# Project Libre™
### CLOUD EDITION

# Cloud User Guide

A STEP-BY-STEP GUIDE
Version 0.0.2

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# Project*Libre* Company Introduction

▶ [Click here for ProjectLibre's Company Introduction](#)

ProjectLibre is a cloud and open-source project management software company. The founders have been in the project software market since the mainframe computer days during innovation from IBM 3090 to Vax/VMS, DOS, Windows, and the release of the first internet project team solution. Cisco Systems and Sun Microsystems were key backers as the financial fundamentals of internet software were not feasible. However, to prove their technologies under-wrote the WebProject solution.

We are project management focused and Libre stands for "Freedom in the Cloud" and "Free on the Desktop."

There are two solutions:

- ProjectLibre Cloud (subscription based)
- ProjectLibre desktop (free and open source).

ProjectLibre Cloud is a team solution in the browser that builds upon the desktop version. ProjectLibre Cloud is a multi-user with role-based access. It is a multi-project solution in your browser that can share a common resource pool. The cloud solution creates projects in your browser or opens existing Microsoft Project files. ProjectLibre Cloud is designed for teams. If you are an individual project manager, we recommend the desktop solution. The Cloud solution currently has a 3-user minimum subscription requirement for team usage. This will be modified over time but currently ensures the user base is properly paid attention to.

ProjectLibre desktop is a free open-source software and the second most used project management software globally. ProjectLibre desktop has been downloaded over 5,600,000 times in 193+ countries and translated into 29 languages. ProjectLibre manages projects on all 7 continents including Antarctica! It is targeted at single projects and single-project managers. ProjectLibre Cloud is most suitable for organizations with multiple projects and teams of resources. Both can open existing project files from other project management software such as Microsoft Project. ProjectLibre can read and write Microsoft properly formatted XML project files. That includes Microsoft Project, Primavera as well as several other such software products.

# Project*Libre* Cloud Introduction

Click below for ProjectLibre Cloud's Introductory Video

[English](#)

[Spanish](#)

[Portuguese](#)

ProjectLibre Cloud is a multi-project management, team solution in the browser that builds upon the desktop single-user project management solution. It is role-based with permissions established for each role within the organization. Resources are assigned to the project along with their roles, and each resource will have access to the project based on their role such as Project Manager, Team Member, Administrator, and even Customers.

There are similarities with ProjectLibre Desktop in they share similar functionality:

- Gantt Chart
- Network Diagram
- Work Breakdown Structure ( WBS )
- Resource Pool (Cloud is for multiple projects)
- Project Usage Spreadsheet
- Reports

There are also differences as ProjectLibre Cloud is a team and multi-project solution:

- Dashboard of projects
- Portfolio of projects
- Calendar view of tasks

This User Guide will cover in-depth how to:

- Login
- Create a new project
- Create new users, roles, and project teams
- Create and assign resources and project team
- View dashboard and portfolio
- View reports and calendar and more!

# Project*Libre* QuickStart

Click below for ProjectLibre Cloud's Quickstart Video

[English](#)

[Portuguese - Brazilian](#)

[Spanish - Latin American](#)

[Spanish -Spain](#)

## Logging in to ProjectLibre Cloud

- Go to [cloud.projectlibre.com/cloud/login.html](#)
- Login in to your account (aee Figure 1)

ProjectLibre is a browser solution so you need to login at *[ProjectLibre Cloud Login](#)* with your user name and password. Once entered press "Sign in" and you will be directed to an empty dashboard.

**Figure 1**
*Login Page*
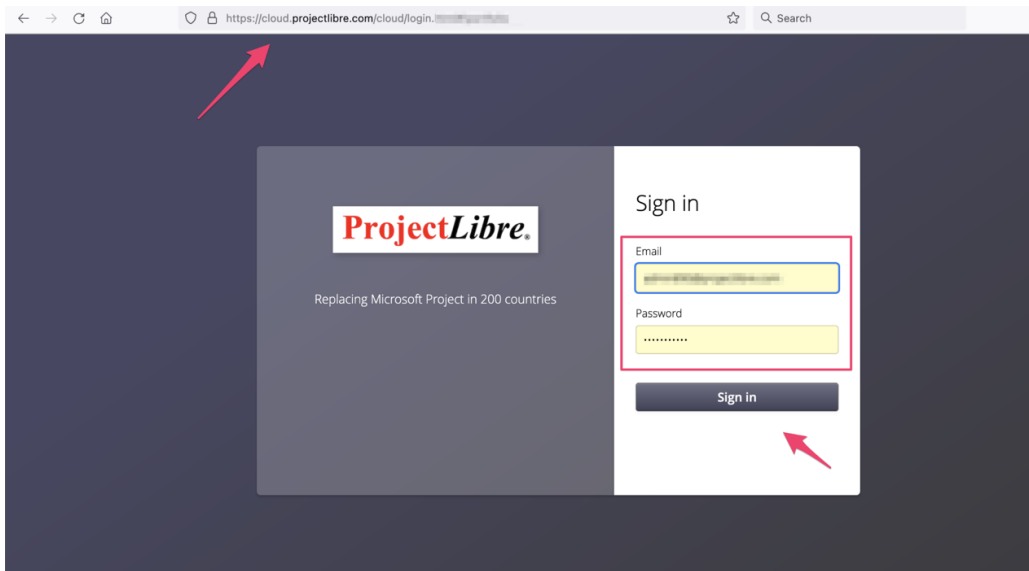


When you sign in, your default view will depend on your permissions. The first time you log in will be as the Administrator since you just signed up. The Administrator default login view will be the Portfolio view and will have a few sample projects since you have not created projects yet.

*Note:* If you are in another role such as Project Manager or Team Member, your landing page may differ when signing in.

# Creating a New Project

▶ [Click here for an introductory video showing how to create a project](#)

To create a new project, click on the Portfolio tab (see Figure 2), click in an empty row on the spreadsheet, then click the ✛ icon. Enter a name in the spreadsheet and then the Open Project icon 👁. *Note:* The project name can be changed later.

**Figure 2**
*Creating a New Project*



This opens up the Project View (see Figure 3) with the default view being the Gantt Chart.
The Gantt Chart and spreadsheet are empty and ready to add tasks.

**Figure 3**
*Project View*



Now you can get started on a project and enter tasks and durations in the spreadsheet. For example, you can enter a series of tasks and durations as shown:

| | |
|---|---|
| Design | *10 Days Duration* |
| Development | *10 Days Duration* |
| Document | *5 Days Duration* |
| Test | *10 Days Duration* |
| Rollout | *0 Days Duration, Milestone* |

# Project*Libre* in Your Browser

ProjectLibre Cloud is a browser-based solution that requires no plug-ins or download (see Figure 4). Simply enter:

- The registration provided URL.
- Enter your Username and Password.
- Then click Login.

You will be logged into ProjectLibre.  ProjectLibre Cloud will time out for security reasons so if left unattended will require logging in and returning to your previous session.

**Figure 4**
*Login Page*
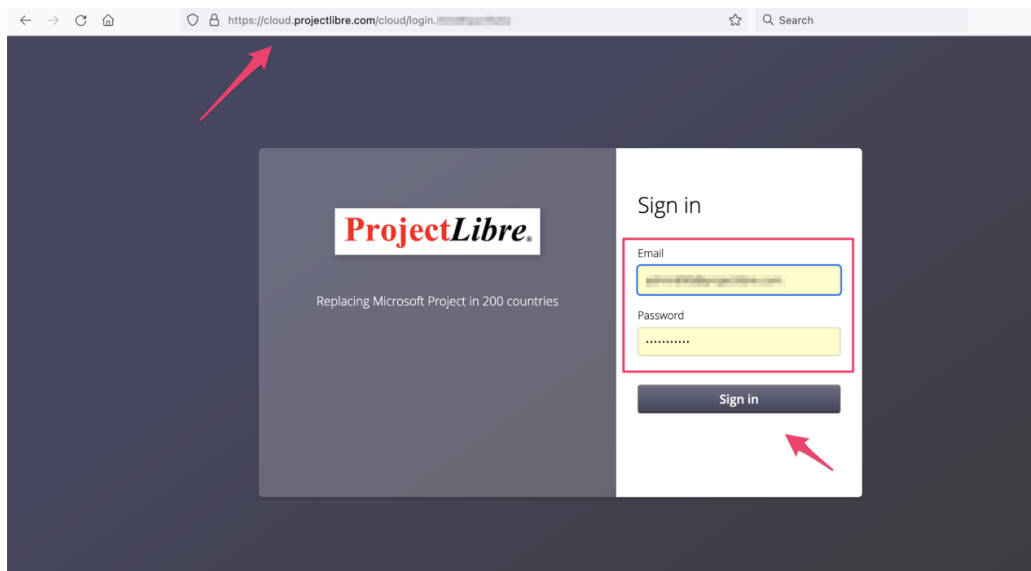


After logging into ProjectLibre, you can commence using ProjectLibre. You can also create users, establish roles, and manage company licensing by clicking on the hamburger menu button in the top far right of your browser window (see Figure 5). The options to modify in this area depend on the role you have when logging into ProjectLibre.

- Portfolio: List of projects, edit existing projects, or create new projects.
- Users: Create, edit, and associate with a resource.
- Roles: Create new roles or edit privileges on existing roles.
- Assign users with a role.
- Licenses: A new project and resources. You can also create new users as the administrator. This is done by selecting the hamburger button on the far right of the menu bar. There will be multiple options and clicking on the Admin option opens a dialog box to create users and roles (see Figure 6).
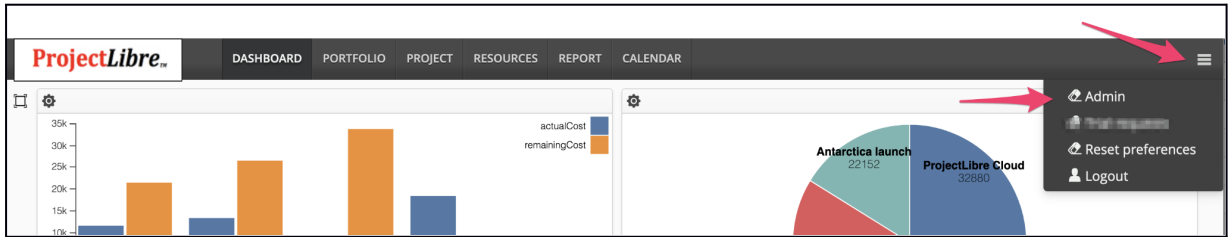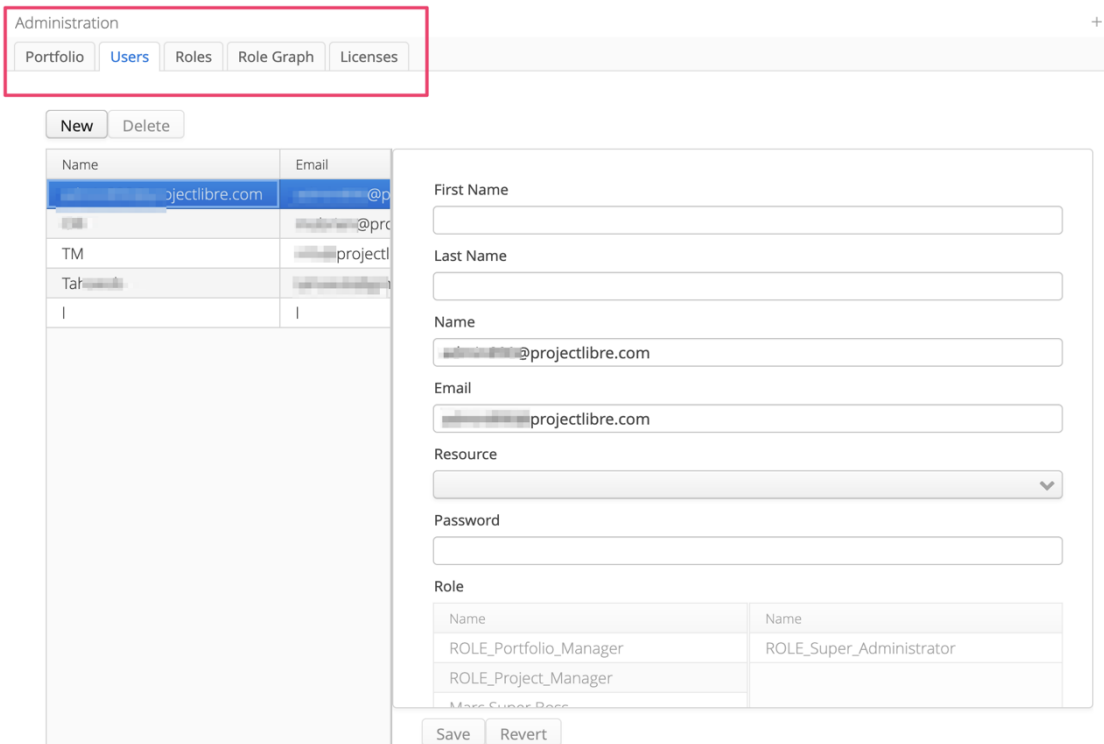
**Figure 5**

*Hamburger Icon*
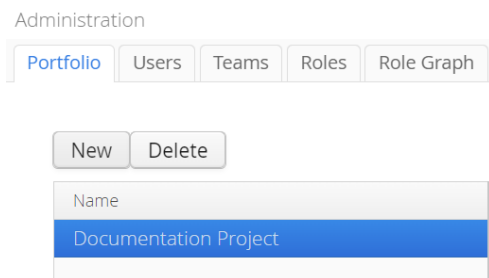


**Figure 6**

*Administration options*

# Administration

After selecting the Hamburger icon you have four Administration tab options. Selecting the Users tab allows for the creation of new users or editing existing users.

# Portfolio

The Administrator dialog box lists the projects which you have permissions to view (see Figure 7).
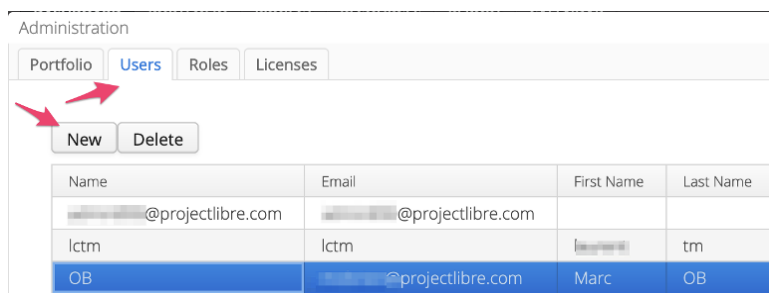
**Figure 7**
*Portfolio*



# New Users

Creating a new user is done in the Users tab by selecting New (see Figure 8). Enter the new user's first name, last name, name for logging in which can be different from their first/last name, email, and an initial password for the new user.

**Figure 8**
*New users*



An important part of creating new users is assigning them a role. You will see a list on the left and are able to select and drag it to the right. See Figure 9 on the next page for an example. We have clicked on the Role_PM (project manager role) and dragged it to the right as you can see. This user will have the permissions of the Project Manager. There is also Role_TM (Team member), Role_Admin (Administrator), and Role_SuperAdmin which is an administrator of all administrators.

**Figure 9**
*Assigning roles*



# Creating and Editing Roles
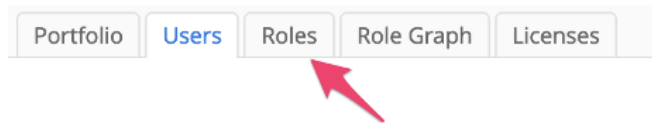


▶ [Click here for a video on creating roles, users, and teams](#)

An important administrative function is the creation of roles for your organization. ProjectLibre has pre-set roles to help you get started. These roles can be modified to conform to the security you wish for your organization.

The existing roles that are available by default are:
- Team Member
- Project Member
- Resource Manager
- Portfolio Manager
- Administrator
- Super Administrator

You can also create new roles. See Figure 10 on the next page as an example showing the project manager role along with the permissions allowed with this role. This includes which views can be displayed and/or edited.

**Figure 10**
*Project manager permissions*
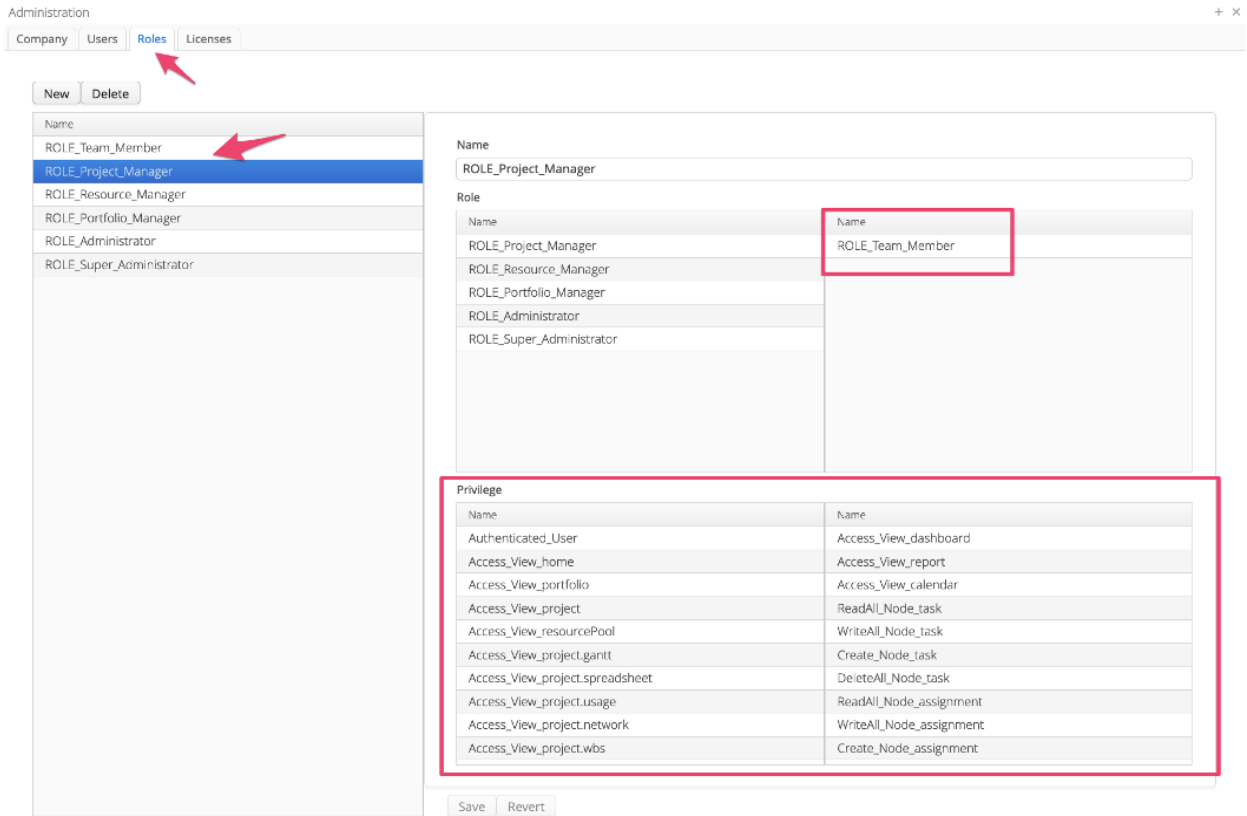


The roles give privileges on what to view and actions each role can take. Figure 11 is another view of a role created called Customer/Stakeholder. The role is created by selecting privileges and dragging them to the right.

