TurboProject®

Getting Started Guide

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Welcome to TurboProject

TurboProject is a general purpose planning and scheduling tool that can be used by both novices and professionals. You'll appreciate the ease with which you can work; planning, scheduling, and managing your projects.

Here's a sample of the things you can do with your projects, using TurboProject:

- Use the Outline Gantt view and the Project Tree to navigate your project. With a single click, you can expand the entire view of your project
- Print a colorful picture of your project and review the activities and resources in exactly the setup you like, or send a report by email to a team member
- Produce professional management presentations, displaying schedule dates and resource and expense information summarized at any level of detail

Understanding Project Management

A project is anything that requires a well-defined sequence of activities to achieve a specific goal. It has a start date and a finish date, and can include events or milestones at strategic intervals.

When you manage a project, you need to successfully undertake and complete activities on time and within budget. A successful project plan provides a checklist and sequence of activities, and identifies the roles and responsibilities of the project team and the assigned resources.

A typical project includes the following components:

- Project Goal
- Events
- Schedule
- Activities
- Progress Reporting
- Resource Management
- Project Evaluation on Completion

The Role of the Project Manager

As the Project Manager, you play a role similar to that of an orchestra conductor. Like the conductor who relies on a series of steps to achieve a successful musical performance, a project manager plans the project, providing a structure with a common goal, and leads a team to successful completion of the project.

In order for a plan to be useful, the manager must be able to answer some critical questions:

- What progress have we made?
- Do we have enough resources?
- Are the resources allocated effectively?
- How will the end date be affected if materials are not delivered on time?

TurboProject can help you answer these questions.

Project Modeling

After you have defined the goals and milestones for a project, the next logical step is to model your project. The objective of modeling is to produce a project blueprint based on the characteristics and needs of the project. Modeling occurs at two levels:

- Structuring a project into phases
- Structuring a phase into activities

There are two basic approaches used when modeling a project:

Top-down—Start by listing the major phases of the plan, then fill in the details for each phase. This process provides an organizational structure, making it easier to understand the scope of the entire project.

Bottom-up—Start by listing all the activities that must occur. For complex projects, you may want to organize the list into an outline, summarizing similar or related activities. The activities are connected, creating a schedule with a start date and an end date.

Project Tracking

In order to assess the progress of your project at any point in time, you must be able to compare actual work done to the original plan or baseline.

Project tracking should be performed regularly to identify potential conflicts and problems before they occur. By periodically updating your project, you will be able to answer questions about the status, resource usage, work done, and work remaining.

Before your project begins, take the time to determine how progress should be tracked and how to capture the information you need to effectively monitor performance.

Consider the following:

- How often do you want to measure progress: weekly, bi-weekly, monthly?
- How will you gather progress information?
- How many reporting levels do you require?
- What level of detail does each reporting level require?
- What information do you require to make rescheduling decisions?
- Do you have to report progress for both internal and external organizations?
- What must you report, and to whom?

Wrapping up the Project

When your project is finished, you must assess the outcomes. Was it successful? Was it on time and on budget? Your answers to these questions will help you plan new projects. You will be able to identify any mistakes made, or gaps in information, and correct these situations in future planning projects. This evaluation process helps you to improve your project management skills.

TurboProject helps you to stay organized. It lets you prepare professional closeout reports and use previous projects as templates for new ones. You can review information on how budgets were spent, where resources did not work as efficiently as estimated, or where a change of tactics allowed the schedule to be improved.

System Requirements

Your computer must meet these minimum requirements before you can install and run TurboProject.

Minimum	Recommended
Windows 95, Windows 98, Windows 2000, or Windows NT 4.0	Windows 95, Windows 98, Windows 2000, or Windows NT 4.0
486 PC	Pentium 200 or greater
32 MB RAM for Windows 95 or 98 64 MB RAM for Windows 2000 or NT	64 MB RAM
SVGA monitor, 640 x 480, 256 colors	SVGA monitor, 800 x 600, 256 colors
22 MB hard drive space	26 MB hard drive space
CD-ROM drive	CD-ROM drive
Any Internet Browser	Internet Explorer 5.0 Netscape Navigator 5.0

Installing TurboProject

Before installing TurboProject, close all programs that run automatically, including anti-virus software, screen savers, and third-party memory managers. Also, remove any disks from the floppy drives.

To start the automatic installation:

1. Insert the TurboProject CD into your CD–ROM drive.
   If the installation begins automatically, follow the instructions on the screen.
2. When prompted, indicate which options you want to install.
3. Click **Next** to move to the next step, **Back** to return to the previous step, or **Cancel** to cancel the installation.

To install TurboProject manually:

1. On the Windows toolbar, click **Start**.
2. Select **Run**.
3. Click **Browse** and navigate to the CD-ROM drive.
4. Double-click **setup.exe**.
5. Click **OK** and follow the instructions on the screen.

NOTE: *Before you start TurboProject, restart your computer and review the README file, which contains the latest information.*

Registering Your Software

When you install TurboProject, you'll be asked to register your software. Once you have registered, you can take full advantage of the many available support options. Registration also ensures you will be notified of any future upgrades to TurboProject. For information about the technical support services that are available, see "IMSI Technical Support Services" on page 5.

To register your software:

1. Start TurboProject.
   The initial screen opens.
2. Choose one of the following methods:
   - Quick Registration
   - Full Registration
   - Telephone Registration
3. Complete and submit the corresponding form.

Removing TurboProject

If you decide to uninstall TurboProject, you will remove the application and all related files from your computer.

To remove TurboProject from your computer:

1. On the Windows taskbar, click **Start**.
2. Select Settings|Control Panel.
3. Double-click **Add/Remove Programs**.
4. Select **TurboProject** from the list of software.
5. Click **Add/Remove**.
6. When you are prompted, click **Yes** to continue.
7. After the program is removed, click **OK**.
8. Click **OK**, and close the Control Panel dialog box.

IMSI Technical Support Services

Free Support on Demand:
IMSI offers free technical support at http://www.imsisoft.com/support. You have access to Frequently Asked Questions (FAQ), Downloads and Patches, Product Updates (if available), and searchable Knowledge Base.

Email Support on Demand:
Email support is available at $4.95 per incident. An incident is defined as one issue and one solution. Please complete the email support request form at

http://www.imsisoft.com/support/support_email.html. All major credit cards accepted.

Phone Support on Demand:
Phone Support is available at $9.95 per incident. Call today! (505) 248-9999.

On occasion, a problem can be traced to hardware, or to another software application. Our technicians will supply as much support as possible in these cases, but they are not authorized to support products manufactured or published by another company.

Technical Support Checklist

To receive the fastest response to your technical questions, please review the following checklist before sending your email message:

- You may already have the information you need; check your documentation thoroughly. Refer to the online Help and the Readme file. Let the technician know what you've tried
- Record the exact sequence of events that created the problem. Make sure that you can reproduce the problem by following the same series of steps
- In your email, please provide the name and version number of the application. To get the exact version number, select Help|About
- Know the type of computer and Windows version you are using
- Record the exact wording of any error messages
- Be sure that your return email address is valid

2

Starting a New Project

This guide is designed to quickly teach you how to create simple projects using TurboProject. It shows you how to enter activities, add resources, and organize projects, so that you will immediately appreciate the benefits of using TurboProject for your project scheduling and tracking.

We have provided sample data for you to use while working through the tutorial. However, if you have an idea for a project, simply follow the steps in each section using your own data.

Managing Files

Efficient file management is the key to organizing your workplace. Take time to plan how you will manage your project files. Set up directories in groups of related projects. Use logically named folders, so that project team members can find your project information quickly and efficiently. Give a descriptive name, up to eight characters long, to your project files. Remember to use the description field to help you and others further identify the file. If you have a particularly complicated project, document your file structure in a text document, and name it so anyone can tell what the text file is about.

For example, name the text file *Howitwks.txt, FindFile.txt,* or *FileName.txt*. If your computer system supports file names longer than eight characters, you can be more specific, like, *HowItWorks.txt, HowToFindProject Files.txt,* or *HowtoName_FindProjectFiles.txt.*

Remember that the time you take now saves you time later, and more importantly, creates an environment conducive to good file management.

