most teams run more than one project at once and find they end up multi-tasking and wondering how to schedule that.

The recommended approach is to build your projects using **add project** because this will give you a blue project folder with a matching tasklist that are linked to each other.

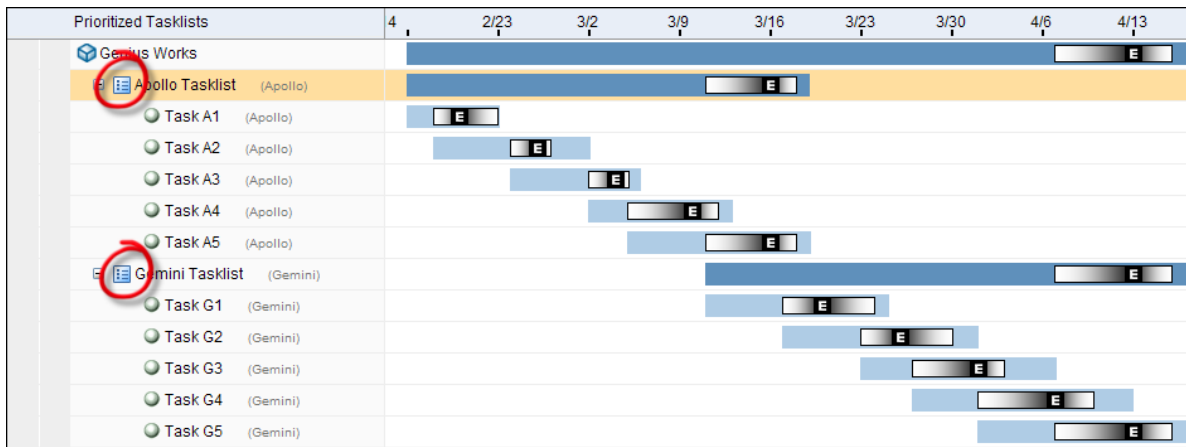
The key to modeling multi-tasking is creating tasklists that align with your methodology. This could be as simple as the three tasklists called *ASAP*, *In Progress*, and *Backlog*.

Often times it makes sense for multiple projects to share the same set of tasklists built around a shared deliverable schedule or a specific methodology (eg. agile software development). The LiquidPlanner system is quite flexible. If you can't figure out how to model your process using structured tasklists, drop us a line at support@liquidplanner.com for some help.

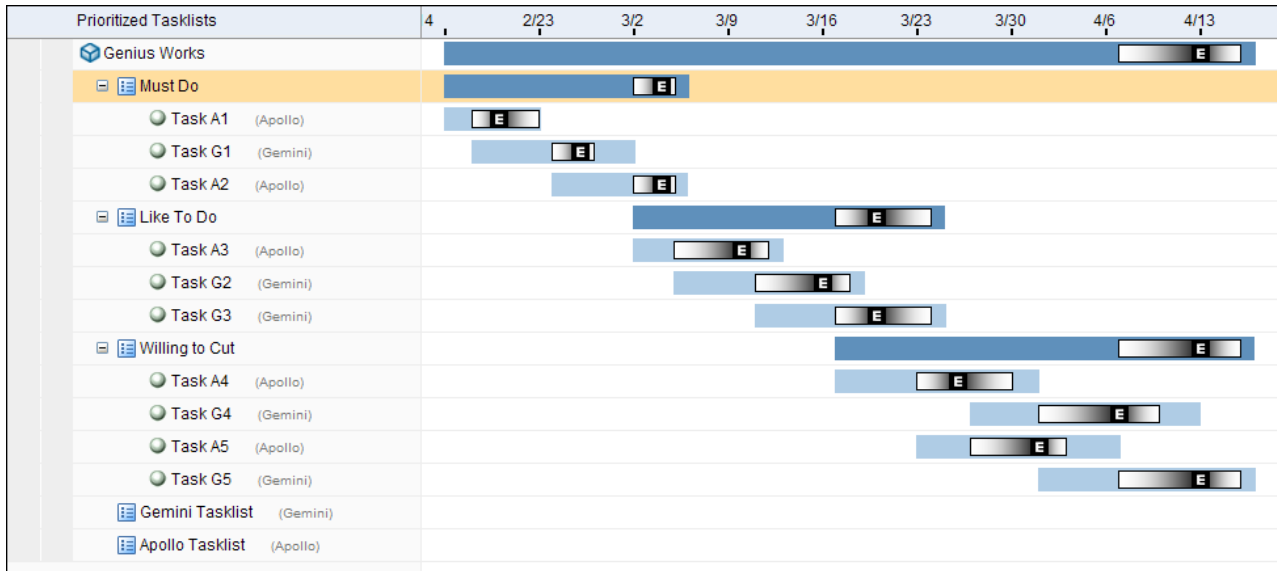
To illustrate multi-tasking, consider the two projects shown above: **Apollo** and **Gemini**.