**Figure 11**
*New role example*
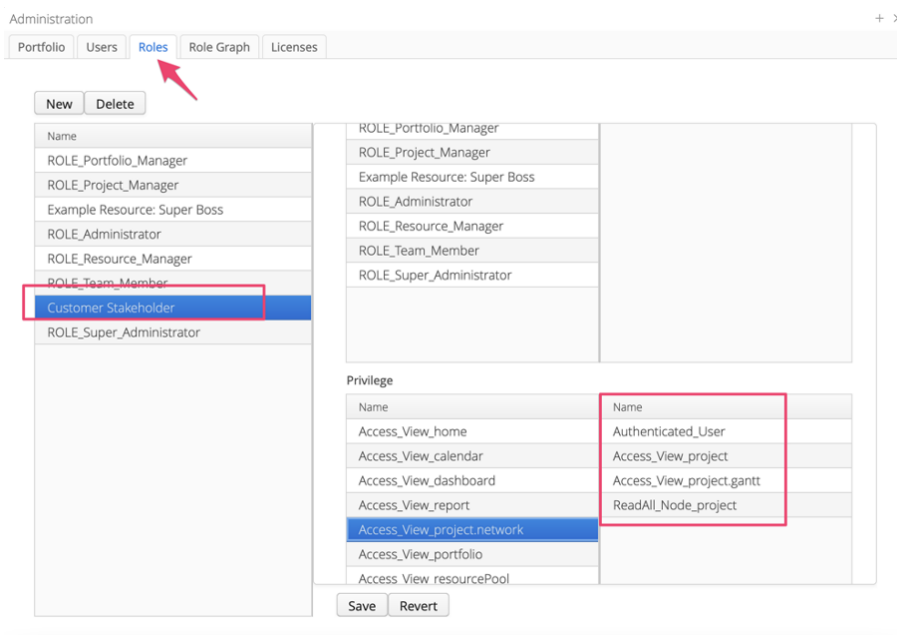
Example descriptions of privileges available to assign to roles:
- Authenticated_User can log into ProjectLibre
- ReadAll_Node_project shows the Project tab, no other views selected so other views will not be populated on the menu
- Access_View_Project displays the Project menu tab
- Access_View Project Access_View can view a project

When assigned the ReadAll_Node_project privilege, the user would see ProjectLibre looking like this (Figure 12):
- Only menu item is the Project
- Only icon in the Project view is the Gantt Chart

**Figure 12**

*ReadAll_Node_project user's view*
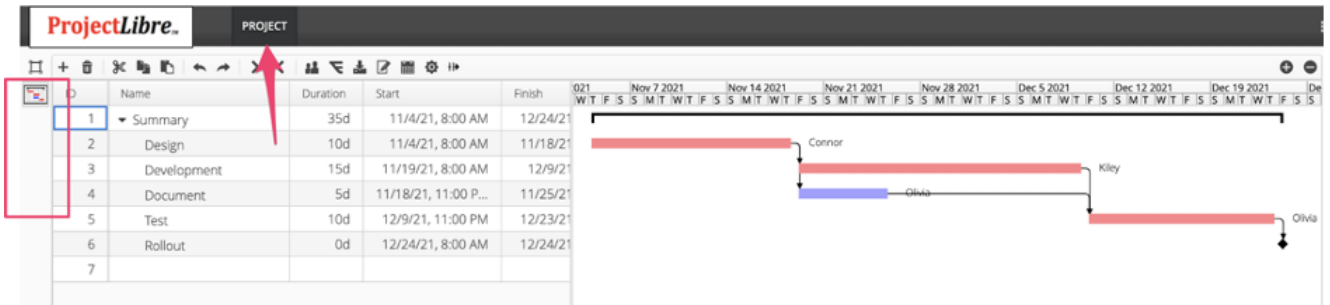


If we log-out and then log-in as an Admin, then we can edit a role by adding privileges. In Figure 13 we selected the privilege Access_View_project_network and dragged it to the right. When we save the role, the user will now see the Project tab and both Gantt Chart and Network Diagram icons as shown in Figure 14.

**Figure 13**

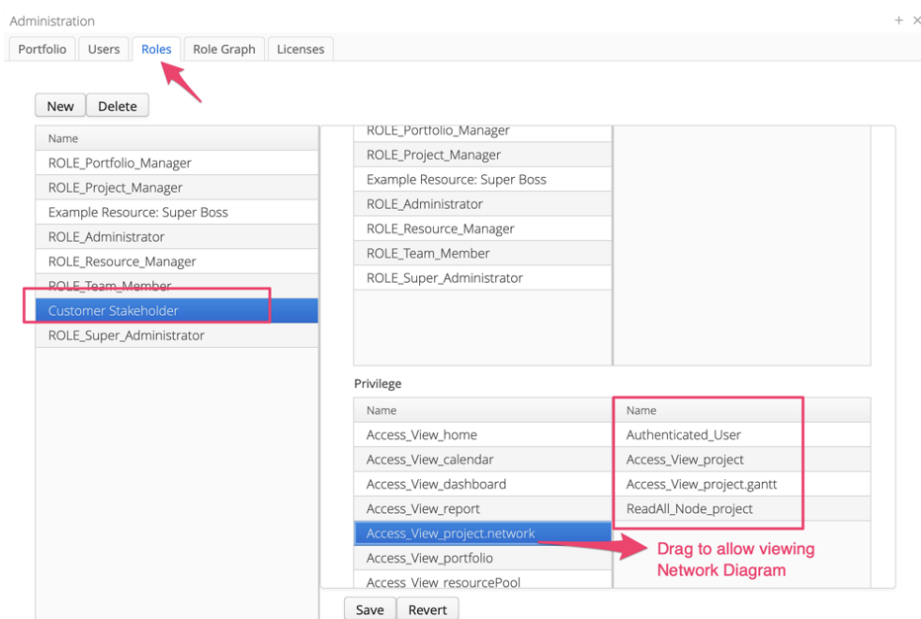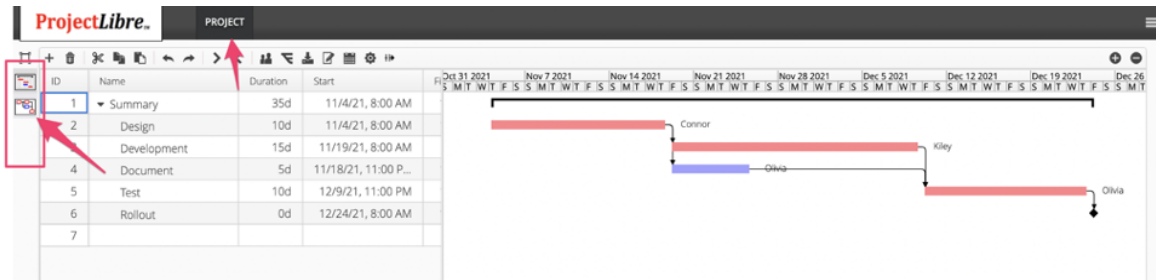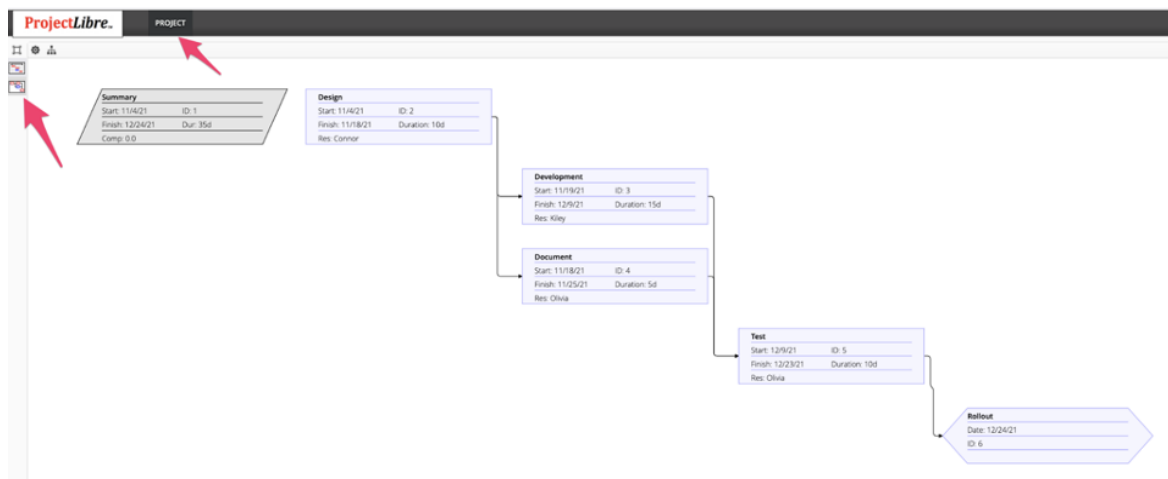*Access_View_project_network privilege selected*

**Figure 14**

*Customer/Stakeholder's view after assigning privilege*



The user would have access to both the Gantt Chart shown above and also the icon to select the Network Diagram shown in Figure 15.

**Figure 15**

*Network diagram view*



# Creating Additional Users

Once roles are created or viewed you can create additional users.  The initial person logging in will be automatically assigned the Admin role.  This is so they can create new users.

Selecting the Admin icon ☰ and the Users tab is only available if you signed in as an Admin role. Selecting New opens a dialog box where entering the new users:

- Name (first and last)
- User Name within ProjectLibre
- Email
- Initial Password
- Resource (drop down list to align a new user with an existing Resource)
- Role (preselected role is a team member with the privileges set for team members. You can select other roles and drag to the right.  A user can have multiple roles.

# Licenses

In the Administrator tab for Licenses it displays the number of subscriber licenses for the two primary roles. These can be modified. The current pricing is the same for all users. The subscriptions are priced monthly and billed in annual increments.  If adding additional users they will be billed in an annual amount.

See Figure 16 for an example for a company called "Company Testing." The example indicates that 5 Project Manager licenses are currently being used out of the maximum of 10 licenses. The Team Member option has currently 2 licenses being used out of 8 total.

**Figure 16**
*Licenses tab*

# Role Graph

The Role Graph is not a standard view but could be added (see Figure 17). It is most useful for large organizations with many roles. The graph is similar to a hierarchical view of the roles within your organization. The default Role Graph with hierarchical privileges is:

- Administrator
- Portfolio & Resource Manager
- Project Manager
- Team Member

**Figure 17**
*Role Graph*
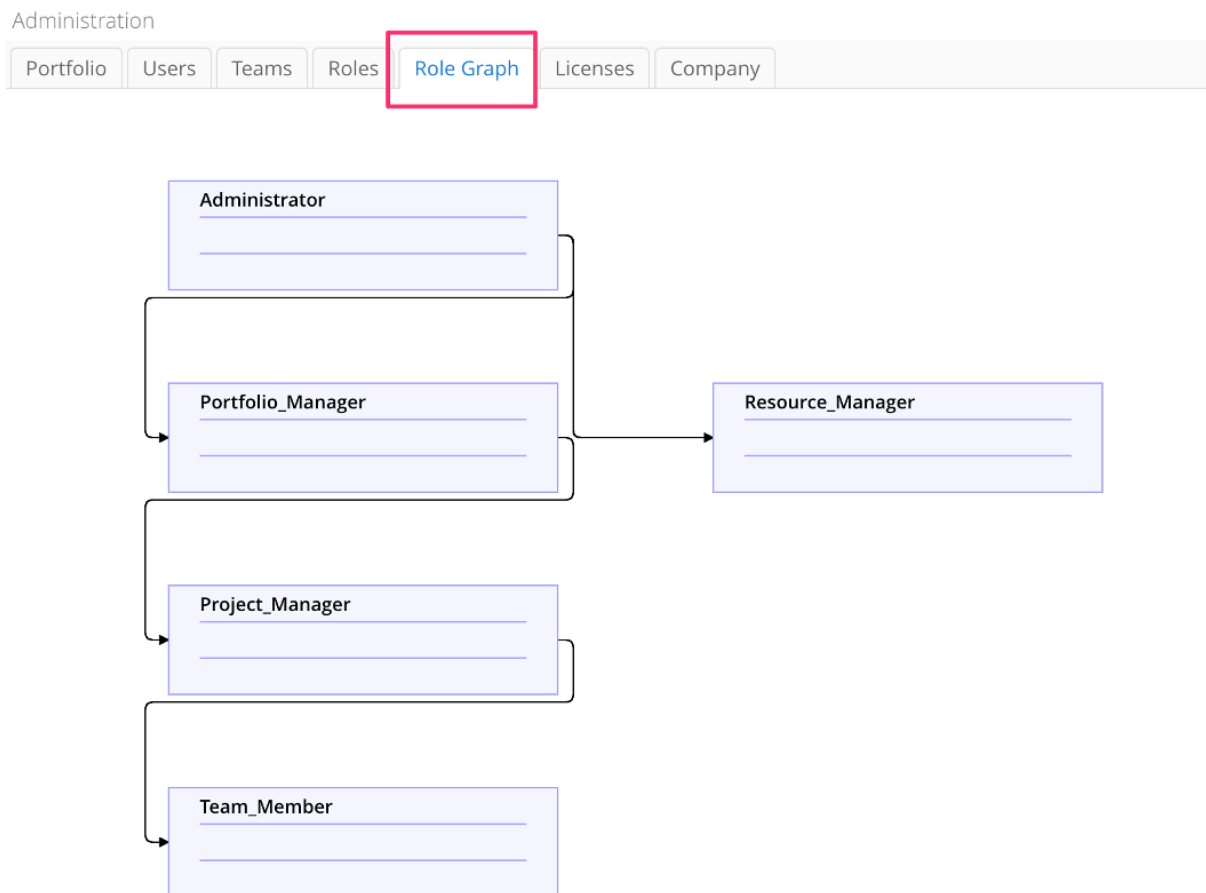
# Assigning Users to Resources

After creating users and resources, the users can be linked to resources in the project schedules. Clicking on the Resources tab displays the list of resources within

ProjectLibre (see Figure 18).  The window popup is the Admin ☰ and User selected.  There is a Resource dropdown list in the user's details where you can select one of the resources to be mapped to the resource. In this instance we have selected Marc but you can see all the available resources are available.
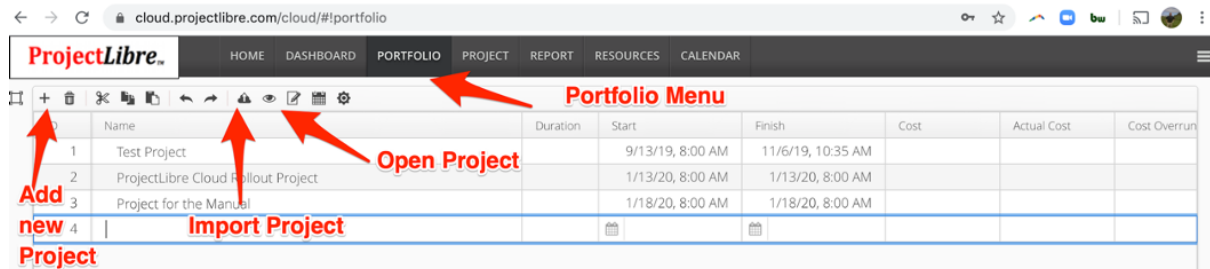
**Figure 18**
*Resources tab*
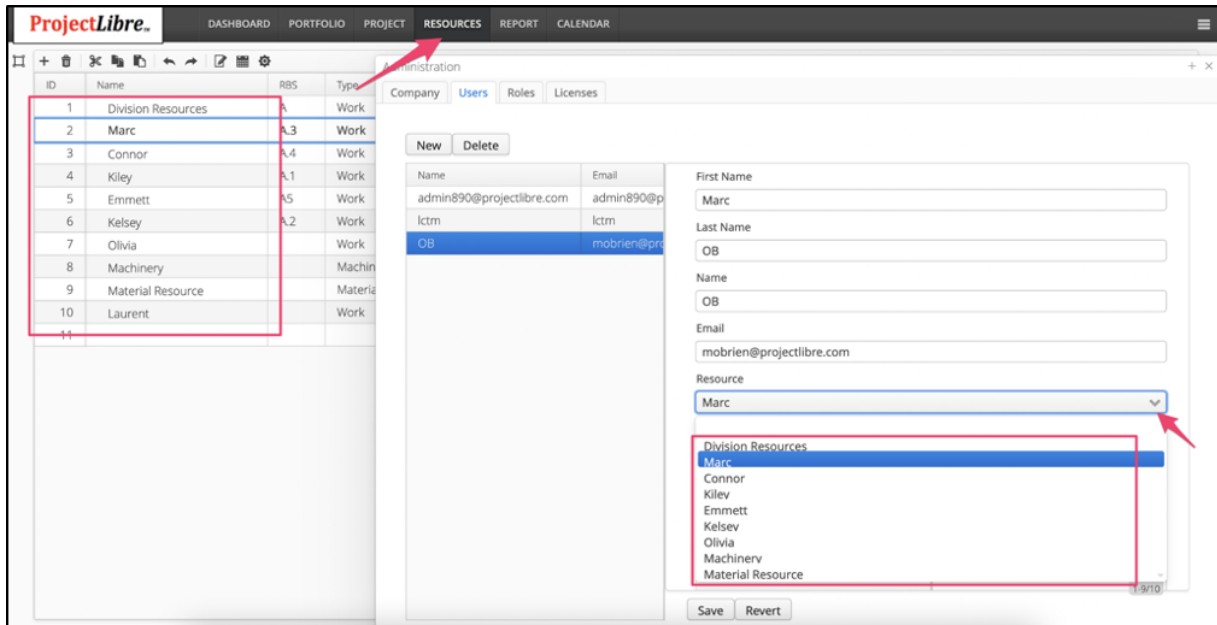
# Portfolio View

After logging into ProjectLibre in your browser, select Portfolio and view a list of all your projects (see Figure 19).