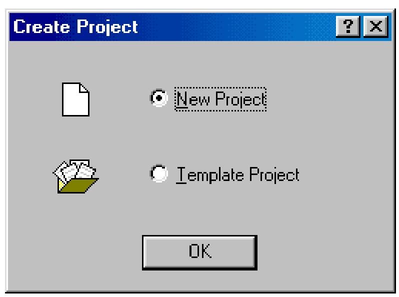
Creating a New Project

To create a new project:

1. On the Windows taskbar, click **Start**.
2. Select TurboProject|TurboProject v.4.
   The initial screen opens.

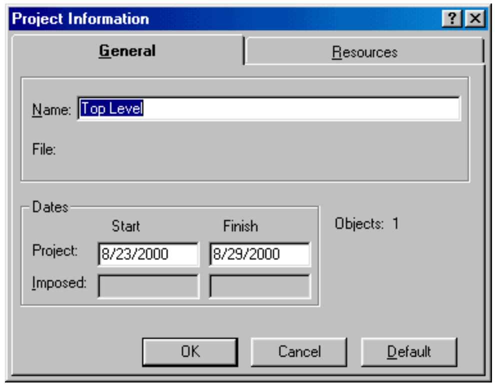
TurboProject Initial Screen

3. Click **New**.
   TurboProject starts, and the Create Project dialog box opens.



Create Project dialog box

4. Select **New Project**.
   The Project Information dialog box for your new project opens.



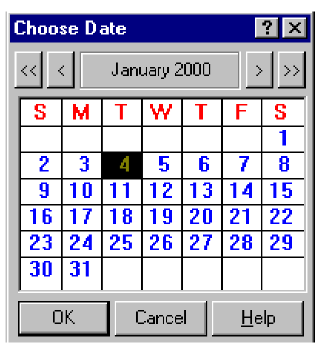
Project Information dialog box (TurboProject Express)

Entering Project Information

TurboProject allows you to enter key pieces of project information in the Project Information dialog box.

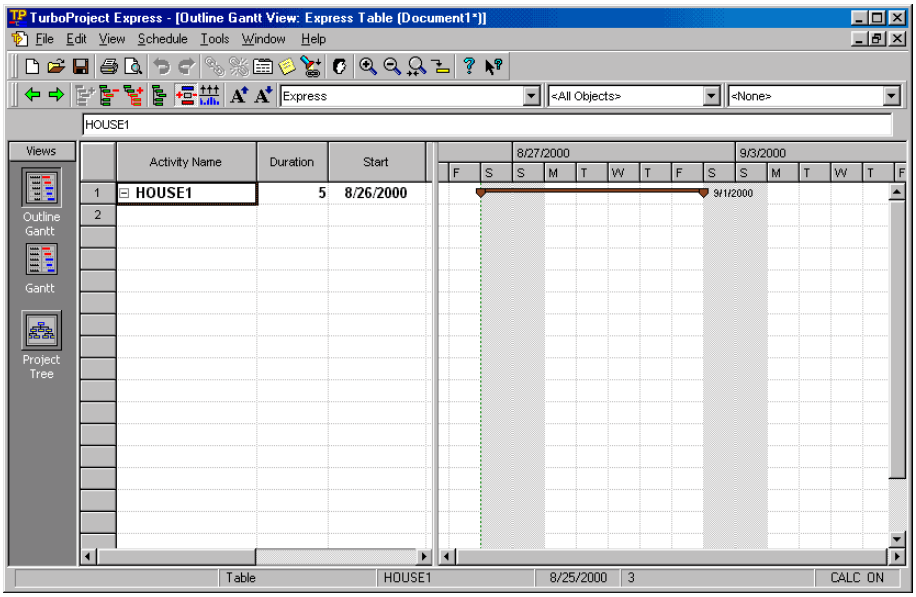
To enter project information:

1. In the **Name** box, replace the default name **Top Level** with the name of your project, or use **HOUSE1** as sample data.
2. Press <Tab> to move to the Dates group.
   The Project Start box displays the current system date.
3. Double-click the Project Start box to choose a different date.
   The Choose Date dialog box opens.



Choose Date dialog box

4. Select a start date from the calendar, and then click **OK**.
   The start date you selected is displayed in the Project Start box, and the Project Finish box displays the calculated finish date.
5. Click **OK** to save your changes and close the Project Information dialog box.



Outline Gantt View (TurboProject Express)

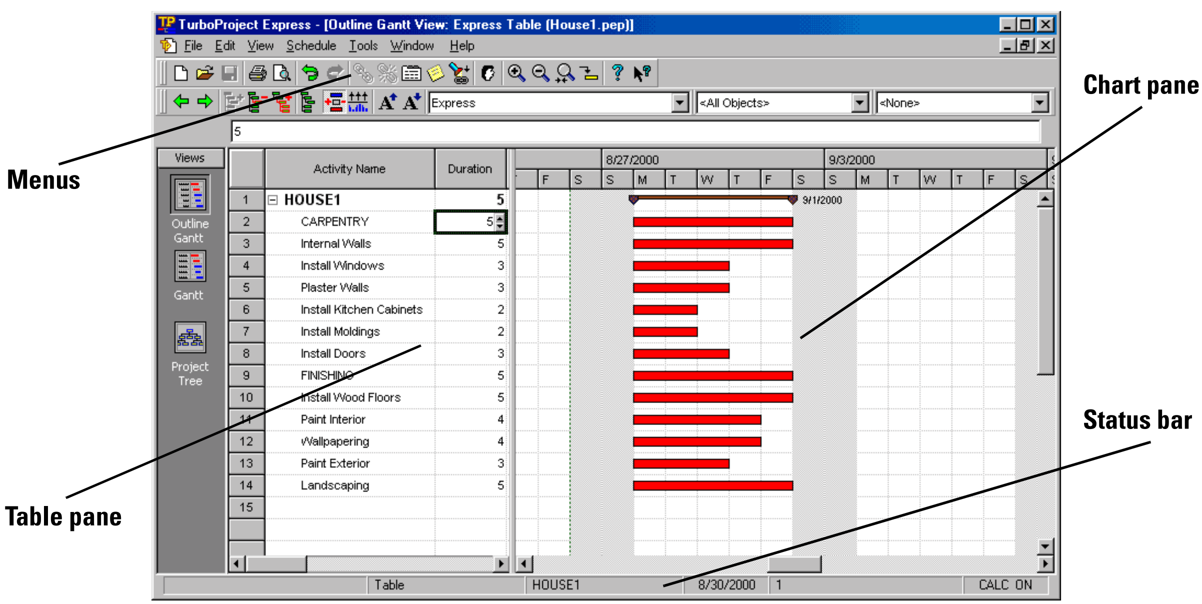
The chart pane of the default view displays a project bar in row 1. The start date of the project bar is the date you selected in step 4. The text you entered in the Name box in step 1 is displayed in row 1 of the table pane.

3

Adding Activities and Durations

Adding activities and durations in TurboProject is fast and easy, requiring you to enter a minimal amount of information. Before beginning this section of the tutorial, please take some time to familiarize yourself with the default view—the Outline Gantt view.

If you decided not to use the sample data provided, think about the activities in your own project, and the sequence in which you need to enter them.



Default View with Sample Information (TurboProject Express)

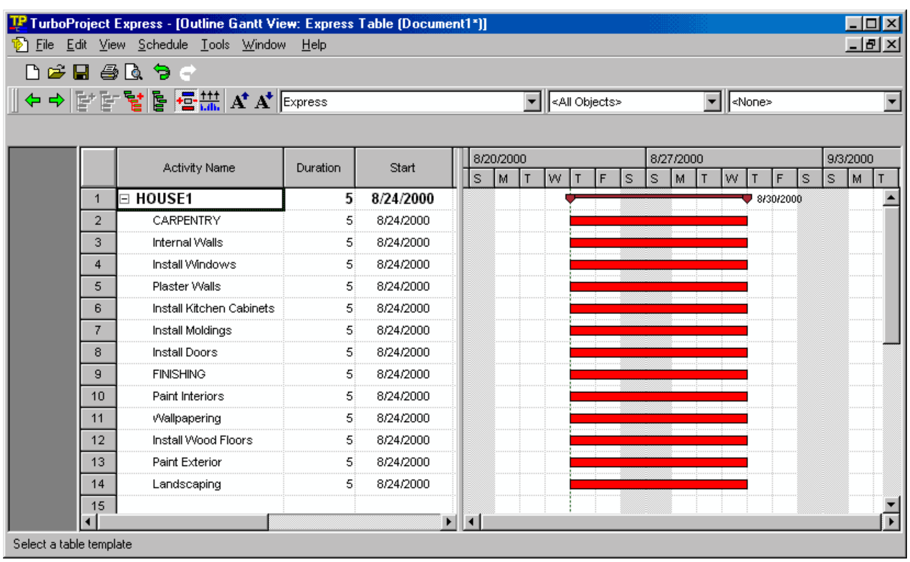
Adding Activities

To add activities:

1. Select the **Activity Name** field in row 2 of the table pane.
2. Type the name of your first activity in this field, or use the following sample data:

1.	CARPENTRY	8.	FINISHING
2.	Internal Walls	9.	Install Wood Floors
3.	Install Windows	10.	Paint Interior
4.	Plaster Walls	11.	Wallpapering
5.	Install Kitchen Cabinets	12.	Paint External
6.	Install Moldings	13.	Landscaping
7.	Install Doors		

3. Press <Enter>. A red bar appears in the Gantt chart on the right, and the pointer moves to the next row in the table.
4. Repeat steps 1 and 2 until you have entered all the activities.