These projects were created using the **add project** command so if we switch to **group by prioritized tasklists** we'll see the corresponding tasklists (below).

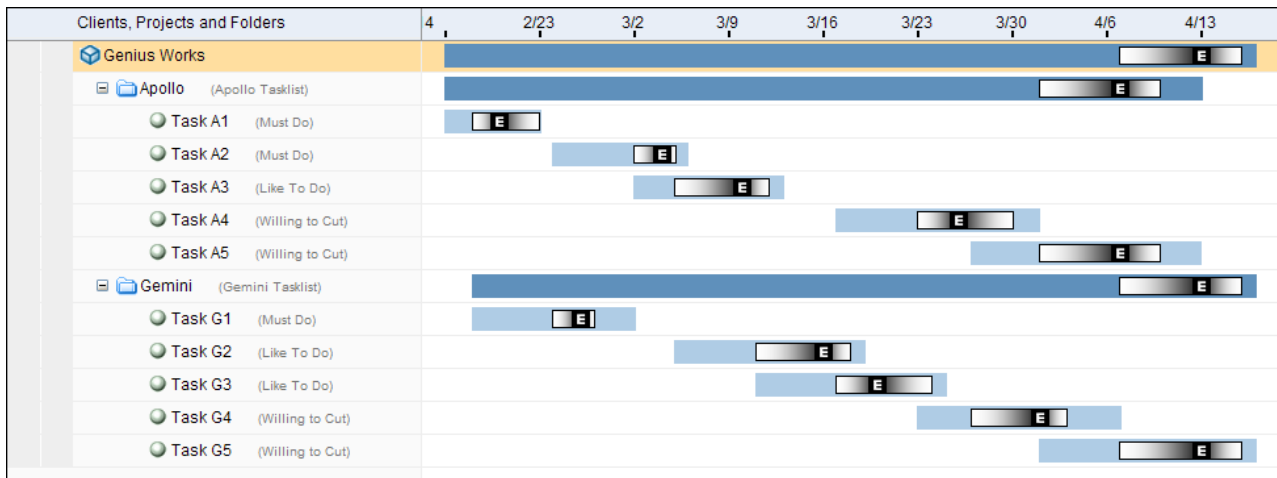
The order of the tasks in the schedule looks identical to when we were grouped by project because the projects were just created. Note how the projects are scheduled one after the other. If we dragged the Gemini Tasklist in front of the Apollo Tasklist, they would swap order on the schedule and Gemini would get done first.



But suppose the reality of your organization was that these projects need to take place concurrently. How do you model that? In this case you might define three **new tasklists** called *Must Do*, *Like To Do*, and *Willing to Cut* (these could just as easily be called *Hi*, *Med*, and *Low Priority*). Dragging the tasks into these lists would produce a schedule like this:



We see a different execution order with the project tasks co-mingled. If you switch back to **group by clients, projects, and folders** you'll see clearly that both projects now span the whole timeline and finish roughly at the same time. You'll also see that the order of the tasks has not changed under the project folders.



Note that the gray notes after the task names show what tasklist each task is in. You can use this trick to model releases, sprints, and launches (really any time-based, stage-based, or priority-based methodology.)

Only LiquidPlanner offers the utility of tasklists to help manage the ongoing execution of your projects.

The team at LiquidPlanner manages all operations in our workspace and uses tasklists extensively to model process. Here's a screenshot of the official LiquidPlanner workspace that we use to build LiquidPlanner along with a few tips and tricks:

The screenshot displays a 'Prioritized Tasklists' view for 'LiquidPlanner Inc.'. The list includes various tasklists such as 'EVENTS', 'ASAP', 'OPERATIONS', 'SPRINT 16', 'Bugs', 'Documentation', 'Testing -- test plans here --', 'Launch', 'Post Launch', 'S16 Hotfix', 'UNTRIAGED', 'BIZDEV', 'FEBRUARY', 'SPRINT STAGING', 'MARCH', 'BACKLOG', 'ONGOING', 'BACK BURNER', 'CLOSED', and 'Testing Center'. Callout boxes provide the following information:

- Model events and vacations as high priority tasks with no uncertainty and a specific "delay until" date.** (Points to the 'EVENTS' tasklist)
- Create special tasklists for high-priority interrupts. Go to the collaborate tab and set watches on tasklists or folders to be notified of changes.** (Points to the 'ASAP' tasklist)
- Prioritize tasklists by moving them up and down. Set promise dates on tasklists and folders to see alerts when schedules are at risk.** (Points to the 'S16 Hotfix' tasklist)
- Put tasklists on hold to keep the work off your schedule.** (Points to the 'CLOSED' tasklist)

Work (effort) vs. duration

Task estimates in LiquidPlanner represent the amount of work (specifically the amount of *remaining* work) there is for a task. If a task is estimated at 5-10 days that means one should expect to put in 5-10 full days of work before it is done. That's different than saying I will be done in 5-10 days. For instance, if my availability is set to half days, then LiquidPlanner will schedule that same task to complete in 10-20 calendar days because that's how long it takes to get 5-10 days of work done if one works half time.

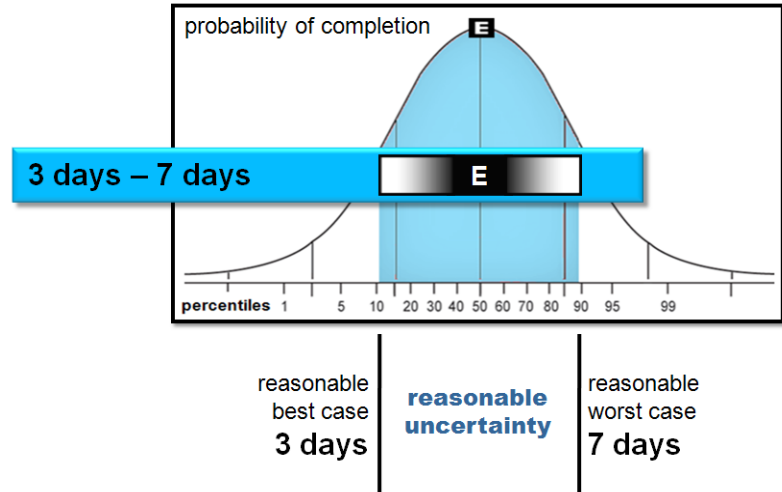
Partial effort

LiquidPlanner does not support partial effort on tasks (eg 50%); it always assumes you are working on the highest priority task at 100% effort. Usually this is no problem because tasks are small and the system self-corrects as you track work. In some cases people need to model a set of tasks that are truly worked on concurrently. The recommended way to handle this is to create a tasklist for that set of tasks and use the rolled-up tasklist schedule as the projected start and exit date for that whole set of tasks (and any task in it). This

technique will actually give you a better schedule result (statistically correct), allow you to set a promise date (alert) for the set, and it's pretty easy to do.

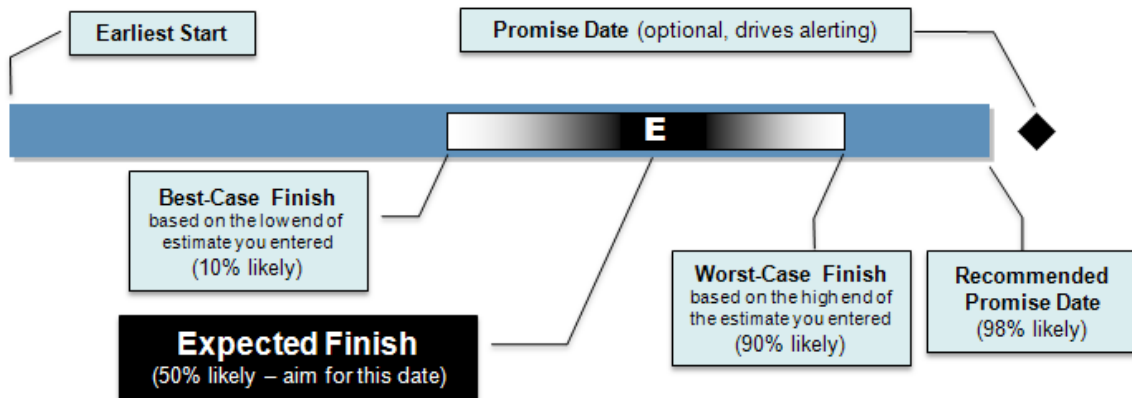
Estimating in ranges

Estimating in realistic ranges is one of the single best and easiest things you can do to improve your project outcomes. It will change your team's perspective on work and scheduling and moves conversations from uncomfortable negotiations to open and honest dialogues about requirements and ways to work together constructively to get rid of uncertainty. Estimating in ranges is a transformative shift forward in project management thinking and is an excellent method for managing risk.