**Figure 19**
*Portfolio view*



You can also select:

$+$ to create a new project

to import a project file such as ProjectLibre .pod, Microsoft project, Primavera, .xml, or any .mpx files generated from other software. You may also create a new one.
*Note: Not all software properly exports in .mpx format correctly so cross check when opened.*

In the Portfolio view, selecting "New" $+$ inserts a project into the portfolio list. In Figure 20, we named it "Project Rollout Project."
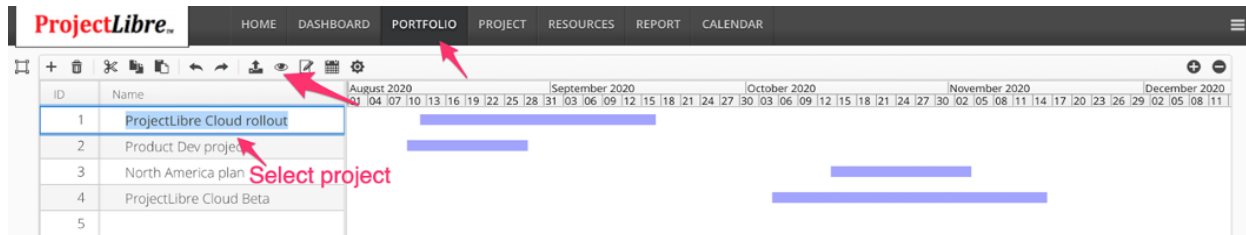
**Figure 20**
*New project*
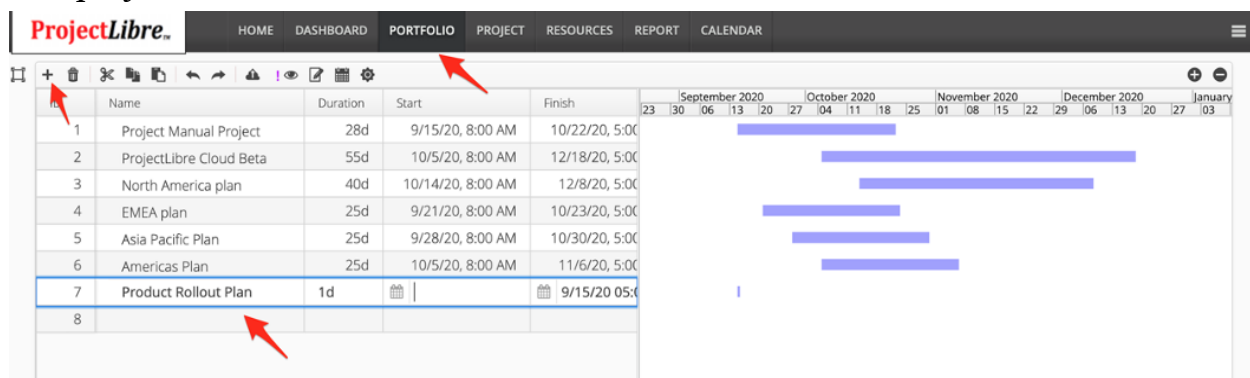
# Open Project

The opening of a project is from the Portfolio view. Select/click on a project row in

the spreadsheet and choose Open Project 👁 . In Figure 21, we are opening the new
project which was just added.

**Figure 21**
*Open project*



The project opens with an empty Gantt Chart. You can enter tasks, durations, and
link the tasks in the spreadsheet.

# Project Detail Dialog Box

The project has been created and tasks, durations, precedence relationships, and
summary structure have been entered. In the Portfolio view, we can now look at the

Project Details dialog box by clicking on the Edit project icon 📝 .

Most of the fields are calculated, but you can also set the Project Status, Priority and
Risk, and fill in the Status Update field for calculations (see Figure 22). Once again,
most of these fields will be automatically calculated, and you can come back to this
screen. Other than the General tab, the dialog box has an Actuals, Calendar, and
other tab as well.

**Figure 22**
*Project Details dialog box*
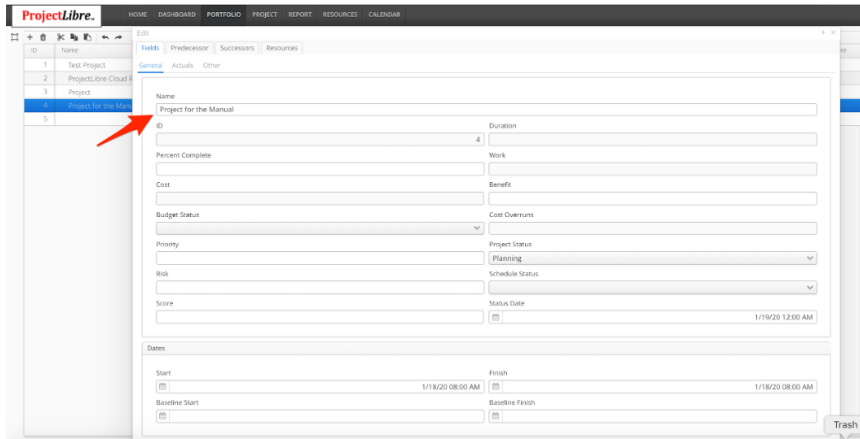
The Actuals tab is used when the project is being executed to enter actual and remaining cost or work (see Figure 23).

**Figure 23**
*Actuals tab*



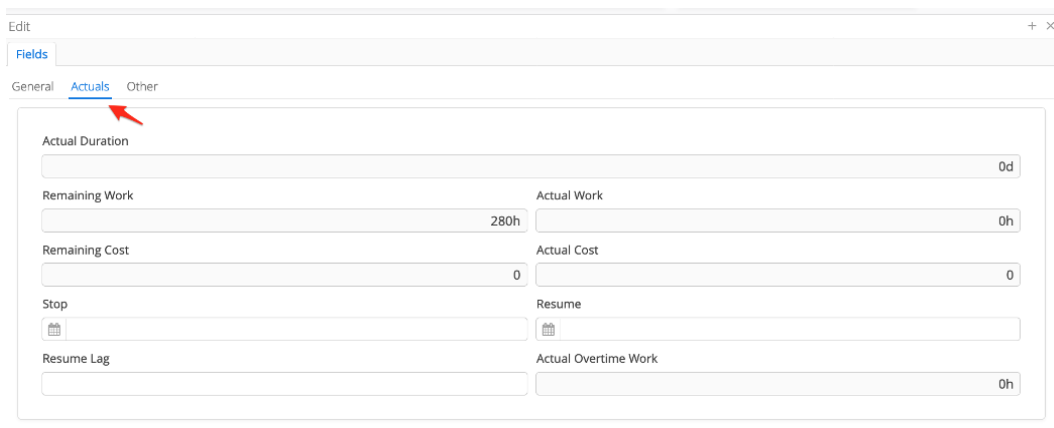The Other tab will also be used later. ProjectLibre enables creation of custom fields for the project.  The Other tab would display those fields for updating but not used here. This information is also displayed in the quick start video.

*Note: For Cloud applications such as Google Docs, there is not a traditional Save option. There is unlimited Undo-Redo as in the Google applications but not the traditional Save feature.*

# Import ProjectLibre Desktop or Microsoft Project

In addition to creating new projects within ProjectLibre, you can import desktop ProjectLibre files (.pod), Microsoft Project files (.mpp or .mpx), Primavera project files (.xer or .xml), and many programs that export in the proper format such as the .mpx file format (Figure 24).

**Figure 24**

*Import project*
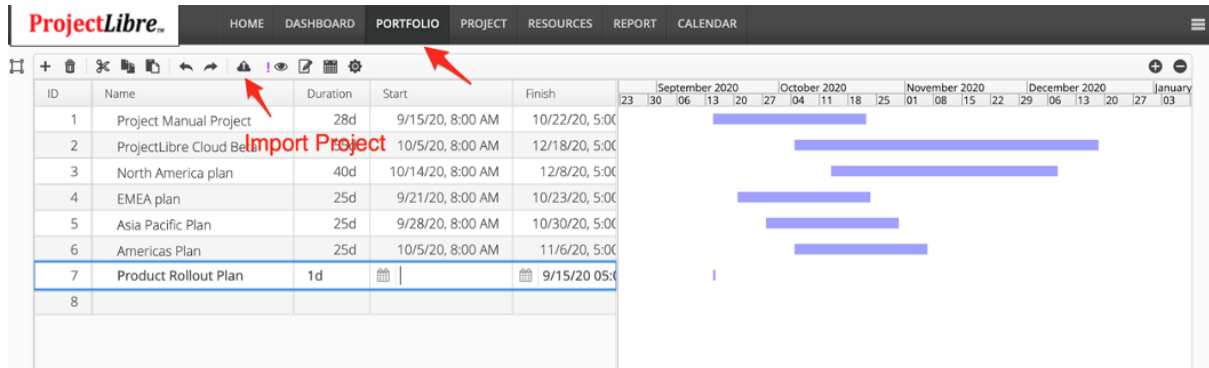


In the Portfolio view, selecting the Import icon  opens the Import screen where you will select Import and display your file directory to select the project file to import. Once again, you can import ProjectLibre files (.pod), Microsoft Project files (.mpp or .mpx), Primavera project files (.xer or .xml), and many others (Figure 25).
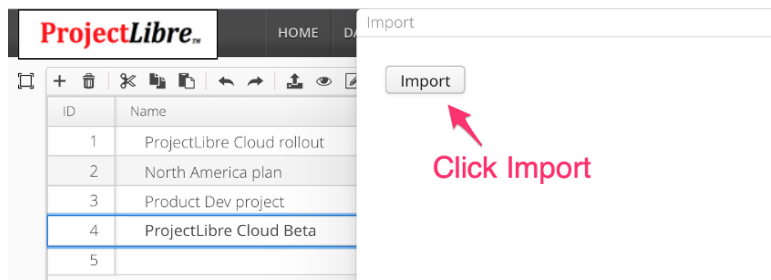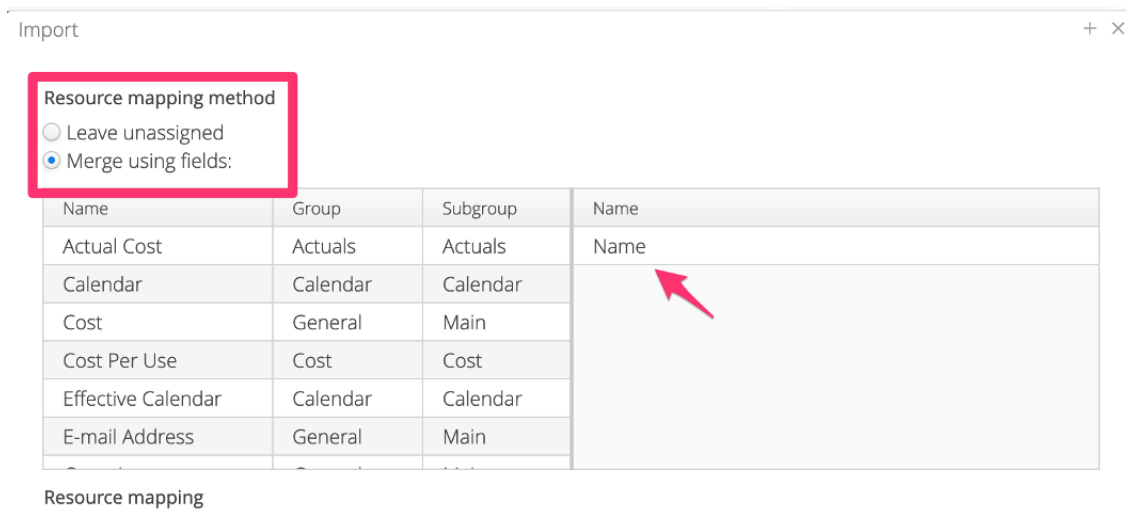
**Figure 25**

*Import screen*



When the project file is selected, you are given the option to either leave resource assignments unassigned or map resources to the Cloud resource pool. If choosing "Merge using fields," you can map the assigned resource to your Cloud resource pool (Figure 26). You can choose which field is most effective to map the resources from the desktop project into your Cloud.  A few common examples are Name or Email. This will match the data in the desktop resource assignment to a resource residing in the Cloud resource pool.

**Figure 26**

*Merge using fields*



Resource mapping method
○ Leave unassigned
◉ Merge using fields:

| Name | Group | Subgroup | Name |
|------|-------|----------|------|
| Actual Cost | Actuals | Actuals | Name |
| Calendar | Calendar | Calendar | |
| Cost | General | Main | |
| Cost Per Use | Cost | Cost | |
| Effective Calendar | Calendar | Calendar | |
| E-mail Address | General | Main | |

Resource mapping

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If you choose "Leave Unassigned," the project will import with placeholder assignments called "Unassigned" and you will switch them out with current resources or enter new resources (Figure 27).

*Note: The hours assigned to a task from an unassigned resource import. However, as we don't know the resource particulars like cost, that is not imported and you will need to update.*

**Figure 27**
*Resource mapping method*
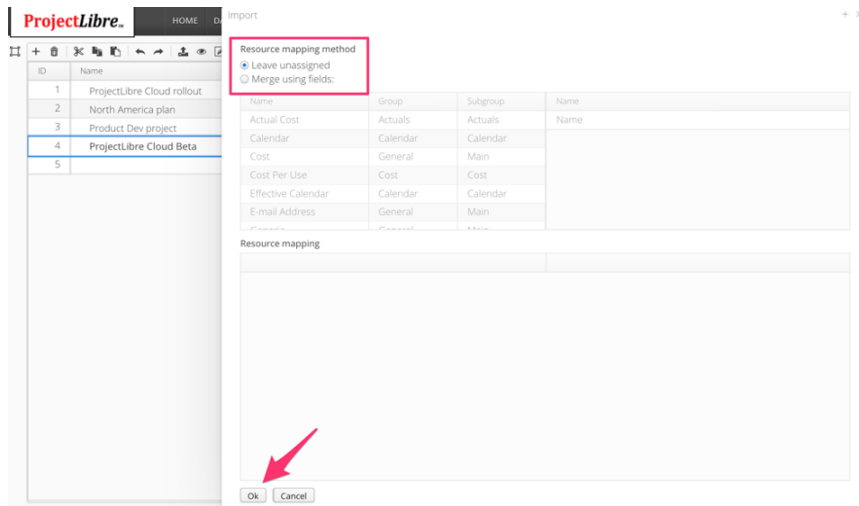


Once again, leaving assignments unassigned causes the work hours assigned to "Unassigned" until you edit the project. We recommend you ensure the resources are created in the Cloud prior to importing the project so you can map them automatically (Figure 28).

**Figure 28**
*View of Cloud resource pool*



| ID | Name | R... | Type | E-mail Address | Gro... | Standard Rate | Cost Per Use | Overtime Rate |
|----|------|------|------|----------------|--------|---------------|--------------|---------------|
| 1 | Division Resources | A | Work | | | 0 | 0 | 0 |
| 2 | Connor | A.4 | Work | Connor@projectlibre.com | Marc | 110 | 0 | 0 |
| 3 | Marc | A.3 | Work | Marc@projectlibre.com | Marc | 130 | 0 | 0 |
| 4 | Kiley | A.1 | Work | Kiley@projectlibre.com | Marc | 100 | 0 | 150 |
| 5 | Olivia | | Work | Olivia@projectlibre.com | Marc | 145 | 0 | 0 |
| 6 | Mindy | A.2 | Work | Mindy@projectlibre.com | Marc | 120 | 0 | 0 |

The other option is to Merge the resource pool from your desktop .POD file into your existing resource pool (Figure 29).

**Figure 29**

*View of desktop resource pool with assignments being imported.*



Clicking on "Unassigned" next to the resource will reveal a dropdown list that displays the available resources to map (Figure 30).

**Figure 30**

*Available resources to map*



In this case we are selecting Marc and saving. The project will now import using those resource costs and availability based on the Cloud settings. In this example, there is still an unassigned resource (Kelsey) from the desktop (Figure 31).

**Figure 31**

*Unassigned resource example*
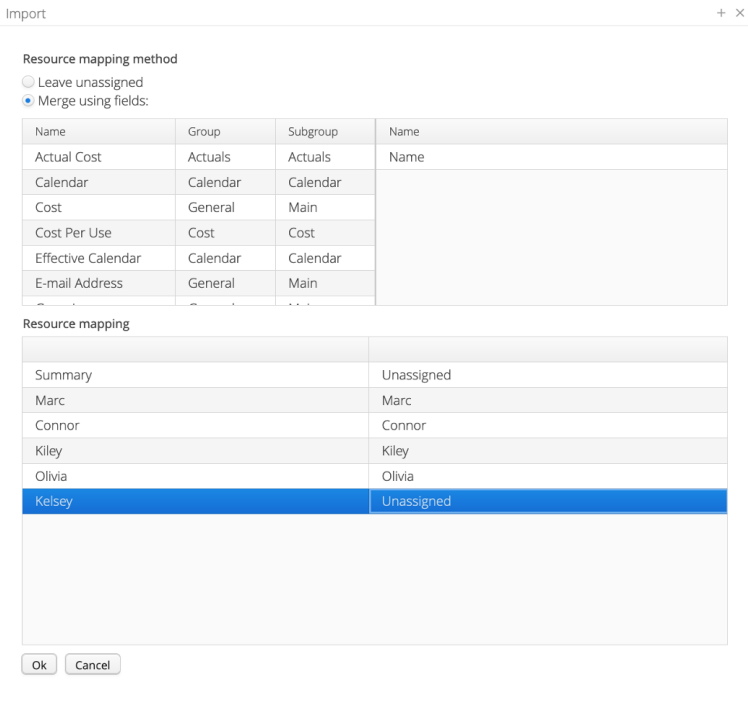


Click OK and the project will be imported into ProjectLibre Cloud and display in your Portfolio of projects (Figure 32).