Sample Data Activities Added

Setting Durations for the Activities

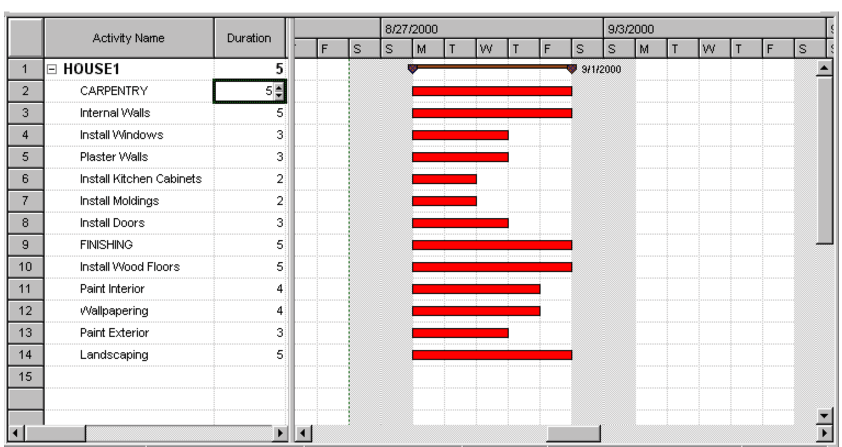
To set durations for the activities:

1. Select the **Duration** field of an activity in the Table pane.
2. Enter the duration for the selected activity. You can use your own data or the sample data provided.

1.	CARPENTRY	5 Days	8.	FINISHING	5 Days
2.	Internal Walls	5 Days	9.	Install Wood Floors	5 Days
3.	Install Windows	3 Days	10.	Paint Interior	4 Days
4.	Plaster Walls	3 Days	11.	Wallpapering	4 Days
5.	Install Kitchen Cabinets	2 Days	12.	Paint External	3 Days
6.	Install Moldings	2 Days	13.	Landscaping	5 Days
7.	Install Doors	3 Days			

3. Press <Enter> to move to the next activity in the table pane.
4. Repeat steps 1, 2, and 3 to assign durations to each of the activities.

TIP: If the Duration field is not visible, click on the vertical split bar and drag until the Duration column is displayed.



Sample Activity Durations

Editing Activities

Delete an Activity

To delete an activity:

1. In the table pane, select the activity you want to delete.
2. Select Edit|Delete, or press <Delete>.
3. Click **OK** to confirm that you do want to delete this activity.

TIP: *If you want to undo this action, select* Edit|Undo. *TurboProject has a multiple undo feature (default 20), so you can undo all your previous steps. If you undo more than you intended, you can reverse the process by selecting* Edit|Redo.

Move an Activity

To move an activity:

1. Press <Shift>, click and hold on the activity in the table pane. A small message box opens in the activity row.
2. Drag the activity to new location, then release the mouse button. The selected activity has been moved to a new row in the table.

Change the Duration of an Activity

To change the duration of an activity:

1. Select the **Duration** field of the activity in the table pane.
2. Type the new duration for the selected activity.

TIP: *You can also type a letter after the duration value,* ***W*** *for weeks (1W = 5 days),* ***M*** *for months (1 Month = 25 days),* ***Q*** *for quarters (1Q = 60 days). The value that will appear will be automatically converted to days using the values shown.*

Insert an Activity

To insert an activity:

1. In the table pane, select the row in which you want to insert a new activity.
2. Select Schedule|Add Planning Object|Activity, or press <Insert>. A new activity is inserted above the row you selected.

4

Creating Connections & Workflow

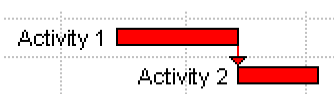
To tie your activities together to create a logical sequence of work, you need to create dependencies or connections between the activities. TurboProject allows you to make 3 different types of connections, creating the workflow that best suits your needs.

With your activities connected, TurboProject applies the Critical Path Method (CPM) to calculate the total duration of your project. Any changes, such as a delayed start of an activity, are automatically considered by TurboProject and a new project finish date is calculated.

Types of Connections

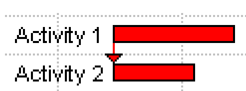
There are three types of workflow connections that you can make between planning objects.

Finish-to-start (FS)



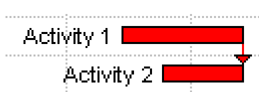
Finish-to-start connects the finish of one planning object to the start of another. A finish-to-start connection from Activity 1 to Activity 2 means that Activity 1 must finish before Activity 2 can start. Finish-to-start is the default connection type.

Start-to-start (SS)



Start-to-start connects the start of one planning object to the start of another. This connection is used to show that the second activity cannot start until the first activity has started.

Finish-to-finish (FF)

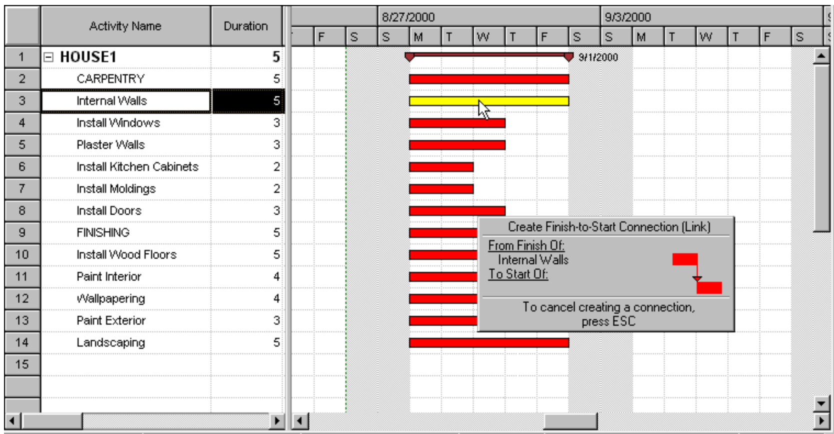


Finish-to-finish connects the finish of one planning object to the finish of another. This connection is used to show that the finish of the second activity is constrained by the finish of the first task. In other words, the second task cannot finish until the first task has finished.

Connecting Activities

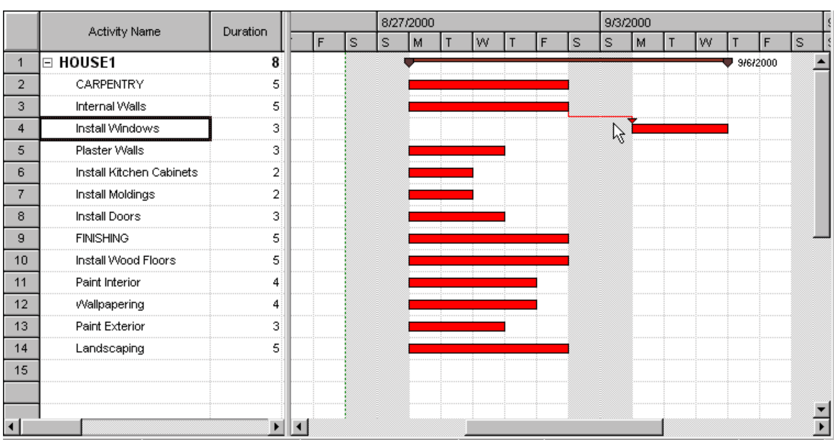
To connect two activities:

1. In the chart pane, click on the first activity, or predecessor. The pointer changes to , and a connection message is displayed.



Selecting First Activity

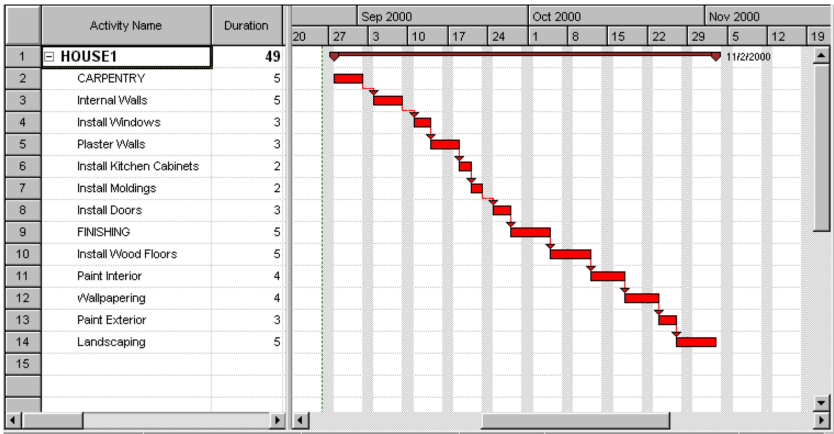
2. Click on the next activity, or successor. The two activities are now connected.



Connected Activities

3. Repeat steps 1 and 2 to connect all the activities.

TIP: You can select all of the activities in your project and, with the chain command, automatically connect them Finish to Start.



Chained Activities

TIP: Subprojects can be connected in the same way as activities.

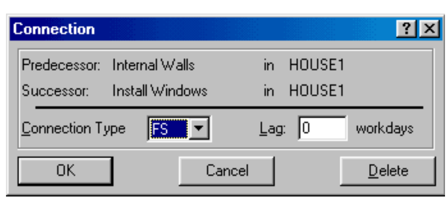
Editing and Deleting Connections

TurboProject allows you to change the connections between the planning objects in your project, adjusting the schedule to meet specific requirements.