Reading the LiquidPlanner schedule bars

Only LiquidPlanner has a scheduling system that allows you to capture, view, and manage uncertainty in your project schedule. This flexibility is the result of estimating tasks in ranges (e.g., 5 - 15 days) instead of single, fixed estimates (e.g. 10 days). Think of this as creating a best- and a worst-case scenario for completing a task. Once you enter this estimate, LiquidPlanner does the hard math to create a statistically correct schedule you can trust.



Useful tips:

- Most people start by estimating in ranges that too narrow; don't be afraid to make them wide.
- Each person has their own schedule priority, sometimes moving the task to another person is the best way to get it scheduled sooner.

Tracking Work

The best way to track work is to turn on the **timesheets** features; you can do this on the settings tab. When you do, each team member gets their own timesheet page, like this one:

The screenshot displays the 'my timesheet' interface for a user named Charles. At the top, there are navigation tabs: dashboard, plan, collaborate, analyze, history, trash, search, members, and settings. Below these, the user's profile and a 'ready for review' button are visible. The main section is titled 'Week #5 (01/25/09 - 01/31/09)' and features a grid with columns for each day from Sunday to Saturday. Each row represents a task, such as 'Ad hoc testing', 'Meetings', 'Marketing Support', 'Customer Support', 'Email processing', 'Finance Support', 'Screen shots for WITA video', 'Refactor sales model', and 'bug' entries. The grid cells contain numerical values representing hours worked. A total of 47.30 hours is displayed at the bottom right of the grid. A summary bar at the bottom shows the total hours for each day: Sun 10.00, Mon 11.00, Tue 9.17, Wed 6.13, Thu 4.00, Fri 6.00, Sat 1.00, and a total of 47.30.

You can also track work on any task from the detailed edit pane. It's no coincidence that the tracking input is right next to the estimate of the remaining work; it's a best practice to update these together—doing so will give you the most accurate schedule possible.

The screenshot shows a 'log progress' dialog box for the task 'Define email targets'. The dialog has tabs for 'description', 'work', 'scheduling', 'dependencies', and 'alerts'. The 'work' tab is active. It displays the task name, owner (Elizabeth), parent tasklist (Phase I), and parent folder (Targeted Email). The 'log progress' section includes a dropdown for activity (set to '<pick>'), a 'days' field (set to 0), and an 'auto-tracked' field (set to 'none'). There is a checkbox for 'mark task done as of:'. The 'remaining effort estimate' section shows a calculator icon and fields for 'best case' (0.5) and 'worst case' (2) days. A comment field and 'save'/'cancel' buttons are also present.

More on timesheets

Timesheet data can be exported for billing and deeper analysis. More information is available in the forums located at <http://www.liquidplanner.com/forums/> or by contacting support@liquidplanner.com.