**Figure 32**

*Example portfolio view*
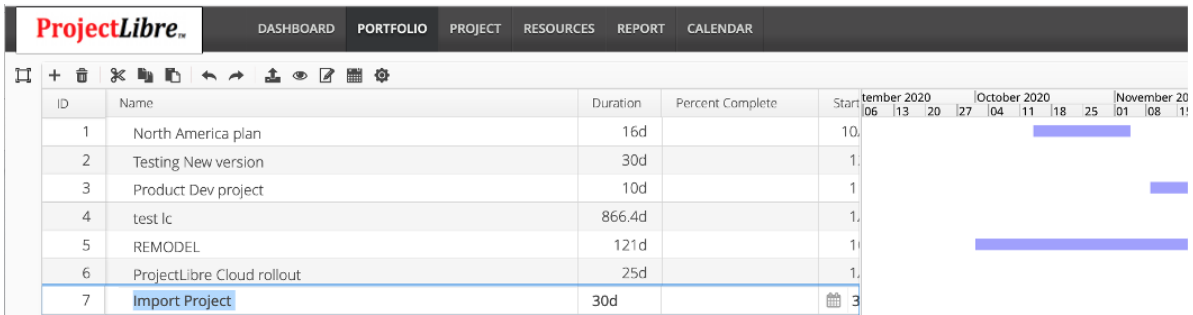


Simply open 👁 the project and you are now managing your project in the browser.

**Figure 33**

*Project example*

# Entering Task Data

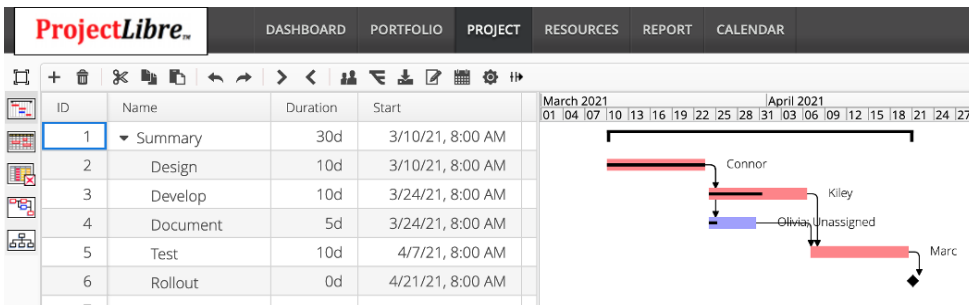The ProjectLibre Gantt chart is split into two panes. On the left is the spreadsheet for entering tasks, durations, predecessors and other project/task information.  In the image below we have entered six tasks including what will become a summary task. We will cover summary tasks later, but they take their duration from the sub-tasks when sub-tasks are indented.

- Critical tasks are red
- Non-Critical tasks are blue
- Milestones (0 duration tasks) are diamonds

ProjectLibre uses Critical Path Methodology. If you link the tasks and create predecessor to successor relationships, then ProjectLibre creates and calculates the schedule. You do this either in the spreadsheet or on the graphical Gantt chart links.

In the spreadsheet, clicking the calendar icon and entering the successor or predecessor task number can create the relationship (see Figure 34).

**Figure 34**
*Opened calendar icon to create predecessor to successor relationship*
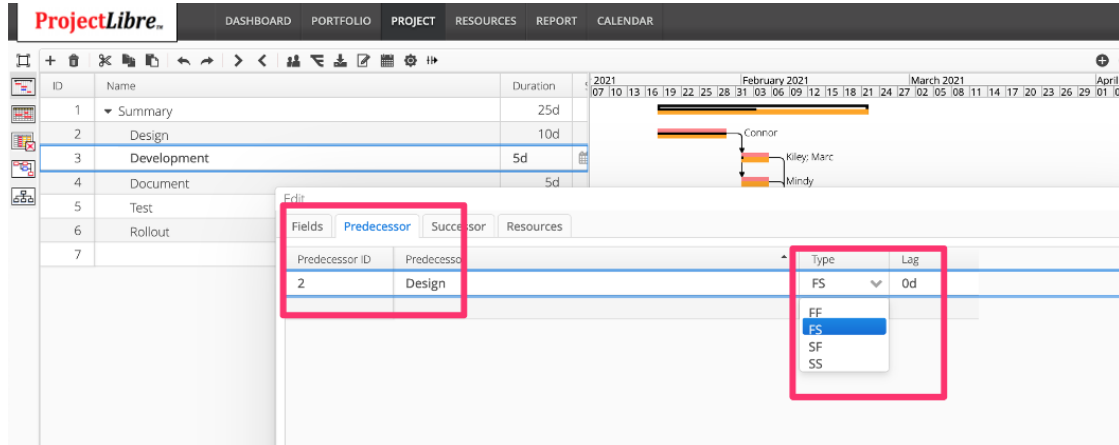


To link tasks on the Gantt Chart, hover the cursor over a task to make the cursor turn into a cross-arrow symbol, right click on the predecessor task, and a red arrow will appear as you drag the link icon to the successor task (see Figure 35). If the wrong tasks were connected, simply click the generated black arrow and hit Remove.

**Figure 35**

*Creating predecessor to successor relationships on the Gantt chart*



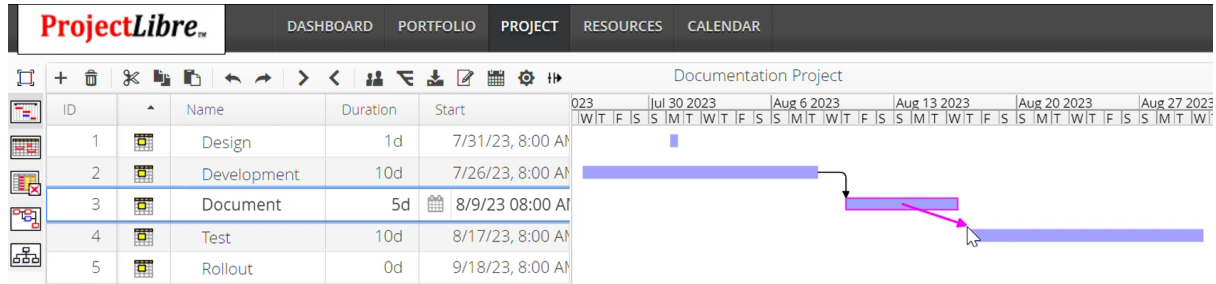*Note: ProjectLibre creates a Finish to Start (FS) relationship by default. This means the predecessor task needs to finish before the successor task starts. Leads and lags (delays) applied to the precedence relationships will be covered later.*

ProjectLibre supports the following precedence relationships:

- Finish to Start (FS)
- Finish to Finish (FF)
- Start to Start (SS)
- Start to Finish (SF)

Task information such as task name, duration, predecessor/successor, and resource assignment can be entered in the spreadsheet. There is also a task detail dialog box. When a task is selected, you can choose the edit icon (see Figure 36).

**Figure 36**

*Edit task*
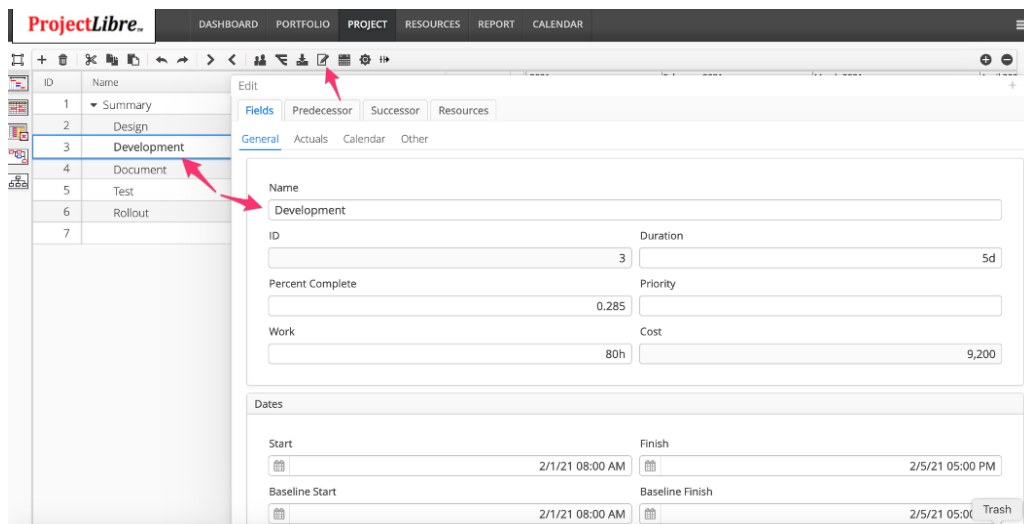
# Configuring the Gantt Chart Spreadsheet and View

The columns presented in the spreadsheet are from Field Lists. The Gantt chart spreadsheet is a Field List that is created and edited using the configure icon which will be covered more in the configuration section.

The exposed spreadsheet columns can be resized by using the cursor and dragging a column separator to the left or right. The columns can be re-ordered by clicking in the title of the column and dragging to the left or right, supplanting the existing column. The Gantt pane is separated from the spreadsheet with a vertical separator. When selected, the separator can be moved left or right to expand the view of the Gantt Chart or expand the view of the spreadsheet.

You can also change the time scale with the Zoom In, Zoom out. This changes the displayed time scale (see Figure 37).

**Figure 37**
*Configuring the Gantt Chart Spreadsheet and Gantt View*
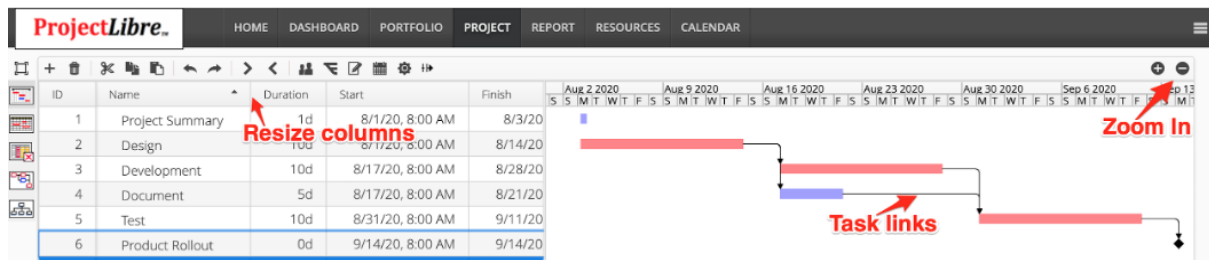
# Summary Tasks

In Figure 38, we had entered 6 tasks with the first one named Project Summary. It will become a Summary or "rollup" task. This is created when you indent tasks below the Summary task. We highlighted the subtasks numbers 2 - 6 and indented them. This creates a hierarchical relationship that will roll up the durations and costs to the next level Summary task. You can have an unlimited hierarchy of Summary tasks which also correlates and creates a Work Breakdown Structure (WBS) that we'll cover more later

**Figure 38**
*Rolled up summary tasks*
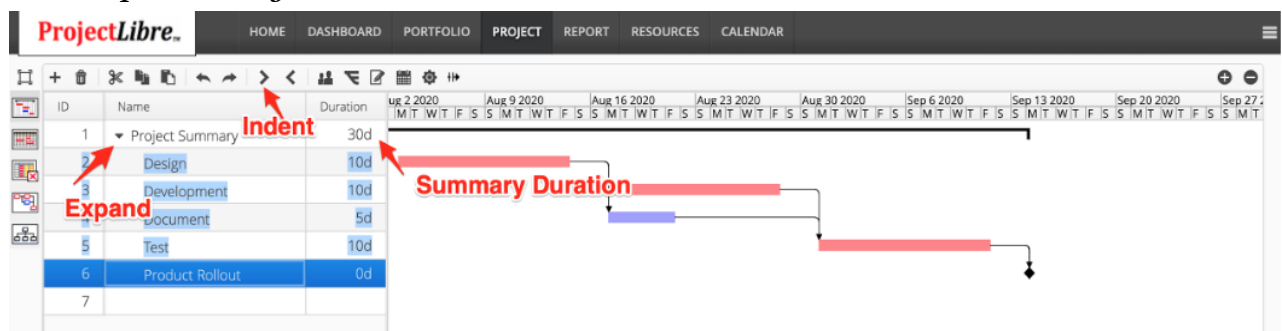


When the tasks are indented, the Project Summary task rolls up the durations. There is an arrow next to the Summary task and clicking on the arrow will collapse the subtasks and just display the Summary task with the data rolled up. This allows a convenient way to manage the project.

You may have compressed phases, displaying detailed tasks on project sections you are currently working on. Figure 39 shows the project compressed by clicking on the Project Summary task arrow.

**Figure 39**
*Compressed list*
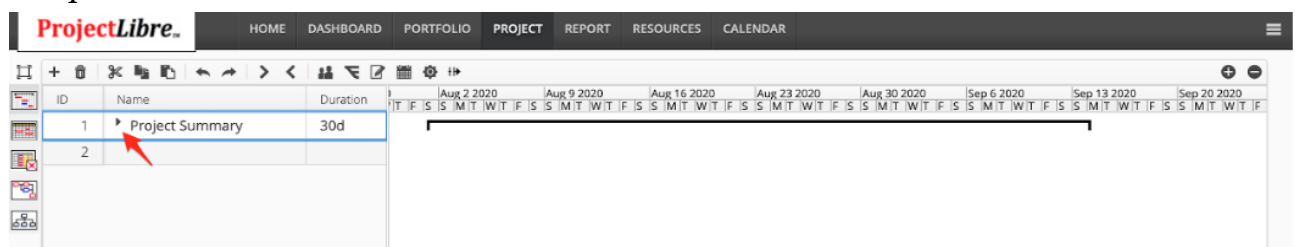
# Export ProjectLibre Project

ProjectLibre exports a project into an .xml file which can be integrated with other solutions.  When you open a project, you will see the export icon. Selecting the export icon initiates the download of your project in .xml format (Figure 40).

**Figure 40**
*Export project*
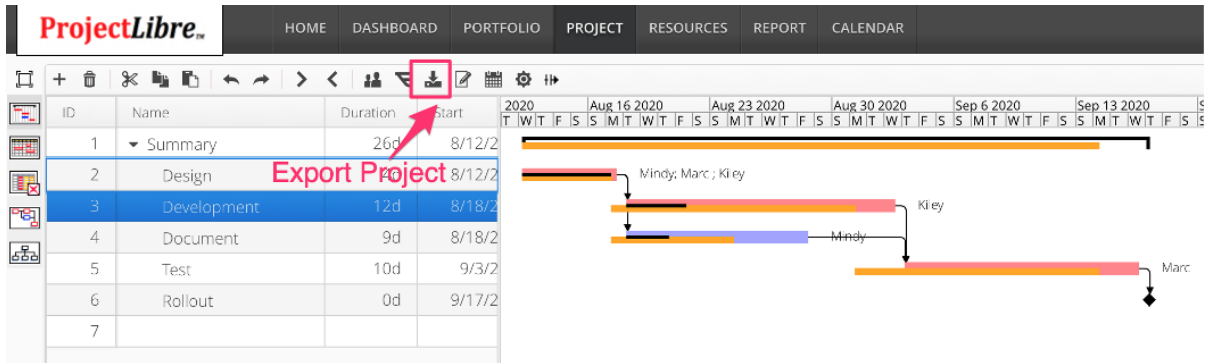


The export of your ProjectLibre project downloads can be integrated with ERP, Cost Accounting or other solutions (Figure 41).

**Figure 41**
*.xml download*

# Navigation with the Primary Menu

The primary navigation through ProjectLibre and use of program capabilities starts on the main menu. Primary selections for navigation are on the menu bar and include Dashboard, Portfolio, Project, Report, Resources and Calendar (Figure ###). We will examine each Menu section.
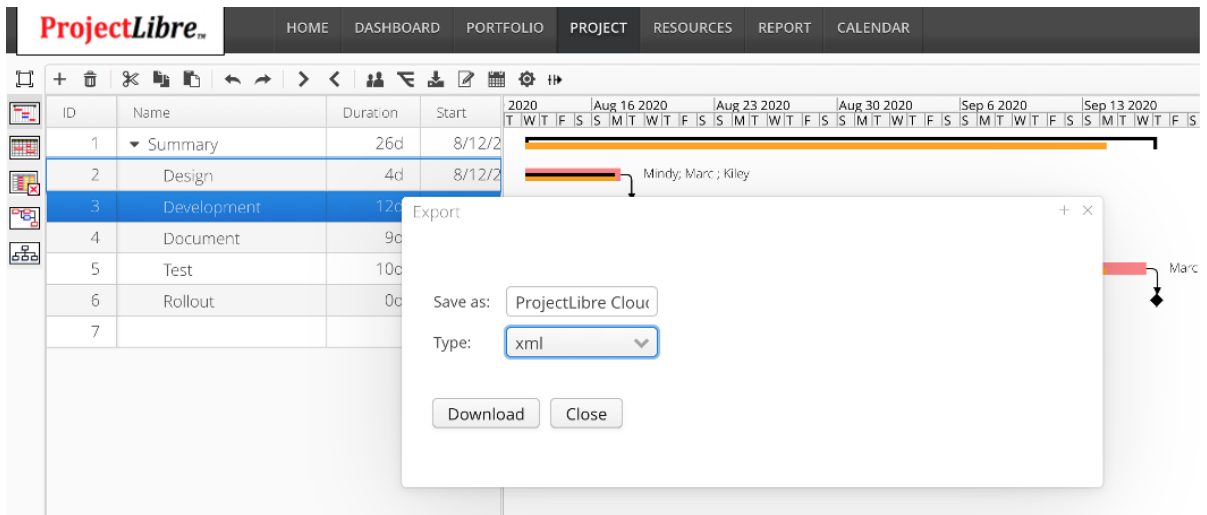
**Figure ###**
*Menu bar*
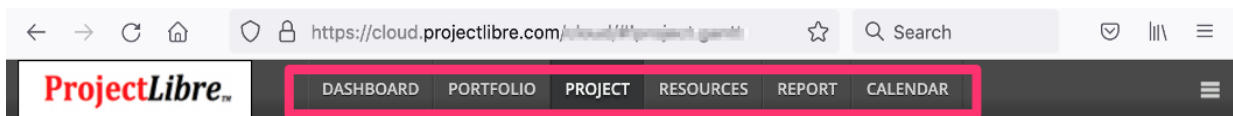


## Dashboard Menu

Selecting Dashboard displays the dashboard view. This is configured with dashboard components. The Dashboard configuration  and Panel data configuration is discussed in more detail in the section Dashboard Layout. The Grid pattern and component views to be displayed in each grid can be customized (Figure ###).