Editing a Connection

To edit a connection:

1. In the chart pane, move the pointer over the connection you want to edit until it changes to a magnifying glass.
2. Double-click the connection. The Connection dialog box opens and the selected connection changes to yellow.



Connection dialog box

3. In the Connection Type list, select SS. This will change the connection to Start-to-Start.
4. Click **OK**.

Deleting a Connection

To delete a connection:

1. In the chart pane, move the pointer over the connection you want to delete until it changes to a magnifying glass.
2. Double-click the connection. The Connection dialog box opens and the selected connection changes to yellow.
3. Click **Delete**. The Connection dialog closes and the connection is deleted.

TIP: *If you want to undo this action, select* Edit|Undo. *TurboProject has a multiple undo feature (the default is 20), so you can undo all your previous steps. If you undo more than you intended, you can reverse the process by selecting* Edit|Redo.

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Assigning Resources to Activities

Now that you've entered estimated durations and created logical relationships between the activities in your project, the next step is to allocate resources to your schedule. Before you can assign resources to activities, you must create a list of the resources that are available to perform the work.

Resources can be individuals, groups of people, or even materials, equipment, and services. You need to think about your project and include in the Resource List everything that is required to get the work done.

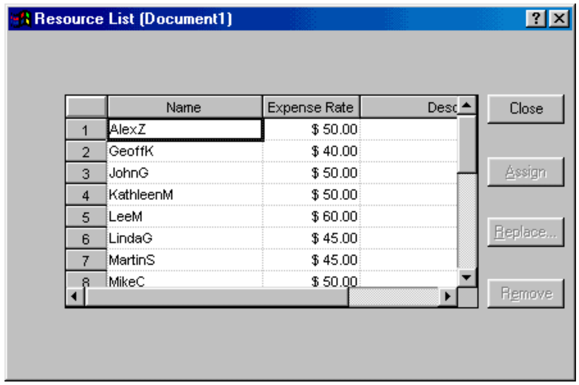
Creating a Resource List

To create a Resource List:

1. Select View|Open Resource List. The Resource List opens, with **Project Resources** in the top level of the table.
2. Under the **Name** heading in row 2, type the name of the first resource available to work on your project, or type the first name in the sample data.

No.	Name	Expense Rate	No.	Name	Expense Rate
1.	MikeC	50	5.	AlexZ	50
2.	JohnG	50	6.	LindaG	45
3.	LeeM	60	7.	GeoffK	40
4.	KathleenM	50	8.	MartinS	45

3. Press <Enter>. The pointer moves to the next row, and the list is automatically sorted alphabetically.
4. Under the **Expense Rate** heading in row 2, type an expense rate for the resource.
5. Select the **Name** field on the next row, and repeat steps 2, 3, and 4 to add all the resources.



Sample Resource List (TurboProject Express)

Assigning Resources

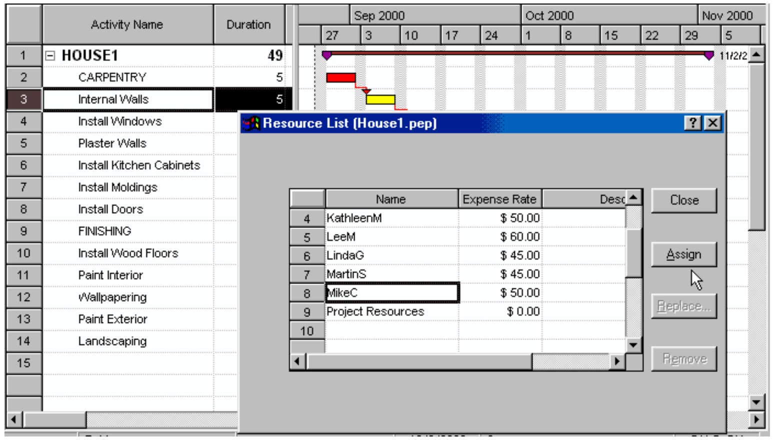
When you assign a resource to an activity, you specify the quantity of that resource required to accomplish the work. You can assign one or many resources, in any quantity, to a single activity or a selected group of activities.

To assign a resource to an activity:

1. Select View|Open Resource List.
2. In the table pane, select the activity to which you want to assign a resource. The corresponding bar in the chart pane changes to yellow. You can use your own data, or the sample data provided.

No.	Activity	Resource Name	No.	Activity	Resource Name
1.	Internal Walls	MikeC	7.	Install Wood Floors	LeeM
2.	Install Windows	JohnG	8.	Paint Interior	KathleenM
3.	Plaster Walls	AlexZ	9.	Wallpapering	GeoffK
4.	Install Kitchen Cabinets	MikeC	10.	Paint Exterior	KathleenM, LindaG
5.	Install Moldings	JohnG	11.	Landscaping	MartinS
6.	Install Doors	LeeM			

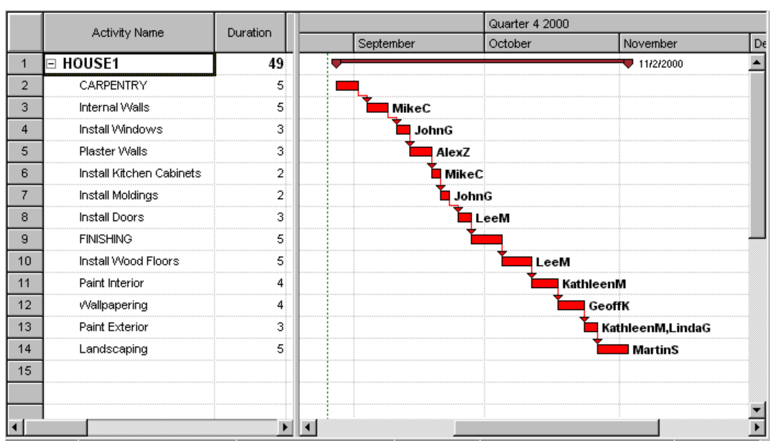
3. With the activity selected, move the pointer to the Resource List dialog box and select the resource you want to assign to the activity.



Assigning Resources

4. Click **Assign**.
5. Repeat steps 2, 3, and 4 to assign all the resources to the project.
6. Click **Close**.

The project is updated with the names of the assigned resources displayed in the chart pane of the project view.



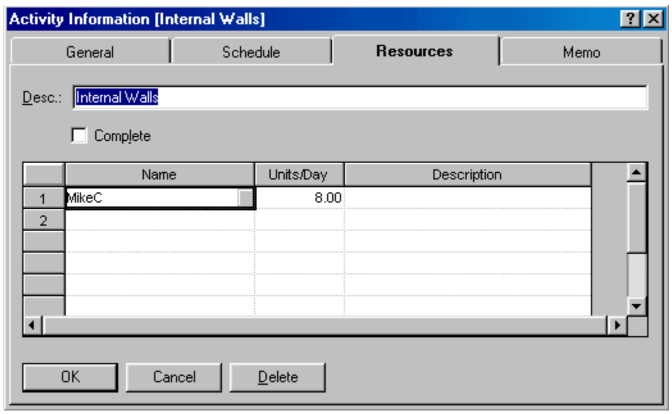
Assigned Resources

NOTE: You cannot assign resources to activities until you have first entered them in the Resource List. Also, resources cannot be assigned to subprojects or events.

Removing Resource Assignments

To remove a resource assignment:

1. In the table pane, select the activity from which you want to remove the resource.
2. Select Edit|Edit Resources. The Resources tab of the Activity Information dialog box opens, displaying a table of resources assigned to the selected activity.



Activity Information dialog box

3. Select the resource you want to remove, and then click **Delete**.
4. A dialog box opens, prompting you to confirm that you want to delete the resource assignment. Click **Yes**.
5. Click **OK** to close the Activity Information dialog box and accept your changes.

TIP: *If you want to undo this action, select* Edit|Undo. *TurboProject has a multiple undo feature (the default is 20), so you can undo all your previous steps. If you undo more than you intended, you can reverse the process by selecting* Edit|Redo.

6

Organizing Your Project

Do I Need to Organize My Activities?

Depending on the size of your project, it can be very helpful to organize the work into phases or groups of activities that have something in common.