Learning from Data

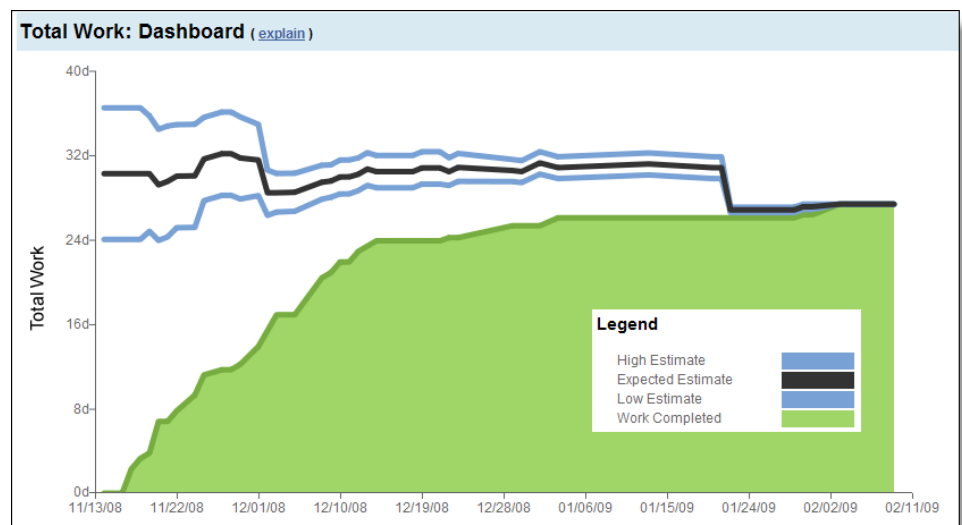
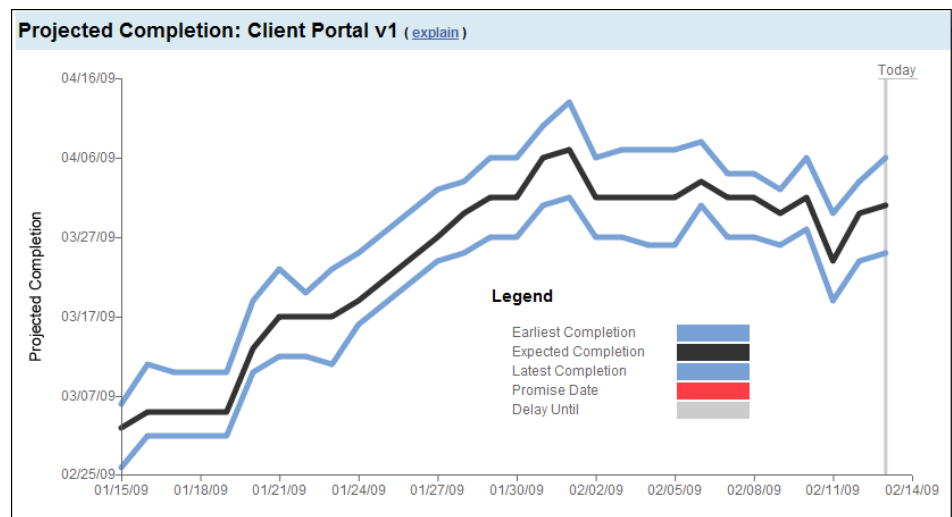
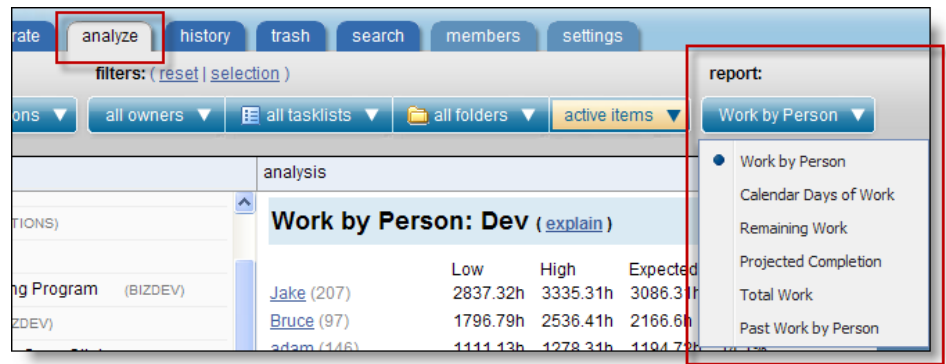
After you've been using LiquidPlanner for a while, take a look at the reports in the analysis tab.

There is some good stuff in there that will show you if your schedule is slipping or if your estimates were any good.

This can be particularly useful in helping teams learn because data has no agenda; it's just the record of what happened.

Things to look for:

- Tasks and projects that are estimated in ranges which are too narrow.
- Projects with end dates that are changing unexpectedly. For instance, a promise date that moves out every day would be a bad thing.
- Unexpected changes in total work, which usually means scope was cut from the project; was it supposed to be cut?



Improving communication

A new language for sizing projects

Elizabeth has spent a week getting used to LiquidPlanner and has shown her team that ranged-estimates will put them all in a better position to communicate risk and the realities of the schedule to each other and project stakeholders.

In fact, her team has started seeing ranged estimates everywhere they look:

Q: *How long is your commute?*

A: *30-60 minutes, depending on traffic.*

Q: *How much are we willing to spend on outside design services?*

A: *Maybe 5-10K, depending on who we get.*

Q: *How long does it take to bake a pizza?*

A: *12-18 min, depending on your oven :)*

That morning Max, the lead developer for the team, walks into Elizabeth's office and says "I got it Liz!"