**Figure ###**
*Customizable grid*

# Portfolio Menu

The Portfolio view is a Multi-Project Summary Gantt chart. The menu list displays projects (Figure ###)

**Figure ###**
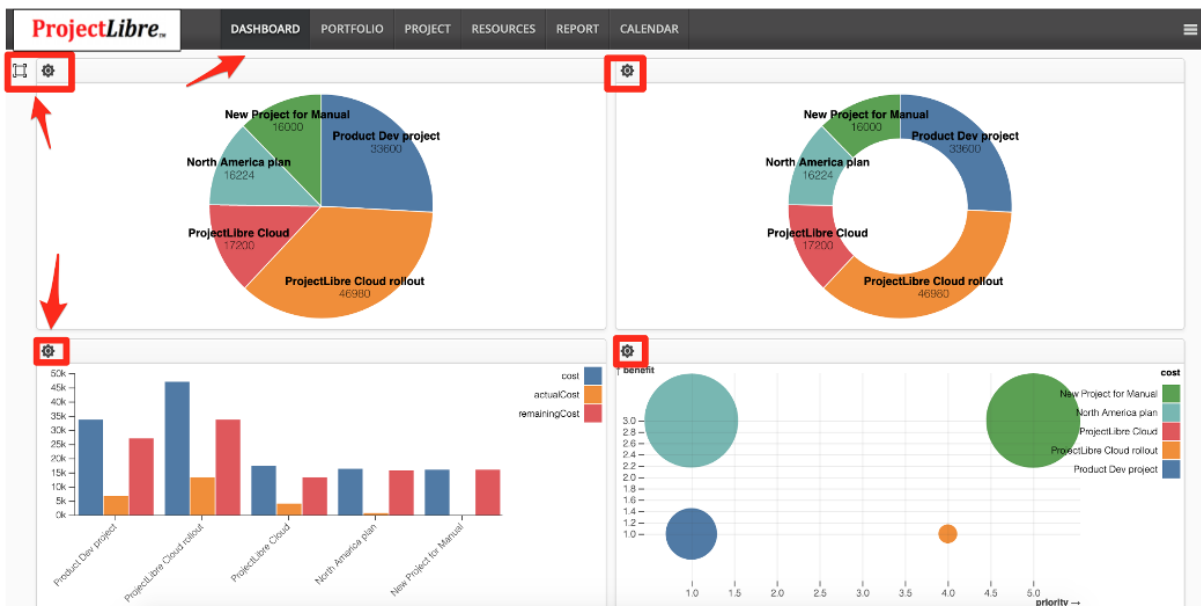*Portfolio View*



Key for icons in Portfolio view:



   Add a Project

   Delete a Project

   Cut , Copy, Paste

   Undo , Redo

   Import project (Microsoft Project or other .mpx  format)

   Open Project

   Edit Project

   Calendar

   Configuration (Preferences, Field Lists, Field which is covered in more detail in configuration)

   Zoom In,  Zoom Out (Portfolio Gantt Chart)

# Project Menu

The Project menu opens the detailed project view. It defaults to the project's Gantt chart but you can also select Project Spreadsheet, Project Usage view, Network Diagram and WBS. We will not repeat all icon representations, only the icons which are specific to the Project Menu. They are highlighted with the red arrows in the image (Figure ###). When selecting the Project view it will open the currently selected project.
*Note: If a different project is desired for managing, simply return to the portfolio menu, select and open.*

**Figure ###**
*Additional icons in Project menu*
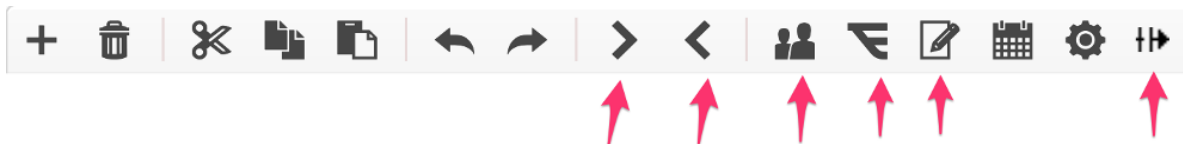


> < Task Indent/Outdent (creates hierarchy, summary tasks and WBS structure)

Edit Task

Baseline Project

Split Task

# Resource Menu

Icons seen in the Portfolio and Project menus are repeated in the Resource menu.

# Calendar Menu

The selection opens up the calendar view of all tasks (Figure ###).

**Figure ###**
*Calendar menu*

# Log Out of ProjectLibre

ProjectLibre will automatically sign users out for inactivity.  However, if a user wants to log out can also click on the corner icon.



30

# ProjectLibre Views



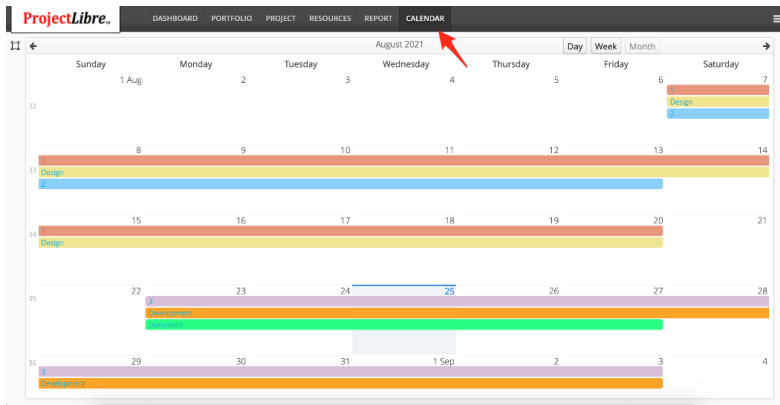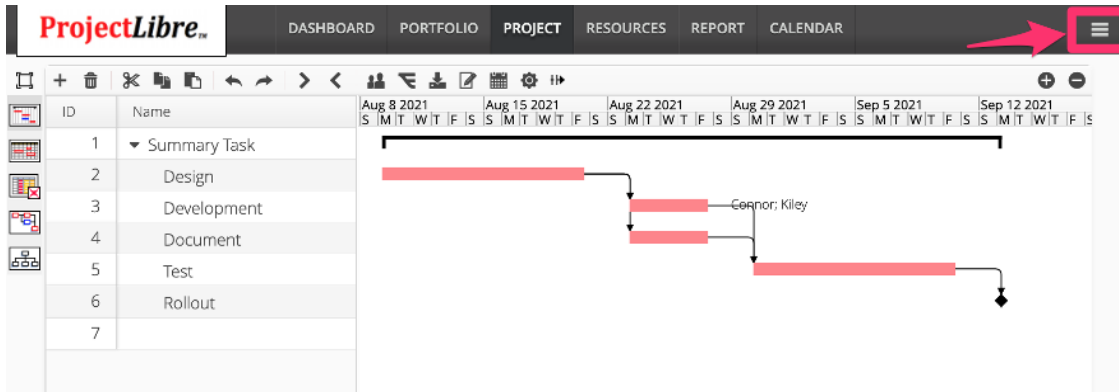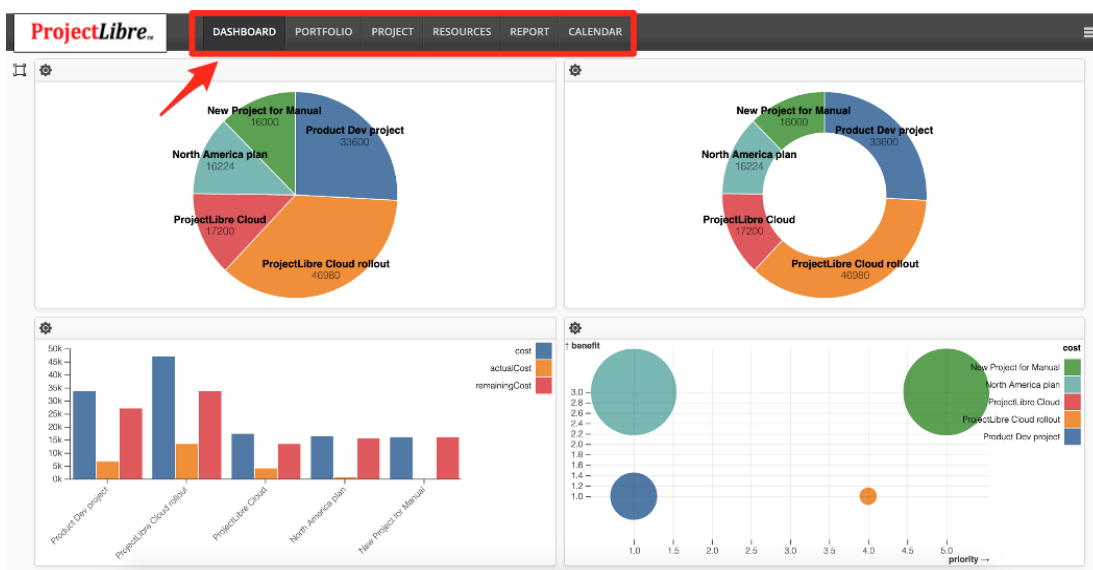The Dashboard view is used as a management central nervous system.  The ProjectLibre Dashboard is highly customizable.  In the image below we have configured the layout to be a 2 x 2 grid so there are four graphs being displayed.   The grid is populated by dragging  components into each quadrant creating the Dashboard.  Then within each component Graph the data displayed is selected in the component configuration.

## Dashboard Layout

The Dashboard panel Layout is a customizable set of options to configure the layout of the dashboard.  This includes the grid pattern, shown with a 2 x 2 grid of Columns and Rows.  The second configuration is the Panels to display in the grid.  The selection of which graph is simply dragging a selected graph into the panel.  Each graph can also be configured with which information is displayed in the graph.  A good example is a pie chart and selecting cost to be displayed for each project (called a Field List and covered later).

When the Dashboard view is selected, the existing dashboard configuration and views will be displayed.  If it is desired to change either the layout format or views displayed can be done with the Edit icon,  which is "View Configuration".
When the  is selected it opens a side dialog box for configuring the dashboard.  Note: to close the dialog box you re-click on .
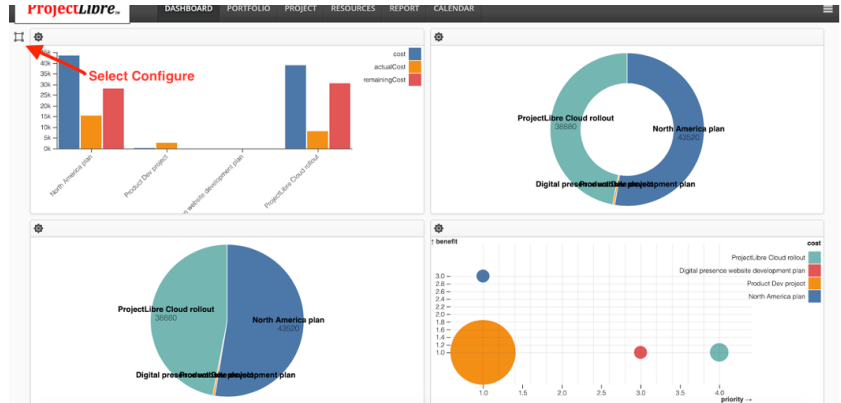
**Layout:** This is established by setting the number of columns and rows in the dashboard.  The various graphs can also be selected to "Fit to Page" both vertically and horizontally.  This ensures they are all viewed on one screen without scrolling.
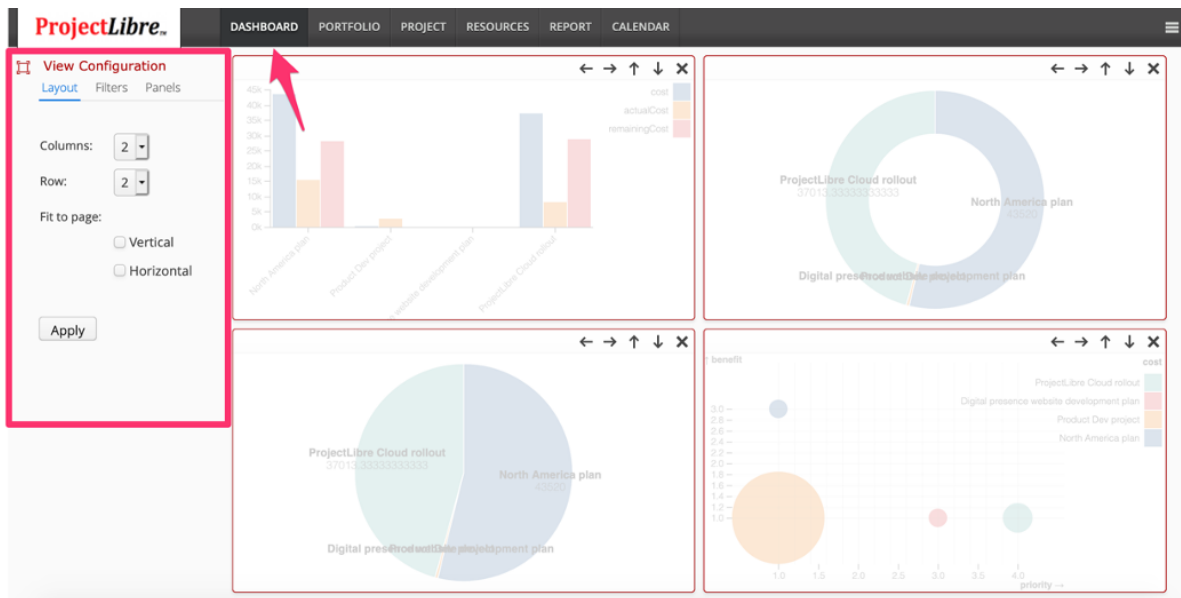
### Dashboard Project Filters

 The filters option if "Select Projects" is checked will allow you to select which project's data is displayed in the Dashboard graphs.  You can click and control click to select different projects. This is useful when you have many projects but want to focus on active projects.  If the "Select Projects" radio button is selected then you can select specific projects to be displayed in the Dashboard Panels.
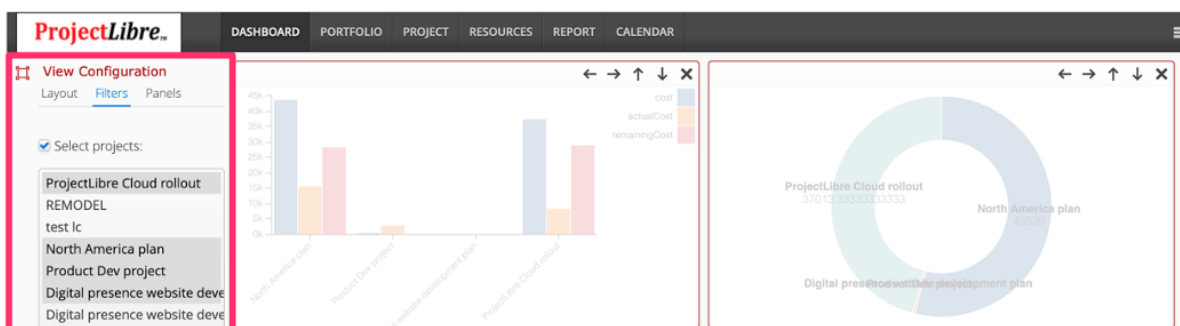
In addition to selecting specific projects you can filter the projects displayed based on fields. Here is a Dashboard showing all projects with Cost over $1,000. This is done by identifying the field in this case $cost and >$1000 then Apply. As you can see these projects display.
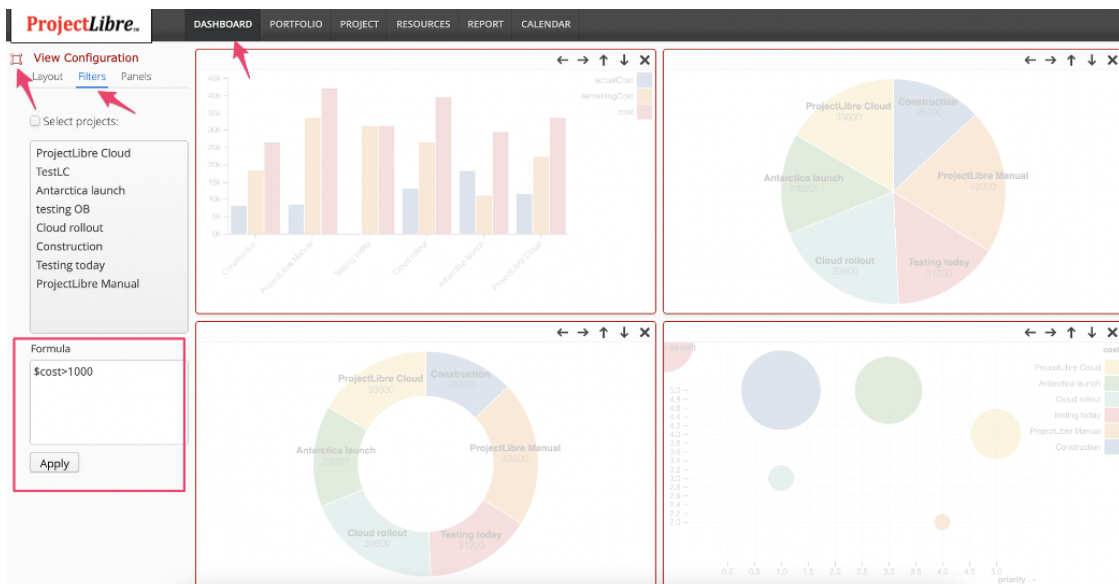