You should outline your project if the following conditions apply:

- You have 20 or more activities
- You require a hierarchical structure, and need to manage phases of the workflow
- You would like to produce reports that show summaries, as well as detailed views of your project
- You would like to be able to locate each phase instantly, using the Project Tree
- You want to distribute and integrate individual subprojects (TurboProject Professional only)

Outlining Your Project

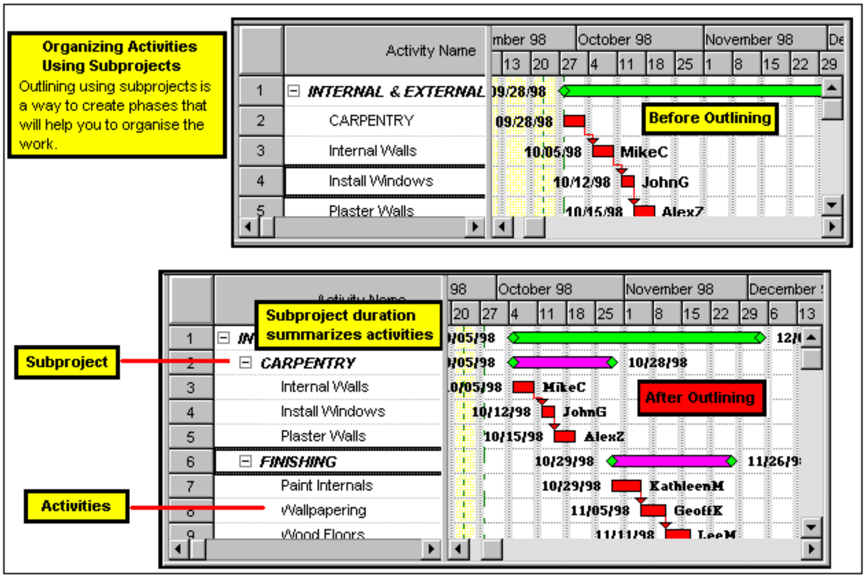
Once you decide what phases will logically group activities in your project, you need to create a new planning object called a Subproject to summarize the schedule for each phase.

When you create a subproject, the subproject bar will summarize all the sub-activities indented below it, and the bar will reflect the start and finish dates for the phase. Any changes you make to the activities in the subproject will be automatically reflected in the subproject bar.

Creating Subprojects and Summarizing Phases

It is important, when you create your first outline, that you understand the terms Indent and Outdent. These are the commands you will use to create subprojects or project phases. To summarize the schedule for activities that make up a phase of the project, you must indent, or push to the right, all activities whose schedules are summarized by the subproject that owns them. If you then outdent any of these activities, you are instructing TurboProject not to include them in the phase.

By default, the subproject will ignore these outdented activities when the schedule for this particular project phase is calculated.



Outlining Your Project

Inserting an Activity to Summarize a Phase

If you are using your own data, you must insert an activity that will summarize a phase in your project. If you are using the sample data, CARPENTRY and FINISHING are the subjects you will use.

To insert an activity to summarize a phase:

1. Select the row where you want the new activity to appear.
2. Select Edit|Insert. A new activity appears in row 2.
3. In the **Activity Name** field, enter the name that describes this phase of your project.
4. Repeat steps 2 and 3 to add activities for each of the phases in your project.

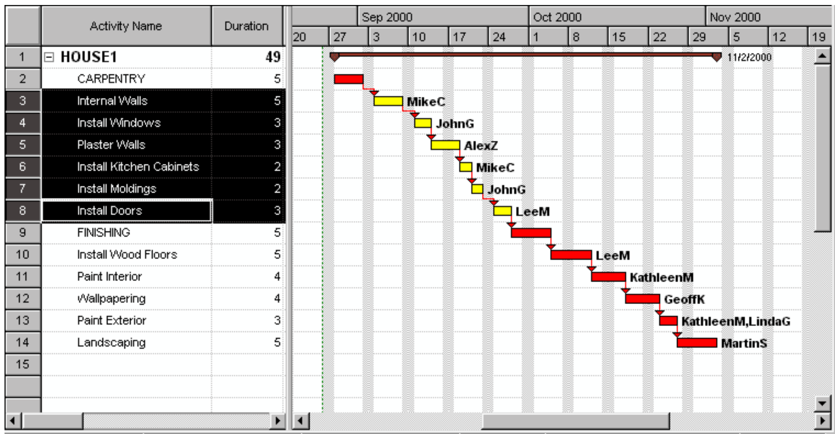
Indenting and Summarizing Phases

Now you've inserted a planning object that will summarize a phase of work in your project, you must select the activities to be included in the subproject.

To select activities to be summarized:

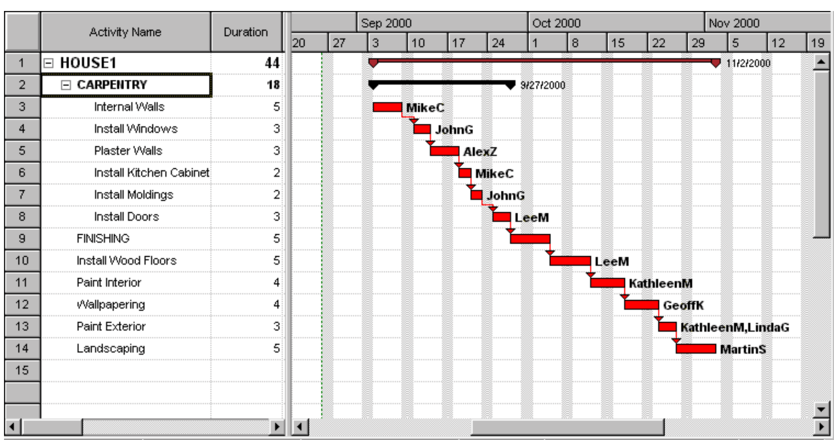
1. Select the first activity to be summarized.

2. Press <Ctrl>, click, hold, and drag the pointer down over the other activities to be selected, then release.
   The activities you selected will be highlighted in black. Make sure you have not selected the activity that you inserted to summarize the phase. (If you are using the sample data, to not select CARPENTRY.) These activities will be automatically converted to subprojects once step 2 has been completed.



Selecting Activities to be Grouped

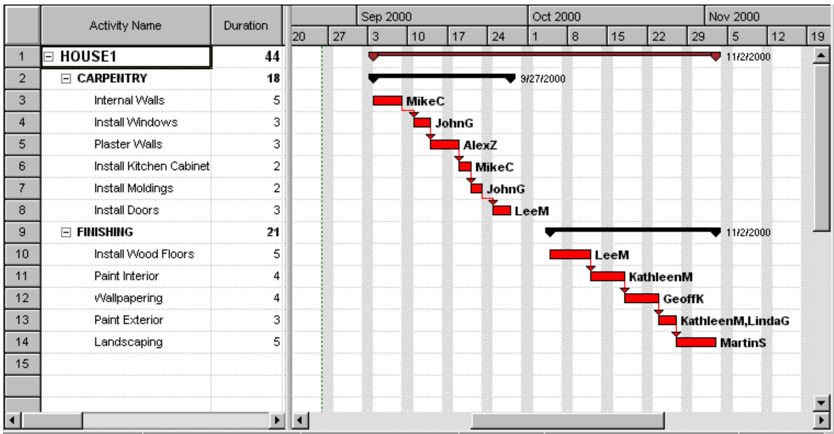
3. Select View|Indent, or click  on the Formatting toolbar.
   The activities you selected move to the right, and the activity immediately above this group is automatically converted to a subproject. A corresponding bar appears in the chart pane.



Grouped Activities

4. Repeat steps 1, 2, and 3 to create subprojects for the other phases you have identified in your project, or continue using the sample data.

When you are finished grouping the activities, you will have a subproject and corresponding bar for each phase of the project.



New Subprojects

7

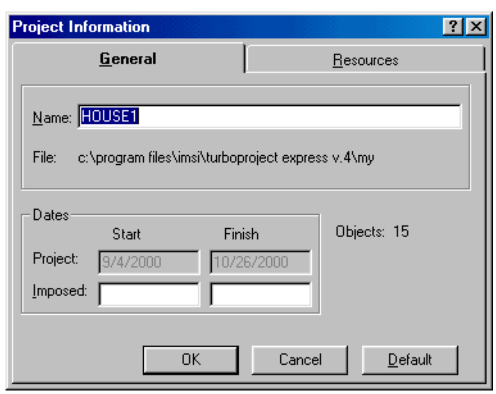
Reviewing the Schedule

You have reached an important milestone in the creation and organization of your project. Now that you've added the required planning objects to your project, and made the necessary connections and resource allocations, you must review the schedule, looking for errors, inconsistencies, and areas that can be improved.

Viewing the Project Schedule

To view the project schedule:

1. Select Tools|Project Information. The Project Information dialog box opens.
2. Select the General tab.
   Under **Dates**, you can see the current start and finish dates for your project. Notice that you cannot edit this information.



Project Information dialog box (TurboProject Express)

3. Click **OK** to close the dialog box.

Balancing Your Schedule

If the finish date displayed in the Project Information dialog box is later than you are willing to accept, you must decide what changes can be made to achieve an acceptable finish date.

- You can shorten the duration of selected activities by assigning additional resources and completing the work sooner.
- You can attempt to shorten the duration of an activity, where the duration you estimated is overly optimistic.
- You may have no alternative but to accept the calculated finish date.

This process is called balancing and should be performed periodically.

You will notice, there is a direct connection between time and resources to the extent that a project's completion date will be affected if the following apply:

- You have insufficient resources to carry out the work
- The duration of specific activities cannot be shortened. (In this situation, assigning additional resources would have no affect in getting the work completed more quickly.)

To assist you with the task of balancing your schedule, TurboProject offers a number of tools to help you to achieve a realistic solution. As you become more familiar with using TurboProject, you will start to realize the power that is available for addressing this problem.

8

Monitoring Your Progress

Now that you've completed the planning stage and have a final project plan, you can save a copy of your plan for future reference, and use it to monitor the progress of your project. This baseline or original plan is used to compare actual performance with planned performance.