"This ranged-estimation stuff allows us to finally tell the truth. We no longer have to commit to some single number that is either ridiculously optimistic or is sand-bagged to cover our tails". "Yep, that's it Max", she says. "Now you can just be the honest expert you are and contribute a realistic input to the plan that represents both the best case and worse case with at least 80% confidence. A wide range is fine to start; we can refine it as we go." Max smiles and says "I'm in."

A new language for priority

Elizabeth has always been smart and the phrase "make that top priority" bugs her. "Don't people understand that not everything can be priority #1?"

LiquidPlanner solves this problem with priority-based scheduling and **one global priority order**. The tasklist order *is* the priority of the work and LiquidPlanner lays the work out on the schedule using the priority and any dependencies. Low priority work can flow forward to fill slack time in the schedule created by dependencies, but people are never scheduled for more work than they have availability.

This helps teams by making it clear that **business priority** (how valuable something is to the organization) and the **schedule priority** are two separate things.

Find more [adoptions tips](#) in our [resource center](#).



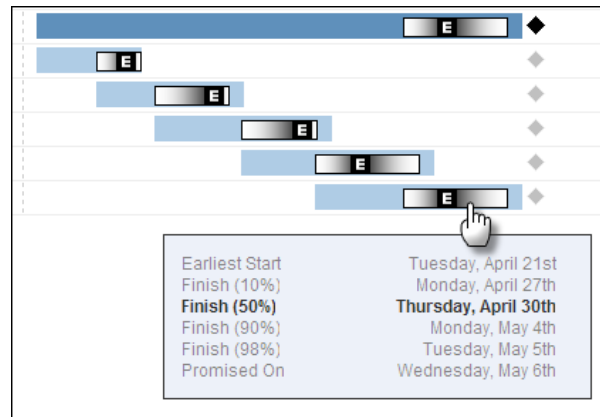
How to use expected dates and promise dates

Earlier, we introduced the LiquidPlanner schedule bar; now let's look at how to manage your team using those bars.

The Liquid Planner visual system is designed to help you focus your attention on two things, first the expected date indicated with a big **E**.

There are two simple rules to remember:

- Work diligently towards the **E** re-estimating as you go. *Treat it as your **target** and if you are doing it right, ½ the time you will be under, ½ the time you will be over.*
- Treat the end of the bar as the **safe promise date**. This is the 98% confidence date.



Use promise dates to your advantage. You can set a promise date on any item in the plan and if the **E** gets too close to the promise date (the system will start alerting you with red “on fire” flags). Set a promise date on a container and all its children will inherit that promise date.



Collaboration Features

The key to any project management tool is to make sure there is high return on the time invested in keeping it up to date. This is where the team at LiquidPlanner has put great effort into bringing you the best planning experience possible with a web-based application.

Workspace Chatter and Commenting

Liquid planner has a rich commenting system that allows your team to carry on a conversation on any item in the plan. You've probably run into this already and discovered you can post general comments as well.

Using commenting is a great way for your team way to stay connected, especially if members of your team work remotely. You can use this feature to cut down on meeting time and move conversations out of email, where threads get lost easily and are disenfranchised from task work.

Messages to you will also be included in your email notifications alongside the notification of data changes on your items (or ones you set a watch on).

Using inbound email

There are a number of email integration features available in LiquidPlanner that are very handy. Go to the **Settings tab | Email Integration** page to learn more. Inbound email is one of those features. You can send email messages complete with file attachments directly into LiquidPlanner and they will show up as new tasks in your plan.

Notification

Click the “watch star” on any item in the plan and be notified of changes. Click “watch” on a task contain and be notified of any changes to all the items in that container. You can even watch the whole space via the right-click menu.

Missed a change and want to research changes? Go to **changes** on your dashboard to see a log of recent changes or go to the **history** tab to see the history for any item.

Documentation

Finally no more searching disconnected file shares for documents and starting new document files just to capture a few simple notes. LiquidPlanner has ready-to-write web pages for every item in the plan. You can attach office documents, write rich detailed notes, and embed pictures, as well has have an ongoing discussion. Just visit the **collaboration** tab.

This is the end of the current version of the Genius Guide. We update it from time to time, so stay tuned to find out what happens to Elizabeth on our next update. Drop us a line at feedback@liquidplanner.com if have any thoughts to share.

Coming soon: Client Portals