Changing the filter to all projects whose cost is Less then $1,900 is done by putting the Filter in $cost<1900 and these projects will be displayed. You will notice the projects displayed in the Panels are only 2 projects that are under that Cost filter.
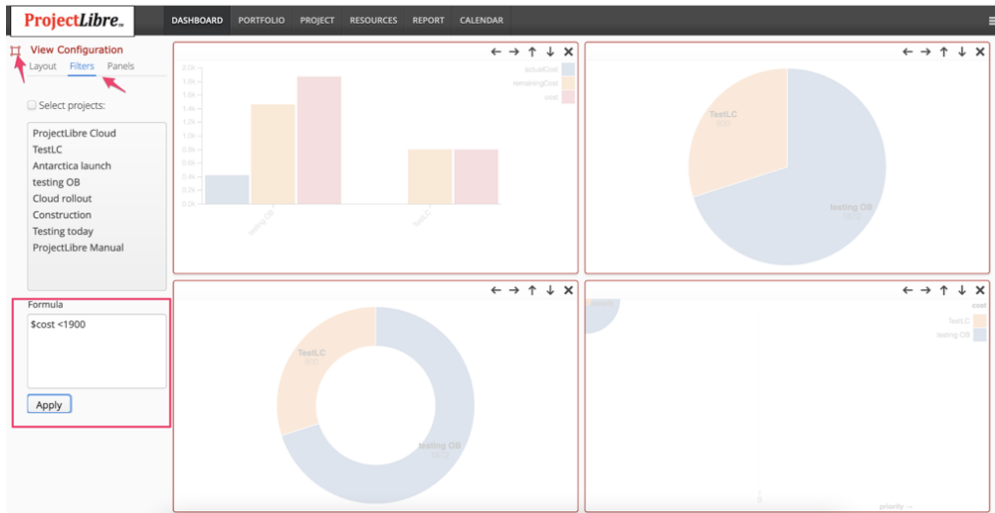
## Dashboard Graphs (Panels)

Once the layout grid and projects are selected, we can now populate the frames with graphs.  The following graphs are available to populate the dashboard.

- Bar Chart (Grouped)
- Bar Chart (Stacked)
- Horizontal Bar Chart (Grouped)
- Horizontal Bar Chart ( Stacked)
- Pie Chart
- Doughnut Chart
- Bubble Chart
- Discreet Chart

The population of the Dashboard is accomplished by selecting a chart and dragging to a section on the Dashboard.  When complete click on the View Configuration again and the Charts will be displayed.
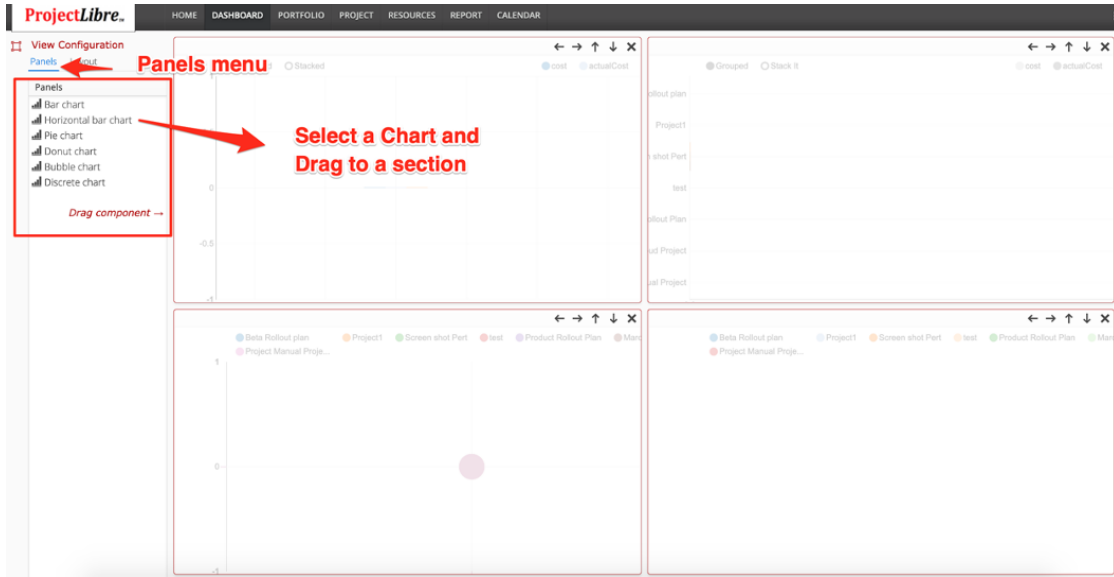
Once "View Configuration" is clicked again and you see the Graphs.

**Dashboard with a 2 x 2 grid: Vertical Bar Chart, Pie Chart, Bubble Chart, Donut Chart**



## Graph/Panel Configuration

The ProjectLibre Dashboard layout and chart selection is performed with the  icon. Once your layout grid and charts are selected you will see them in the Dashboard. Each dashboard chart can individually be configured using the gear icon in the top left of each Dashboard element. Each Graph has a configuration icon to customize the data the graph will display in the Panel.
Note: ProjectLibre uses data "Lists" throughout the program.  In some views, it determines the spreadsheet columns displayed.  In the graphs it defines the data which will be displayed.

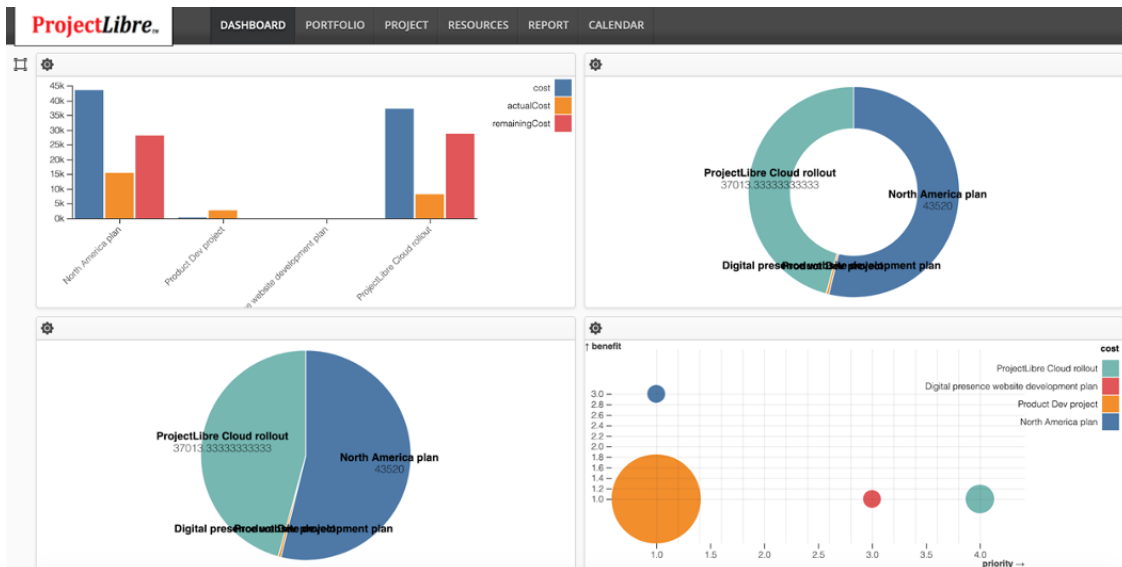The Preferences tab displayed the graph component and current Field list of data that will be displayed in the graph.  There are defaults but to show different data. Simply select the "Field Lists" tab.

When the Field List is selected you can create a New field list. You name the list and below is a list of all ProjectLibre data fields.  Selecting a field and dragging it to the right will place that data on the graph in the order on the right.  In the example below: we are configuring a Bar Chart and will display "Cost", "Actual Cost" and "Cost Overruns" as the vertical bars for each project.
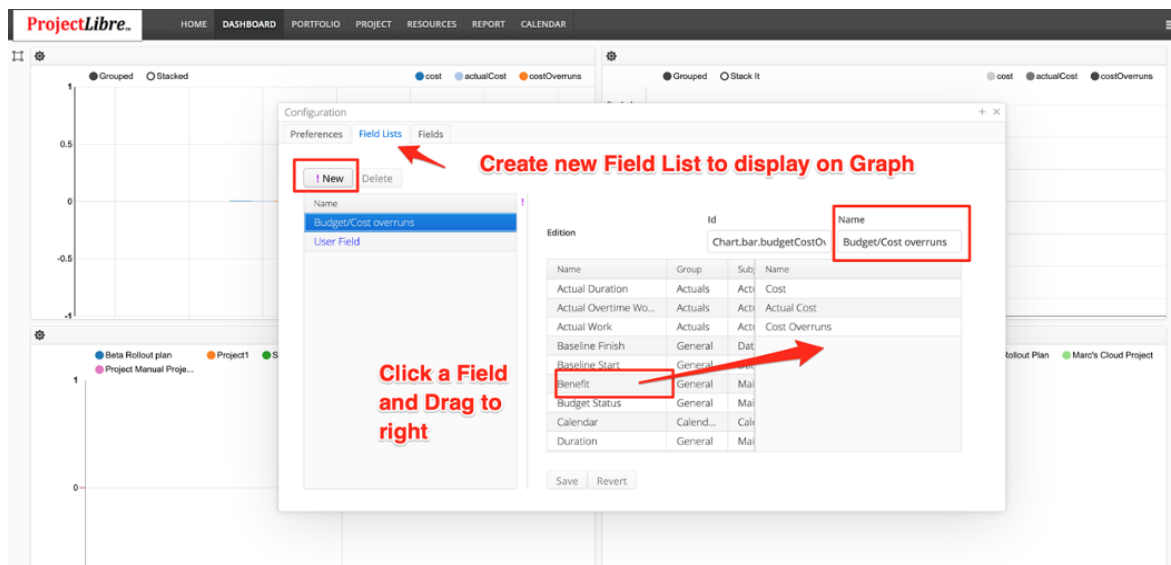


***Note*: in addition to all ProjectLibre fields.  Custom fields can be created. This is covered in the spreadsheet sections but is available here.  The fields will be available in spreadsheets for data entry but also displayed on graphs if desired.  We will discuss more in the other view sections as here it would display.**
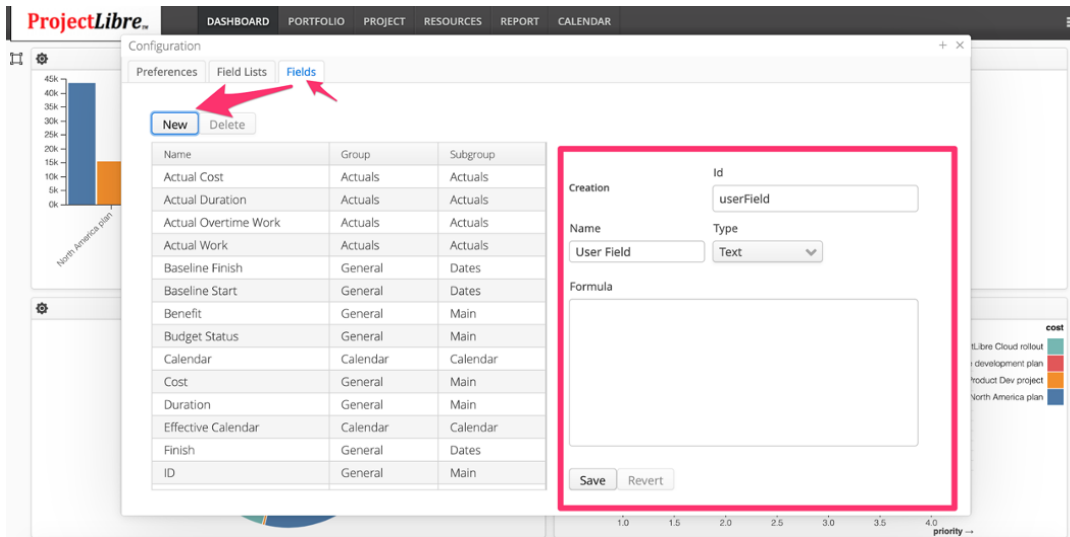
When the new Field List is created.  The Preferences tab is where you can select that Field List and the selected data will display on the Graph.
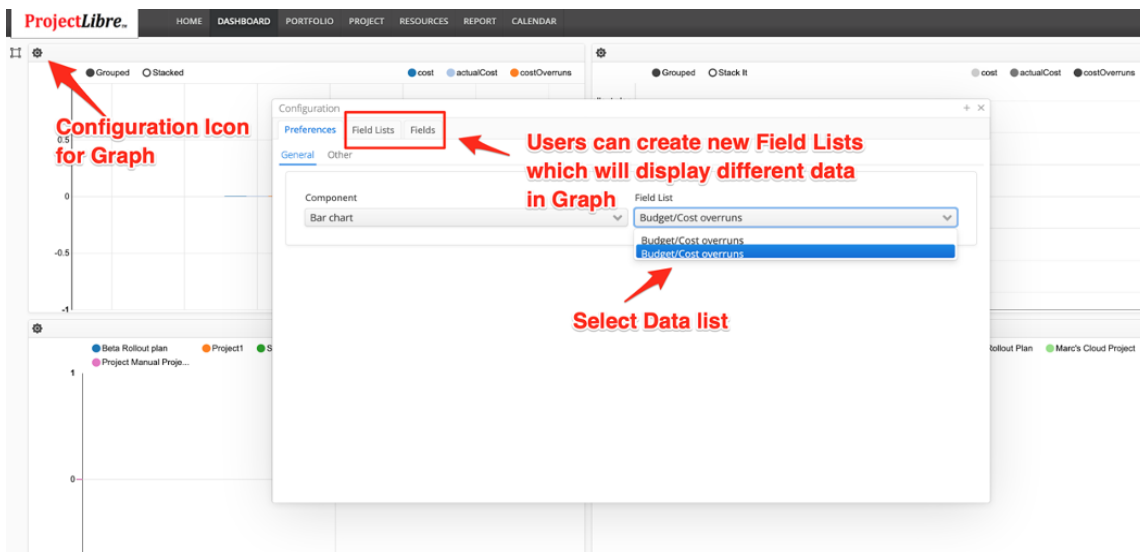


**Configure Bar Chart**

The Bar Chart Panel Chart displays the data selected in the Field List in a vertical Bar Chart.  It displays the data for all selected portfolio projects. Once again the data displayed is established with the Field List and applied to the Bar Chart.  There are two Bar Charts one is Grouped by project and the other is Stacked.  When Grouped the data from the Field List is shown for each project adjacent to each other on the

graph.  The Stacked Bar chart has a singular bar for each project with the data from the Field List displayed stacked instead of adjacent to each other.

Example: In the view below,  a New Field List was created and named.  We have dragged the Cost, Actual Cost and Cost Overruns fields to the right to define the data in the field list.  We then configure the bar chart to display this Field List showing Cost, Actual Cost and Cost overruns.  It will be available to choose with the graph.

We now have a new Field List displaying Cost, Actual Cost and Cost Overruns. Selecting the Preferences tab we can now click on the Field Lists and see a drop down list including our newly created Field List. Selecting the new field list will display this data in the chosen chart.