The work begins on the project, changes and revisions are made to the plan, and TurboProject recalculates the schedule. As work progresses, you may have to modify the plan to respond to changing circumstances or to include of new information. You make these adjustments, record actual dates, update the status, and TurboProject again recalculates the remaining schedule.

As you can see, monitoring the progress of your project is a cyclical process in which the schedule evolves. As progress is made, the schedule is continually revised and recalculated.

Establishing the Baseline

The baseline is a snapshot of your project. You can capture and store the current schedule of planning objects in your plan for a particular date. Once you set a baseline, the plan dates are displayed in the in the Planning Object Information dialog box. The baseline schedule is also displayed in the planning view.

When you update the status of your project, you will see the difference between the baseline schedule (planned performance) and the current status (actual performance).

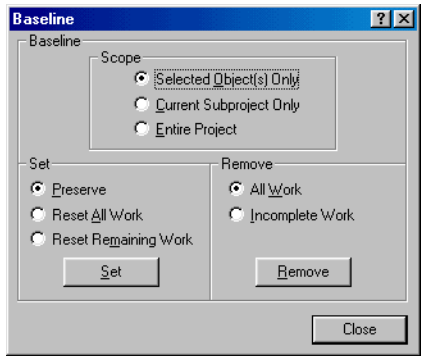
Setting a Baseline

You can set a baseline for your project at any point—before work begins, or as the work progresses. Set a baseline for the entire project, planning objects located in the current subproject, or selected planning objects only.

To set a baseline for the entire project:

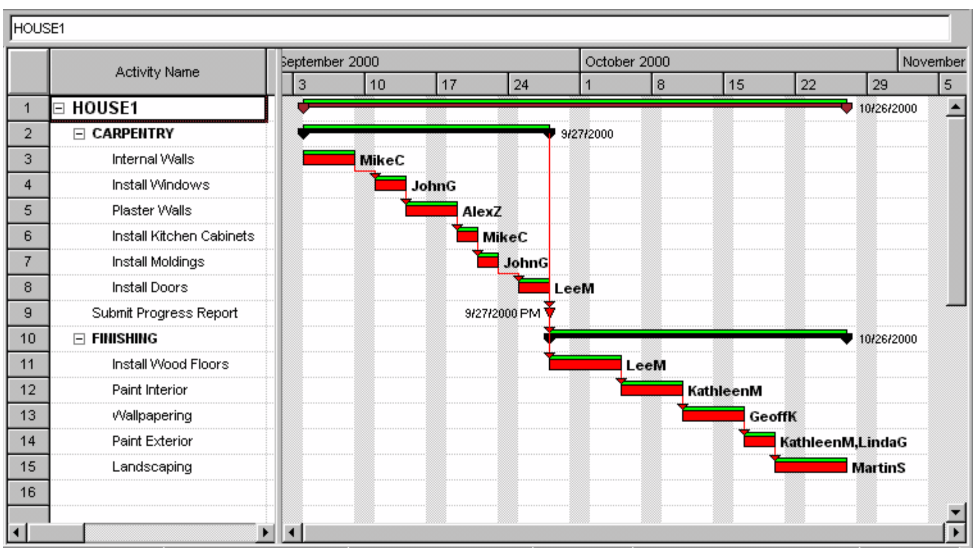
1. Select the top level in the table view.
2. Select Schedule|Baseline.

The Baseline dialog box opens.



Baseline dialog box

3. In the **Scope** group, select **Entire Project**.
4. In the **Set** group, select the desired option.
5. Click **Set**. A message box appears, confirming that the baselining has taken place.
6. Click **OK**.
   The baseline schedule is displayed in the Project View.



Baseline for the Entire Project

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Viewing and Navigating Your Project

As you work with TurboProject, adding activities and creating connections, your project may grow larger than the view. You can use the time scale in TurboProject to adjust the view of your project, allowing you to see as much, or as little as you require.

To view the entire project:

1. Select any field in row 1 of the table pane.
2. Select View|Time Scale|Zoom Project, or click on the Standard toolbar.
   The project view displays the entire duration of your project in the chart pane.

TIP: You can also expand and compress the time scale by clicking and on the Standard toolbar. If you position the project in the center of the chart pane, it will expand and compress around the center of the pane without it disappearing off screen.

Navigating Your Project

Now that you have created a project and watched it grow in size and complexity, you can examine the project hierarchy and its corresponding detail. TurboProject allows you to go to where you want, when you want to in your project using the Project Tree.

The Project Tree is a hierarchical road map that graphically displays the structure of your project. The project tree is displayed as an outline in the project tree pane in all of TurboProject's planning views (Outline Gantt/Profile, Outline Gantt, Gantt, and Network views).

The indentation of the subprojects within the project tree indicates their child–parent relationship and how planning objects fit within groupings of subprojects. Each node of the project tree represents a subproject or a phase of the project.

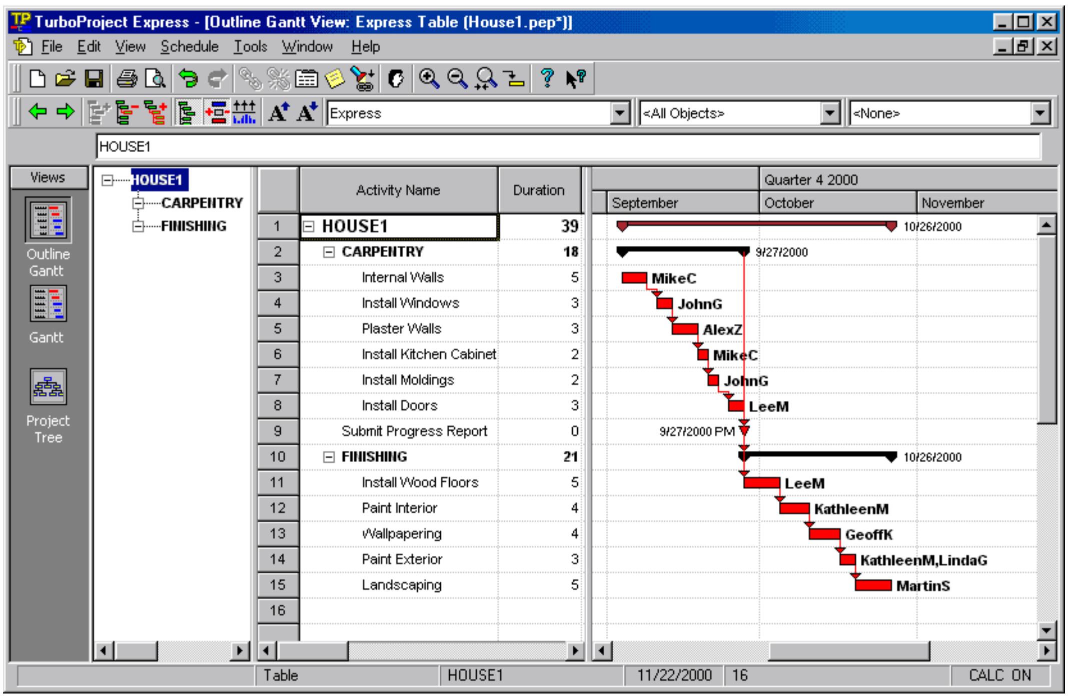
As you build your project and create subprojects and phases, TurboProject updates the tree structure of your project.

Displaying and Hiding the Project Tree

When you first start TurboProject, the Project Tree pane is not displayed. As you build your project, creating subprojects or phases, TurboProject builds the tree structure.

To show or hide the Project Tree:

1. Select View|Project Tree|Show/Hide Project Tree. The Project Tree is displayed in its own pane, to the left of the table pane.



Sample Project Tree (TurboProject Express)

2. Repeat step 1 to hide the Project Tree.

TIP: You can also show or hide the Project Tree by clicking on the Standard toolbar.

Controlling What You See

The Project Tree allows you to quickly locate the phases of your project, as well as expand and collapse the project hierarchy. You can collapse the entire project to view only the top level project bar, or you can expand to the next level and show all planning objects at second level of the project structure.

To expand the view of your project:

1. Select the project bar in row 1 of the table pane.
2. Select View|Project Tree|Expand All.
   The view now displays your entire project, and the Project Tree pane has expanded to show all phases of your project including activities.

Viewing Subprojects

Depending on the size of the project, you may have phases (subprojects) that are not visible in the table or chart panes. Using the Project Tree, you can navigate to a subproject and view the detail.

To view one phase of your project:

- Select the name of the phase in the Project Tree pane.
  The project view displays the phase in the top row of the table pane.

To return to the top of your project:

- Click on the project name at the top of the project tree.
  The project view displays the project bar as the first record in the table pane.