After applying the field list to the Bar Chart it displays the chart with the data selected. As noted in this image it is a Grouped Bar Chart. You can also select a Stacked Bar Chart.
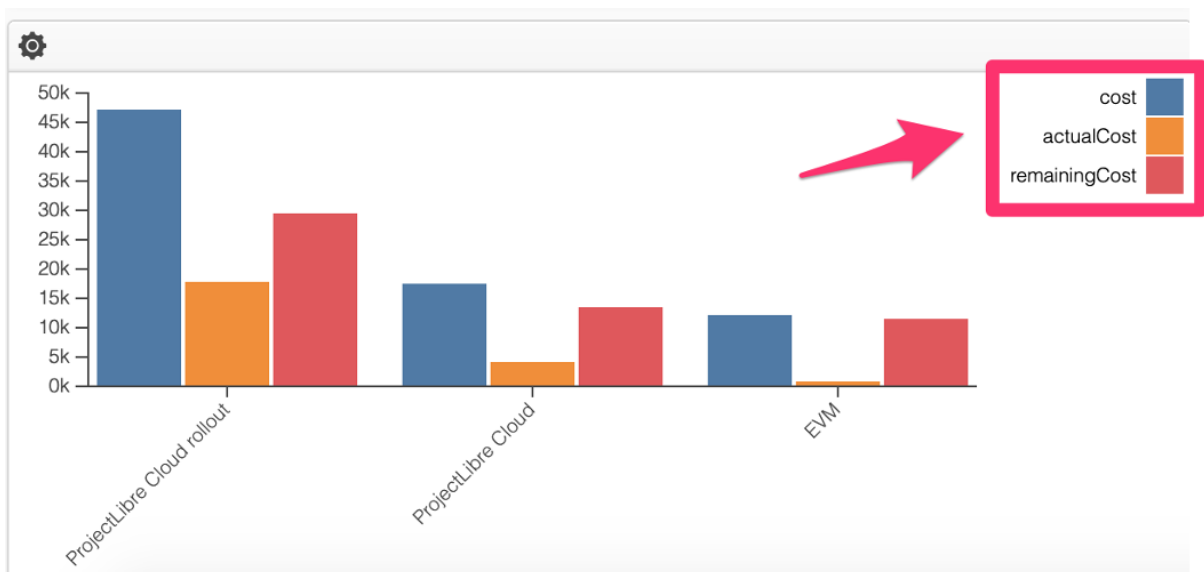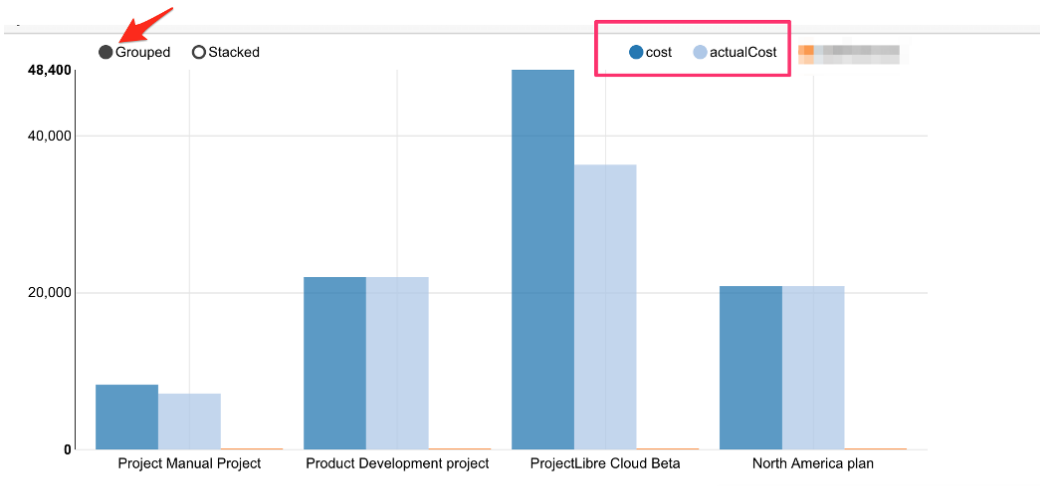
Bar Chart

**Stacked Bar Chart:** The same Bar Chart with Data Stacked instead of Grouped:
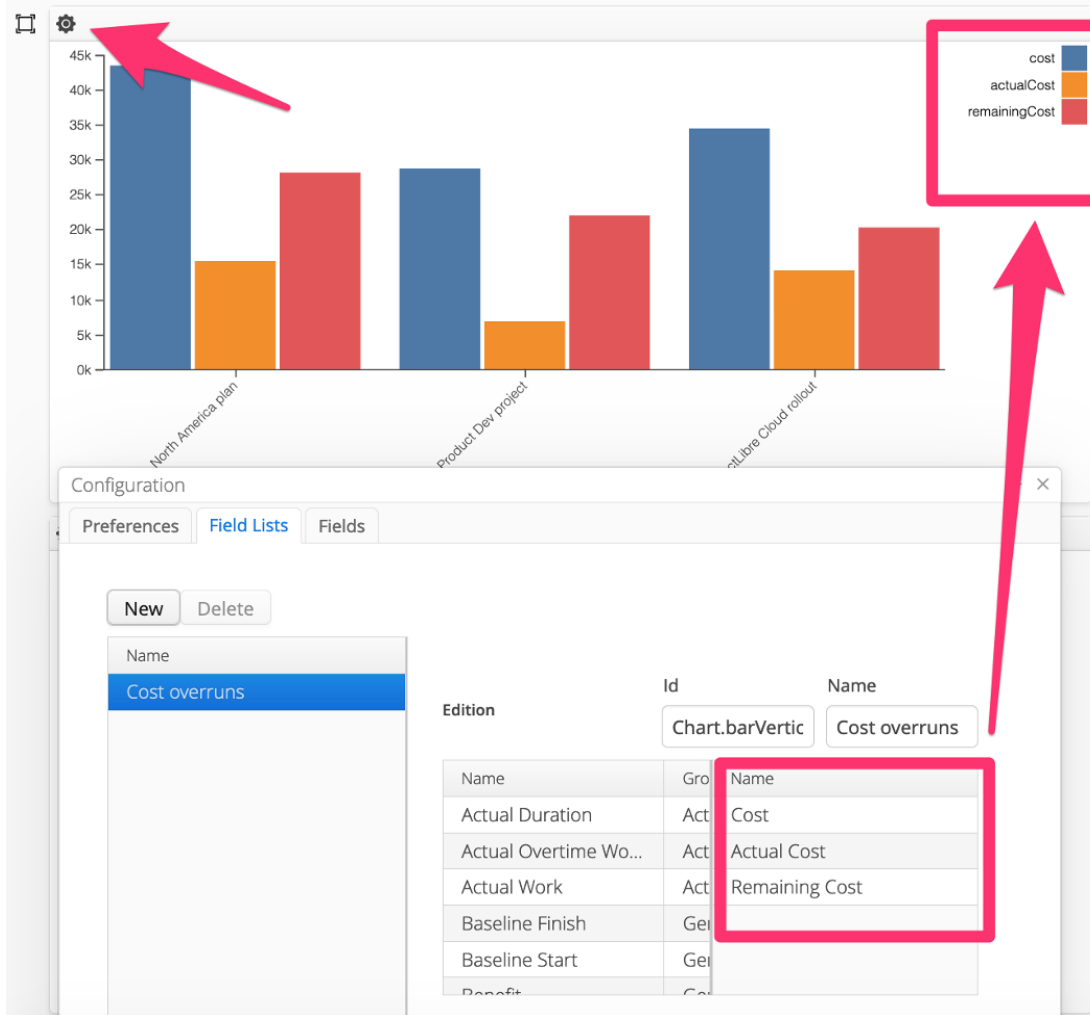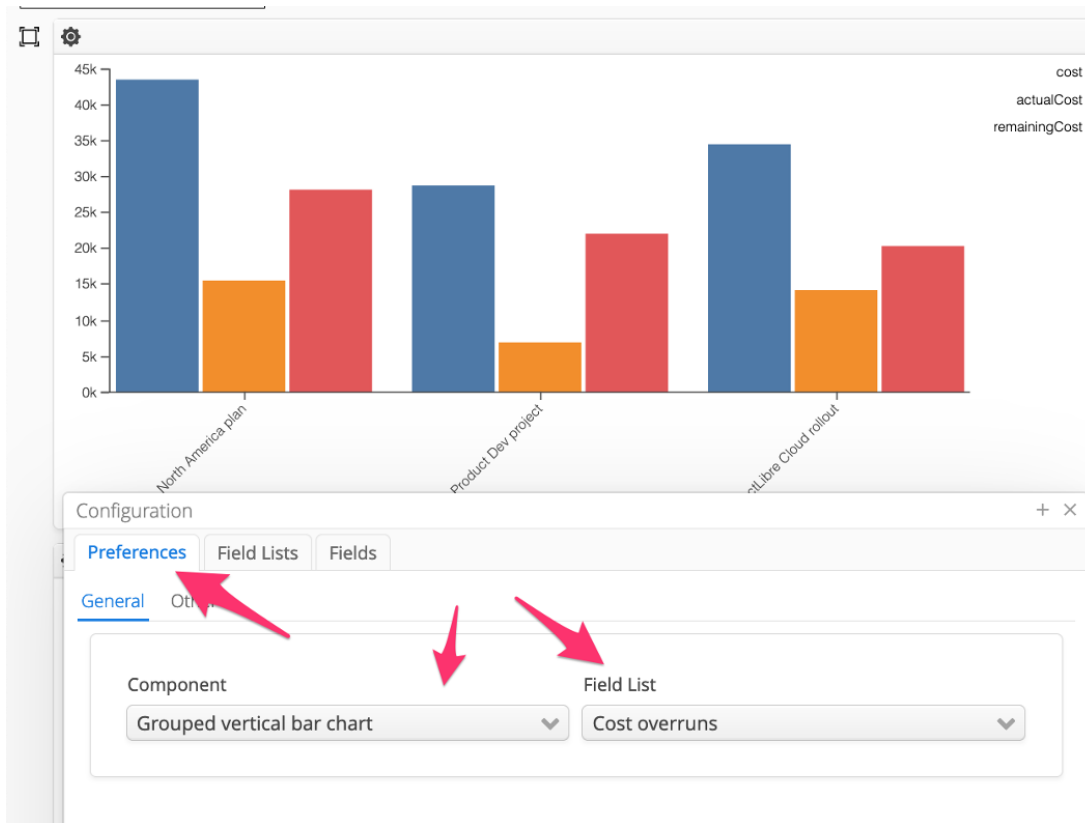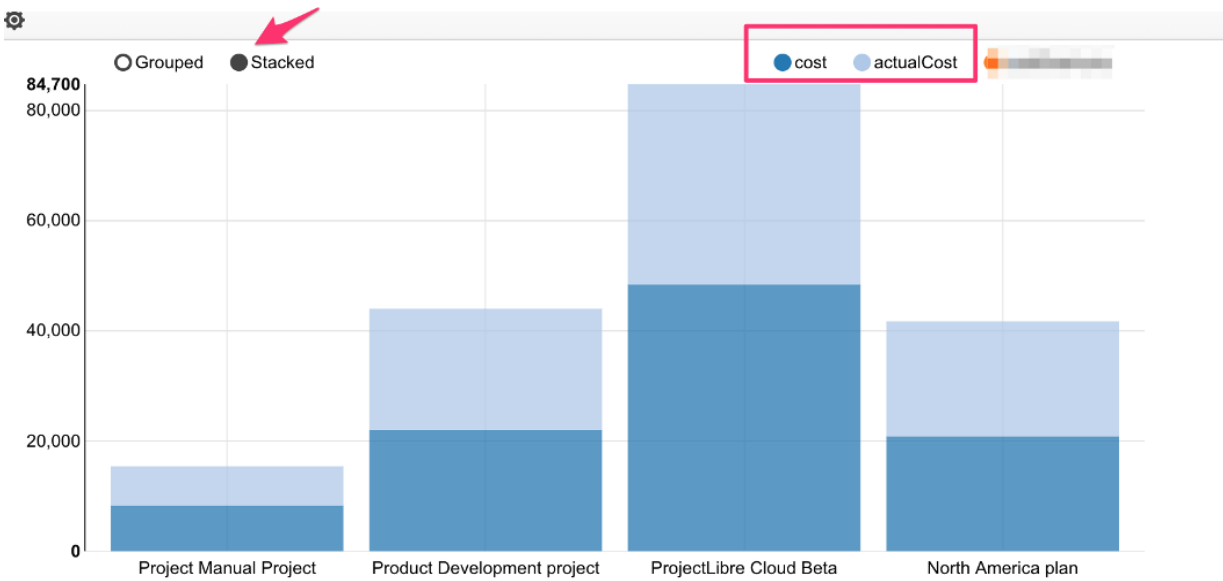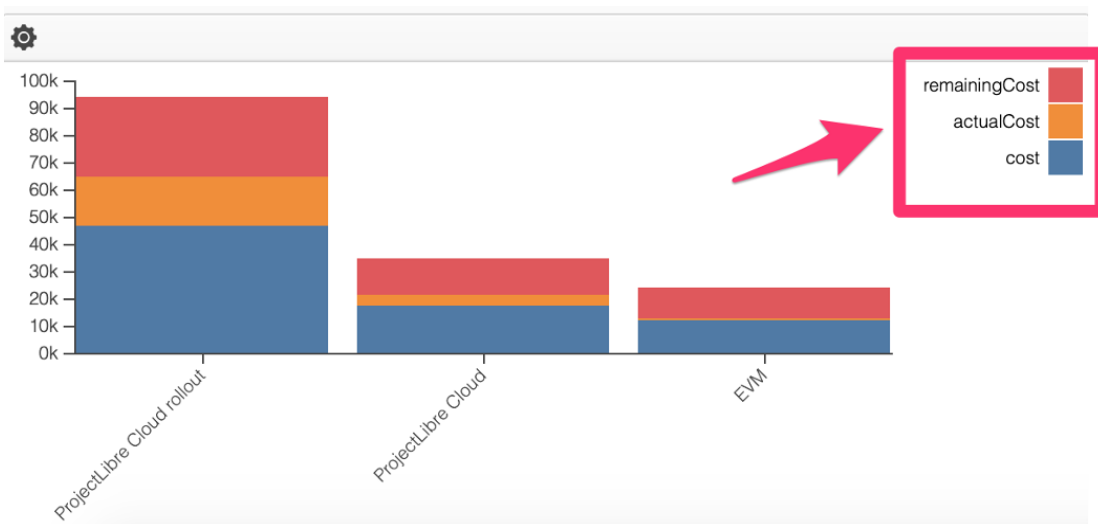
**Configure Horizontal Bar Chart**

The Horizontal Bar Chart Panel Chart displays the data selected in the Field List in a Horizontal Bar Chart. It displays the data for all portfolio projects. Once again the data displayed is established with the Field List and applied to the Bar Chart. There are two Bar Charts one is Grouped by project and the other is Stacked. When Grouped the data from the Field List is shown for each project next to each other on the graph. The Stacked Bar chart has a singular bar for each project with the data from the Field List stacked instead of adjacent to each other.

This chart displays (by default) the same data as the Bar Chart. You can select a different Field List which will then display the data horizontally. It has the same Grouped or Stacked data options. If you place the cursor over any bar it will display the data.

The configuration and Field List is the same as noted above in the Bar Chart.
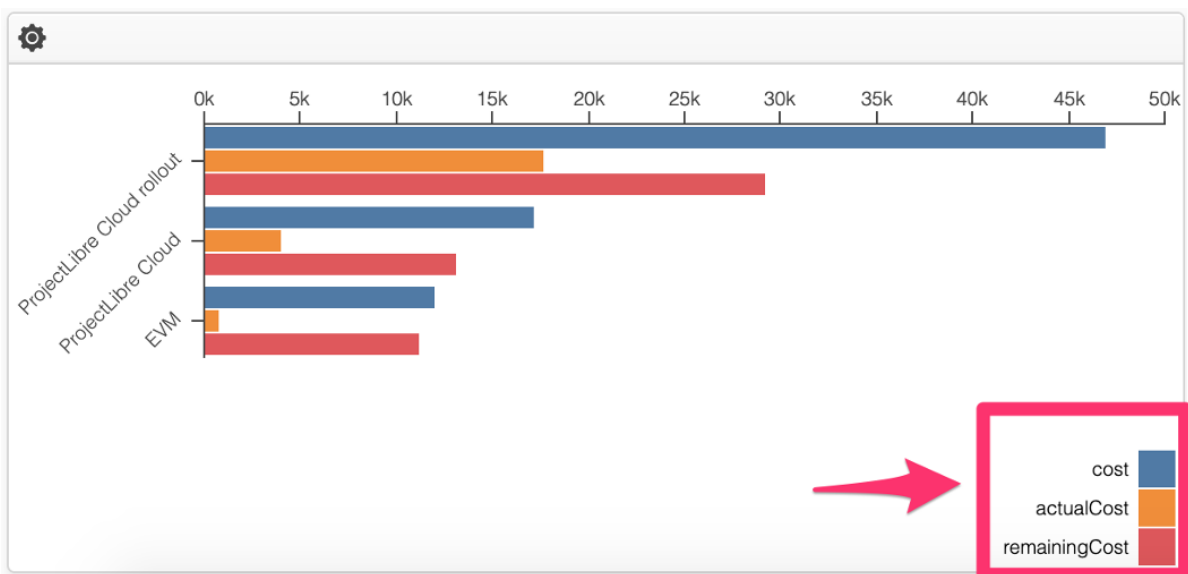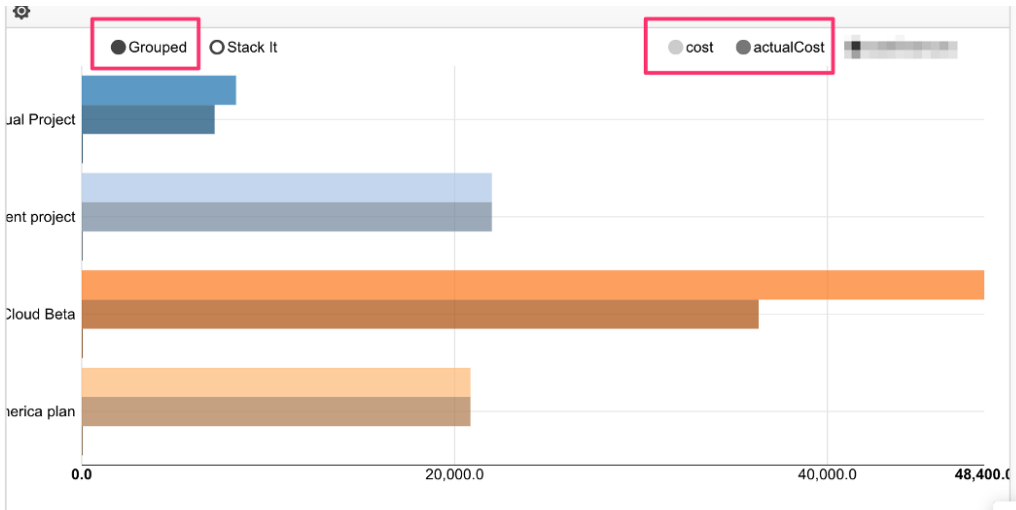
**Stacked Horizontal bar chart.** The same as the horizontal bar chart but the data is stacked
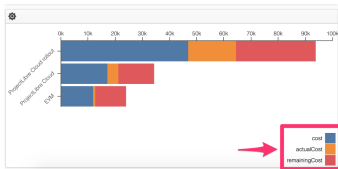


## Configure Pie Chart

The same Configuration for Field Lists as above:     When you cursor over a slice of the Pie chart you can see the data, the default field list is Cost.