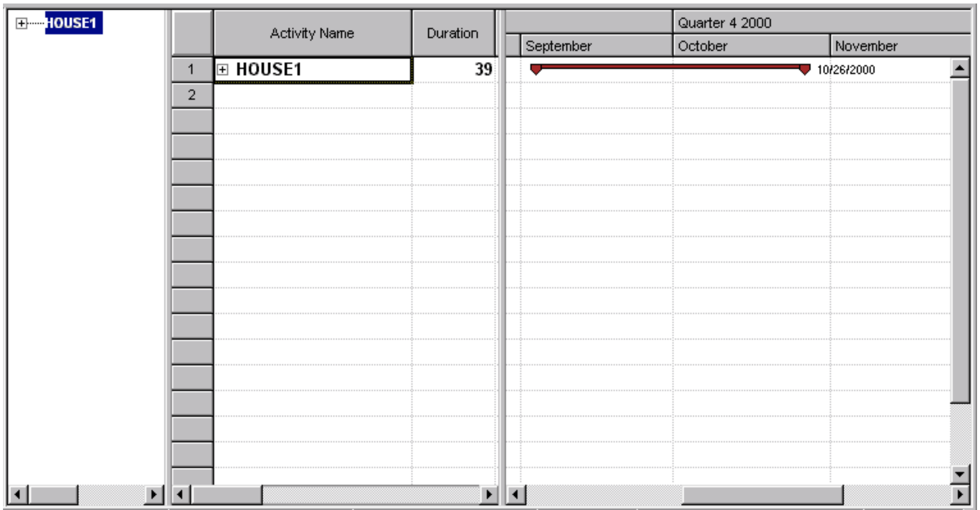
Collapsing and Expanding the Entire Project

To collapse the entire project:

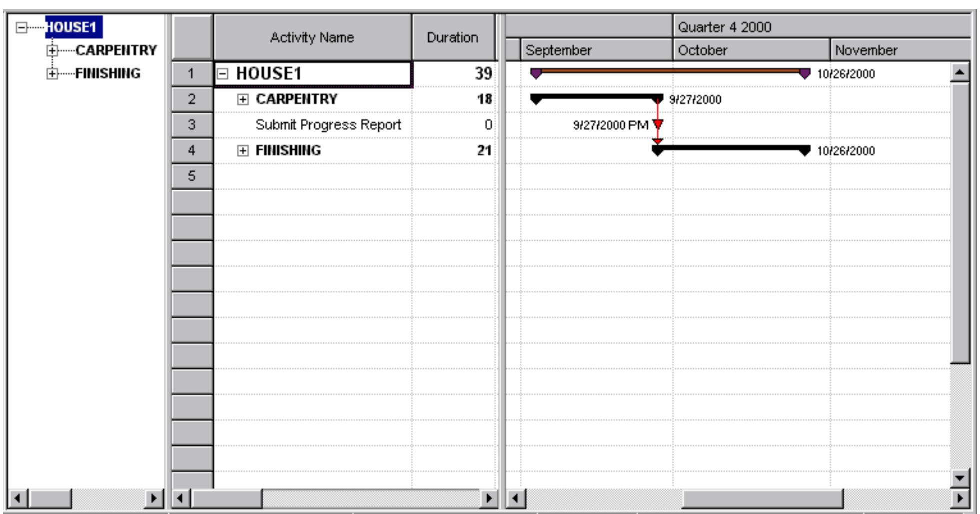
- Click on "-" to the left of the project name in the Project Tree pane.
  The project view collapses to display a single bar.

To expand the entire project:

- Click on "+" to the left of the project name in the Project Tree pane.
  The project view expands to display the project bar, as well as the subproject bars.



Sample Collapsed Project (TurboProject Express)



Sample Expanded Project (TurboProject Express)

We suggest that you spend sometime familiarizing yourself with this feature and you will soon begin to appreciate the power and flexibility it provides.

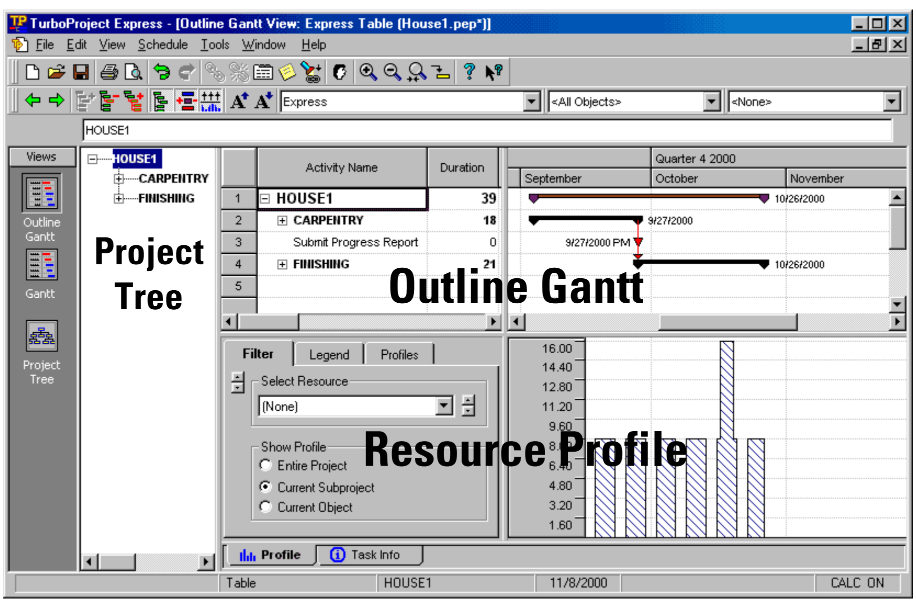
10

Viewing Resource Assignments

Once you have assigned resources and expenses (TurboProject Professional only) to the activities in your project, you can view the levels of assignment or usages.

To display the resource usages:

1. Select View|Change Active View|Outline Gantt View. The Outline Gantt view opens.
2. Click on the Formatting toolbar. The project view now consists of the Outline Gantt in the upper portion, and the resource profiles in the lower portion.
3. Click on the Formatting toolbar.
   The Project Tree opens, allowing you to easily navigate the project.



Sample Outline Gantt/ Profile view (TurboProject Express)

The Resource Profile view displays a profile for all usages assigned to your project. In TurboProject and TurboProject Professional, both cumulative and non-cumulative values are displayed in the histogram. In TurboProject Express, only the non-cumulative values are displayed.

You can use the Project Tree to control the information displayed in the Profile view. For example, if you select the top level of the Project Tree, the profile includes resource usage information about the entire project. If you select a subproject or phase in the Project Tree, the profile only includes resource usage information for the selected subproject.

In the Profile view, the Legend tab displays the cumulative and non-cumulative values for a specific point on the profile. As you move the pointer over the profile, these values change to reflect the position of the pointer. You can use this feature to examine the resource usage at a particular point on the curve.

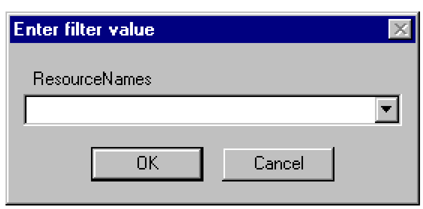
Filtering the Resource Profile

(TurboProject and TurboProject Professional only)

The resource profile is a powerful feature in TurboProject, since it allows you to filter the information displayed. For example, you can filter the profile to display only usage information for a specific resource, or group of resources.

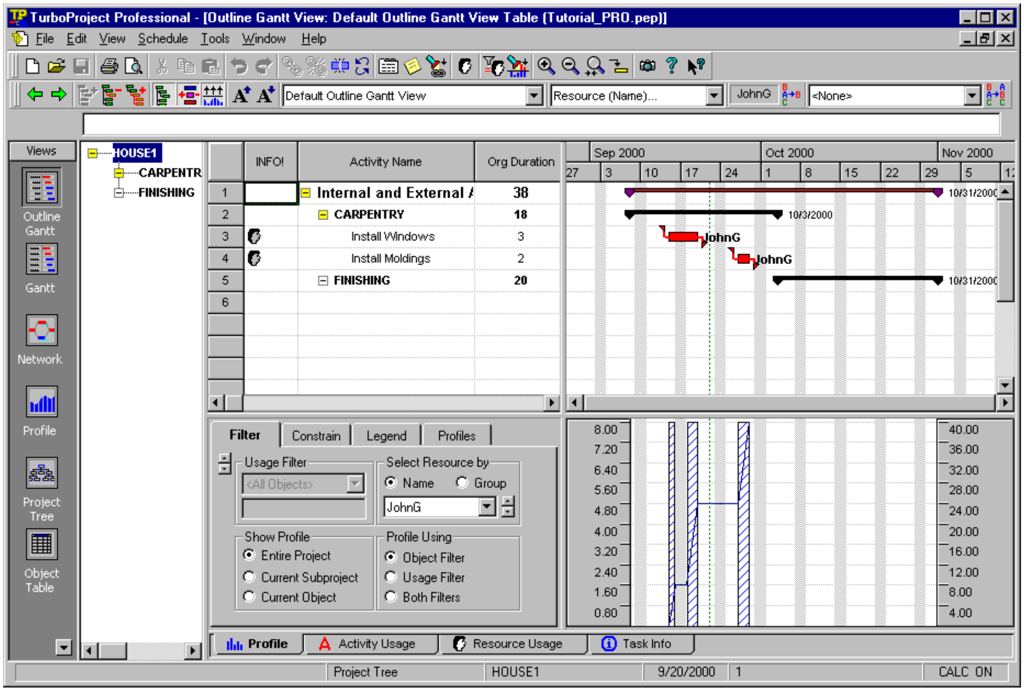
To filter the resource profile:

1. Make sure that the combined Outline Gantt/Profile view is the active view.
2. Select the name of your project in row 1 and click  on the Formatting toolbar.
   Your entire project will be displayed in the table and chart panes.
3. Click anywhere on the table pane and select View|Filter.
   The Select a Filter dialog box opens.
4. Select **Resource (Name)**, then click **Apply.**
   The *Enter filter value* dialog is displayed.



Enter Filter Value dialog box

5. Select a resource from the drop-down list, and click **OK**.
   The profile refreshes to display the usage profile for the selected resource, and the selected filter is displayed to the right of the Filter Box in the Formatting toolbar.



Filtered Resource Profile (TurboProject Professional)

TIP: You can also apply a filter by selecting it from the drop-down list in the Filter box on the Formatting toolbar. To remove the filter, select **None** *from the drop-down list. The profile refreshes to display the usages for your entire project.*

Resource Overallocations

(TurboProject Professional version only)

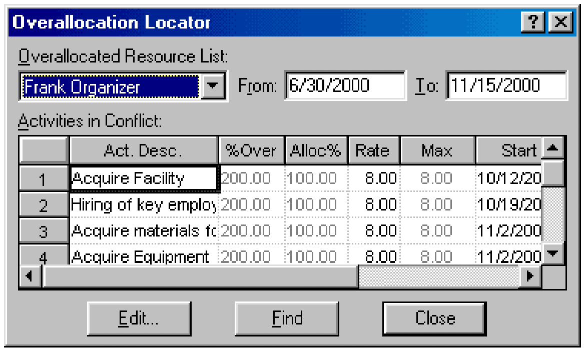
When a resource is allocated at a rate higher than its maximum availability, this is referred to as resource overallocation.

The Overallocation Locator dialog box allows you to quickly locate, view, and change the parameters of the planning objects with overallocated resources.

To open the Overallocation Locator dialog box:

- Select Schedule|Overallocation Locator, or click on the Standard toolbar.

The Overallocation Locator displays a list of activities that cause assignment conflicts for the resources selected in the Overallocated Resource List. If the profile pane of the current view is open, the profile will automatically refresh to display a profile for the resource name displayed in the overallocated resource list.



Overallocation Locator dialog box (TurboProject Professional)

The Overallocated Resource List allows you select from a list a resource that is currently overallocated in your project. As each resource is selected, the activities in conflict are automatically displayed in the Activities in Conflict table.

Two data entry fields, From and To, are used to determine the time range over which TurboProject will search for activities contributing to the selected resources overallocation.

The Activities in Conflict table displays key information on the activities that cause overallocation for the selected resource.

The Edit button opens the Activity Information dialog box for the activity selected in the Activities in Conflict table.

Use the Find button whenever you need to find the activity selected in the Activities in Conflict table in the current active view (Outline Gantt, Network, Profile, etc.). When you use the Find button, the active view refreshes to display the selected activity that is highlighted both in the view and table panes of Gantt or Outline Gantt.

11

Printing, Reporting, and Saving Project Information

After you've finished planning your project, you need to communicate the project information to different people. TurboProject allows you to print both views and reports of your project. But as the people involved in the project have their own concerns and interests, they may need some specific information. For instance, the accountants may only require the cost information. TurboProject accommodates such requirements by providing you with a variety of standard report templates.

TurboProject provides you with the following options for printing and reporting your project information:

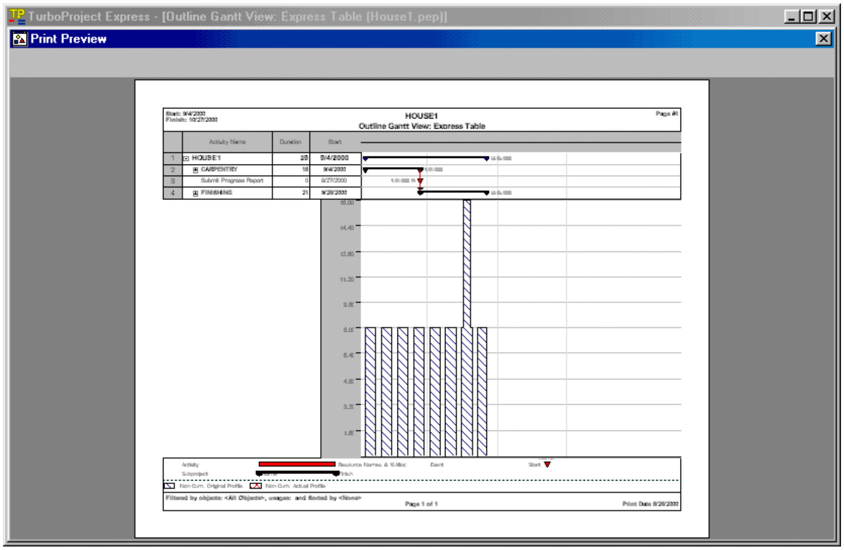
- Print the project views by clicking the Print button or print some specific information by using the standard report templates. You can also customize the reports by applying different filters
- Change the visual appearance of the reports by modifying the headers and footers
- Either print the information or send it by email to a particular person or group

Previewing and Printing Project Information

TurboProject provides you with an extremely flexible preview and printing option that allows you to create high quality output of different views of your project data. You can quickly tailor the standard views, printing only selected data, or data for a specific date range.

To preview your project:

1. Select View|Change Active View|Outline Gantt view.
2. Click on the Formatting toolbar to display the Profile view.
3. Select File|Print Preview. A preview of your project is displayed.



Print Preview (TurboProject Express)

4. If your project prints over more than one page, click on the Print Preview toolbar to display two pages side-by-side.

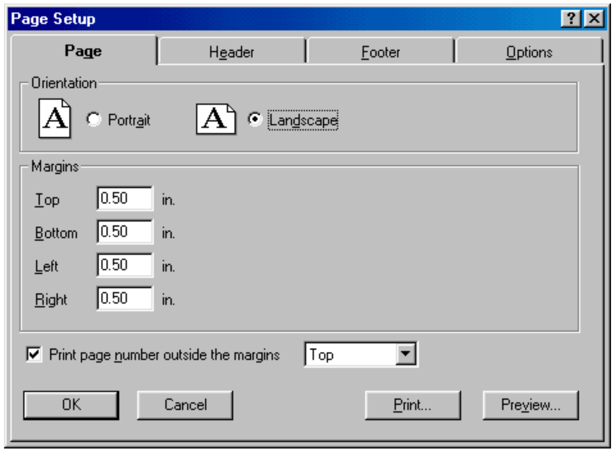
5. If you want to zoom in on a portion of the preview screen, select the area using the magnifying glass pointer. Click once and the area you have selected is magnified. Repeat the action to return the page to its default size.

Now that you have previewed your first project, you may want to make some adjustments. You can display additional columns in the table pane, or adjust the time scale so that the project will print on one page.

To adjust the view of your project:

1. Click **Close** to close the Print Preview window.
2. If you want to adjust the columns, move the pointer over the vertical split line between the table pane and the chart pane.
3. Click and drag the divider until the columns you want to preview are displayed.
4. Adjust the time scale by clicking or on the Standard toolbar.
5. Select File|Print Preview to preview the adjusted view.
6. Click on the Print Preview toolbar to change the orientation of the preview from landscape to portrait.

The Page Setup dialog box opens.

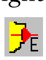


Page Setup dialog box (TurboProject Express)

7. Select the Page tab and in the Orientation group, select the **Portrait** option.
8. Click **OK**.
   The Print Preview window opens displaying your view in landscape orientation.
9. If you are connected to a printer, click  on the Standard toolbar.
   The Print dialog box opens.
10. Click **OK**.

Sending Project Information via Email

To export or send a report via e-mail:

1. Select Tools|Reports.
   The Select Report to Print dialog box opens.
2. Highlight the report in the Report Request List and click **Print Preview**.
3. Click  on the Report Preview toolbar.
4. In the **Format** list box, choose the format you want to export the report in.
5. In the **Destination** list box choose a desired destination for the report.
6. Click **OK** to confirm your selection and complete the final steps to save the report to a file or attach it to the e-mail message.

Saving Your Project

Now that you've created your first project, you must save it to a file.

To save a new project:

1. Select File|Save As. The Save As dialog box opens.
2. In the **File Name** box, type the file name for your project.
   Remember that the file name cannot exceed 8 characters. TurboProject automatically adds the file extension ".pep".
3. Click **OK**.

Closing Your Project

To close your project:

- Select File|Close.
  If you have made any changes since you last saved your project, you will be prompted to save the changes now.

To exit TurboProject:

- Select File|Exit.

Congratulations! You've completed the tutorial and created the first of many projects using TurboProject.

To find out more information about TurboProject, refer to the online Help or onscreen User Guide, or visit www.turboproject.com.

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