The configuration and Field List is the same as noted above in the Bar Chart
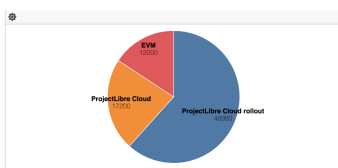


## Configure Donut Chart

The same Configuration for Field Lists as above:     Default field list includes Cost
The configuration and Field List is the same as noted above in the Bar Chart.
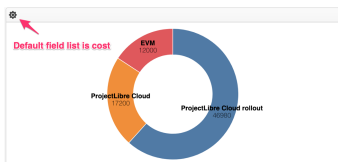


**Donut Chart: example showing completed tasks, Future tasks, on-schedule tasks , late tasks**

## Configure Bubble Chart

The same Configuration for Field Lists as above:  Need to correct, the default is (Priority, Benefit, Cost) added data and didn't show on graph

Risk vs Value and bubble size is cost

The configuration and Field List is the same as noted above in the Bar Chart

Example Bubble chart:  in this chart the legend displays the project selected and the display bubbles are project Cost.  The Horizontal and Vertical access display the bubbles based on Benefit and Priority.  The size of the bubble is reflected on the project data being displayed.  In this case project cost.

## Projects selected and Cost displayed
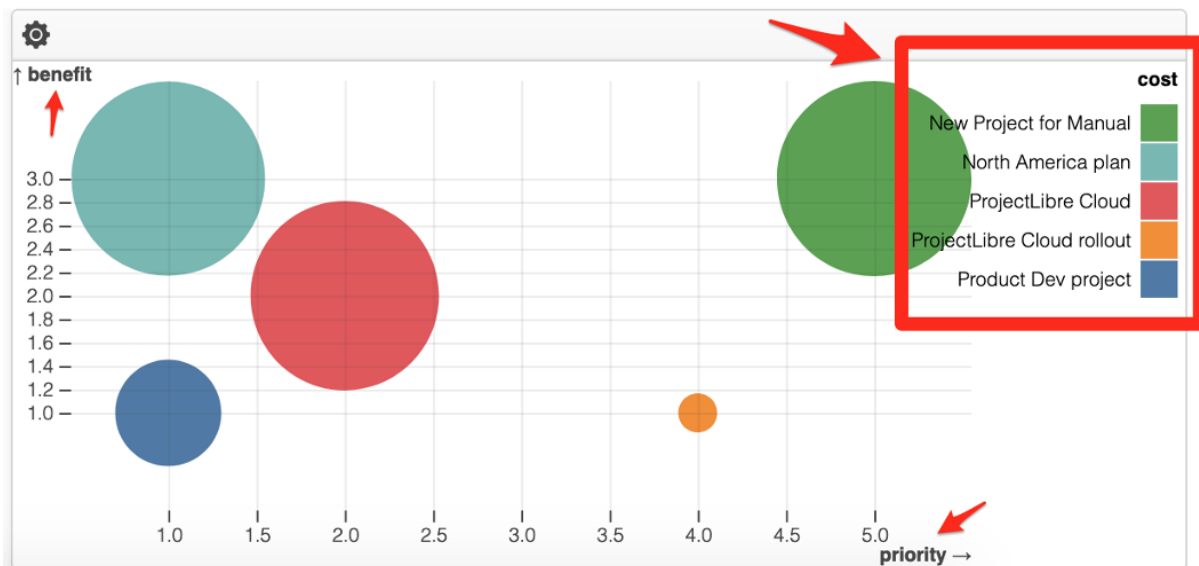


The same Configuration for Field Lists as above:

# Portfolio View

The Portfolio view displays all projects in the Portfolio.  They are represented by Summary Gantt Bars.  The view is similar to other views.  The data is summarized up to each project.  The Portfolio view has a very similar structure to the others with a few exceptions.
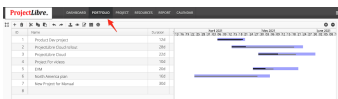


## Portfolio Gantt Chart View

The Portfolio view has a summarized Gantt Chart showing each project in the portfolio.  The Gantt view to the right can be Zoomed in (+) or Zoomed out (-) to different time scales.   The spreadsheet to the left can be configured as noted earlier by creating a new Field View and selecting that Field View to be displayed.  The menu bar is consistent with other views with the exception of Import Microsoft Project file, Open

As noted in the image below, you can open/import Microsoft Project files into ProjectLibre Cloud . (Note: you can also import desktop ProjectLibre files .pod and also import other projects saved as .mpx or .mpp)

Opening a project:  Select a project from the list of portfolio projects and click on

👁

Assign a Project Calendar:  Select a project from the list of portfolio projects and click

on 📅



Same as previous menus

Import Microsoft Project File

Open Project

Assign Project Calendar
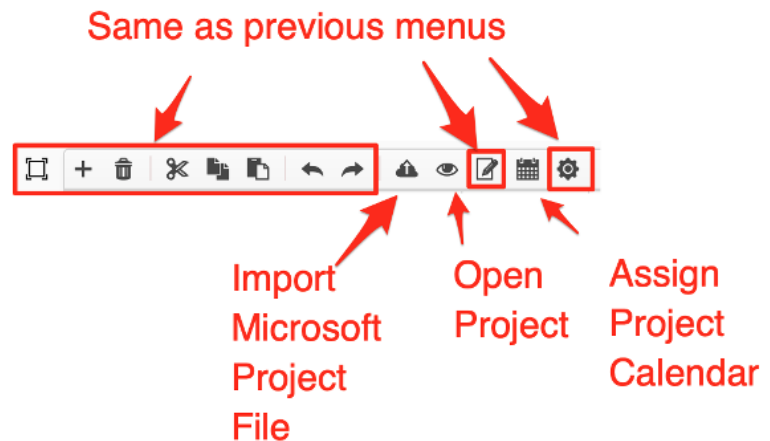
In the Portfolio View there is also a configuration option. This will set the spreadsheet columns to manage your portfolio.  The Field List sets the spreadsheet columns that are displayed.  The Default is Project Default.  We have covered previously creating new Field Lists and assigning to the View.
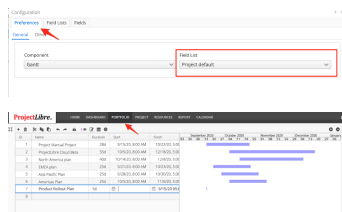


## Import Microsoft Project file ☁

ProjectLibre is compatible with Microsoft Project files along with existing desktop ProjectLibre (.pod) files.  (Note: ProjectLibre will import any standard .mpx or .mpp files.  However, there are many solutions that do not accurately export those formats which creates errors so double check).

When you click on Import Project icon you click Import and select your project and it

will appear in the Portfolio screen and you can select 👁 to open the newly **imported file will open.**

## Import ProjectLibre Desktop or Microsoft Project

In addition to creating new projects within ProjectLibre, you can import a desktop ProjectLibre (.pod) file , Microsoft Project files (.mpp or .mpx) , Primavera project file (.xer or .xml).   In addition, many programs export into the .mpx file format.  If exported in proper format (many products improperly export) in the .mpx format then ProjectLibre will also open those projects in your browser.

## Import project and map resources



In the Portfolio view, selecting the Import icon   opens the Import screen where you will select Import and display your file directory to select the project file to import.  Once again, you  can import a ProjectLibre .pod , Microsoft Project .mpx or .mpp Primavera project and many others.
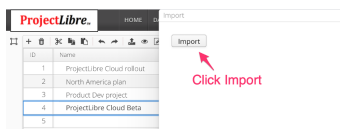


When the project file is selected you are given the option to either leave resource assignments Unassigned or map resources to the Cloud resource pool.      If choosing "Merge Using Fields" you can map the assigned resource to your Cloud resource pool.  You can choose which field is most effective to map the resources from the desktop project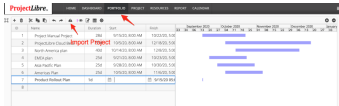 into your Cloud.  A few common examples are Name or Email.  This will match the data in the desktop resource assignment to a resource residing in the Cloud resource pool.

If you choose "Leave Unassigned" the project will import with placeholder assignments called Unassigned and you will switch them out with current resources or enter new resources.  Note: the hours assigned to a task from an "Unassigned" resource import so the work is imported.  However, as we don't know the resource particulars like cost that is not imported and you will need to update.

Once again,  leaving assignments "Unassigned" causes the work hours  assigned to Unassigned until you edit the project.  We recommend you ensure the resources are created in the Cloud prior to importing the project so you can map them automatically.

The other option is to Merge the resource pool from your desktop .POD file into your existing Resource pool.
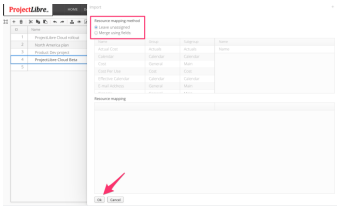
# Import and merging resources

## View of Desktop resource pool with assignments being imported.

This is an image of the desktop ProjectLibre resource pool which will be imported into ProjectLibre Cloud.



## View of Cloud resource pool

When the Project is imported into ProjectLibre Cloud the mapped resources will display under the Resources view. The information is imported and creates new resources or maps into your existing resources.
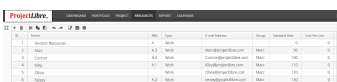


The above two images show the resource pools on the desktop and cloud in our example.
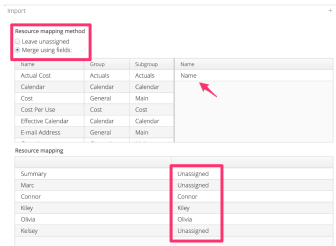
There is not an assignment Match for a couple of Resources so we can click on the "Unassigned" next to the resource and a dropdown list will display the available resources to map. In this case we are Selecting Marc and save. The project will now import using those resource costs and availability based on the Cloud settings. In this example, there is still an unassigned resource (Kelsey) from the desktop.
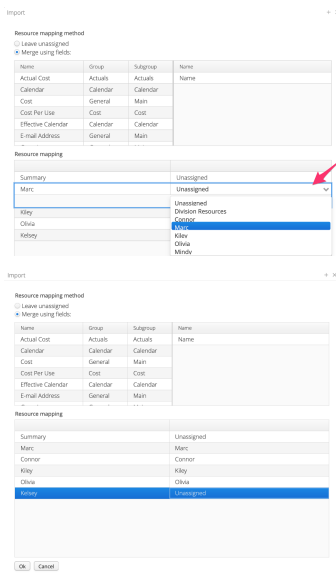


Click OK and the project is imported into ProjectLibre Cloud and displays in your Portfolio of projects.
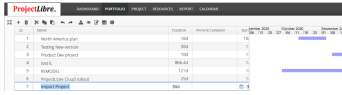
Simply open  the project and you are now managing your project in the browser.
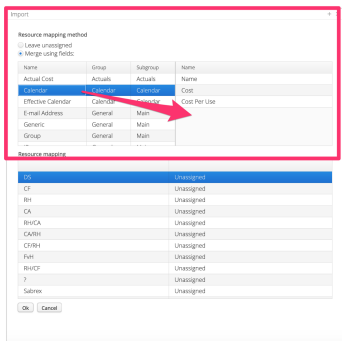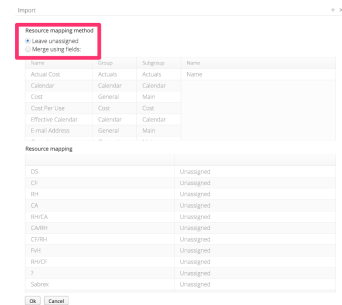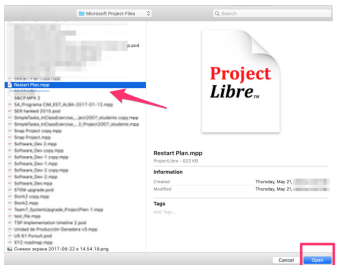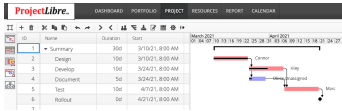










## Open Project

The Portfolio view has a list of your projects in the spreadsheet on the left.  When you select a project from the list there is an Open Project icon  When selected from the Portfolio view opens the selected project as a Gantt Chart in the Project view. There it can be managed as noted in the Project View section.
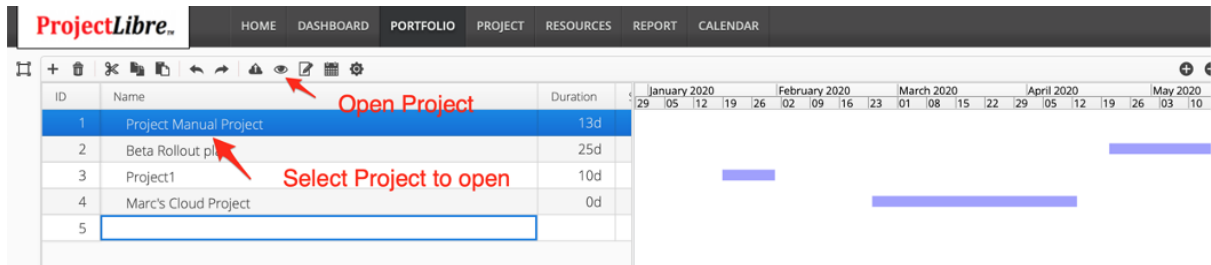


# Edit Project

The Edit Project icon  opens a dialog box with project level information.  When you view the Edit Project dialog box, many of the fields are calculated so 'view only' and not editable.  However, this is where you enter important project level information such as the project priority, Planning Status, Score, Schedule Status, Status Date and Start Date. The other data is calculated from the project.
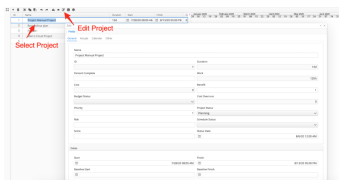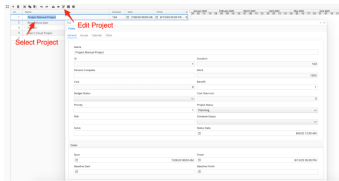




# Portfolio Calendar

In the Portfolio view, when you select the Calendar icon   It allows you to create Calendars for your organization.  These calendars can then be applied/associated with Projects, Tasks or Resources.  The Administrator role can both define calendars and also assign the "owners" of the calendars.  This ensures security of changing the calendar settings.  This is the central repository where the organization calendars are defined.

PROJECTLIBRE.COM

ProjectLibre has predefined calendars.  These include initial settings (can be edited):
- **Standard:** M - F working from 8:00 AM - 12:00 PM and then 1:00 PM - 5:00 PM (40 hour weeks)
- **Night:**  M-F working from X:00 - X:00 ???
- **24 Hour:**  7 day weeks 24 hours a day

These initial calendars can be edited and also new calendars can be created.
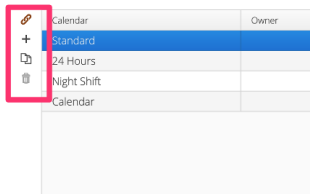


🔗  Set Item Calendar (need to figure out this one)

✛  Add new Calendar

🗐  Copy existing calendar and create new based on this calendar

🗑  Delete Calendar (must be owner/Administrator)

On the left side as noted above is the  i  icon.  When selected it creates a new calendar.  In this case we have created a new Calendar called "New Calendar for Manual" gave the Owner name as a project and kept the standard M-F work week.  The standard days of Saturday and Sunday are "Non-Working" days.

The new calendar is originally set with standard working days of Monday - Friday, from 8:00 - 12:00 and then 13:00 - 17:00.  In the standard calendar Saturday and Sunday are the only non-working days.   In the example below, we have also added an exception to the calendar and added August 10 as a Non-Working day even though it is on a Monday.  This will be covered below.
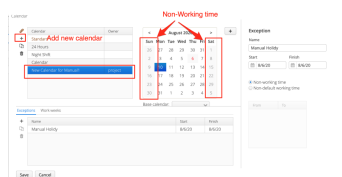


You can view or alter this with the Work Weeks option.  In this example, we have clicked on Monday and selected Non-Working day and saved.  You will notice in the new Calendar that Monday's are shaded 'grey' as non-working.  Project work will be affected and not be scheduled on Monday's.  The impact of this is a 40 hour task which could start on a Monday is pushed to start on Tuesday.  Thus the 40 hour task

which is based on 8 hours a day (5 working days) is scheduled for Tuesday, Wednesday, Thursday, Friday and then skips Monday again and commences start of day on Tuesday so the successor cannot start until Wednesday.
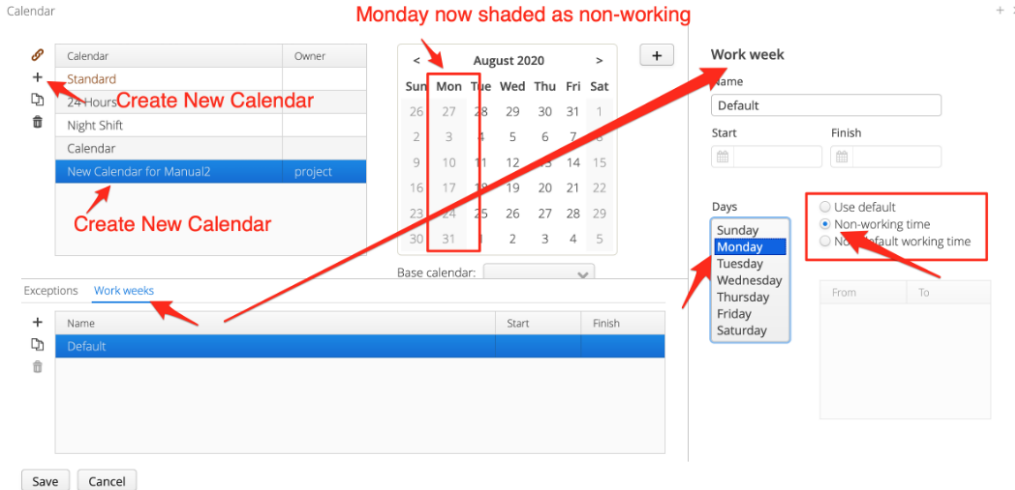


In

addition to the setting of standard Working days and Non-Working days.  You can set up Holidays that are also incorporated into the scheduling in the project.  In this instance we have shown August 19 as a Non-Working day.  It may be a national holiday, religious holiday or corporate holiday.  In all cases the ProjectLibre schedule algorithm will not schedule tasks on this date and push it to start on Thursday the 20th.



The "Calendar" is a very important feature in ProjectLibre, as it is the basis for all related calculations. Allocating a calendar early in the project is therefore considered important and effective.

The Calendar window opens normally with the standard working calendar for the present date, indicated as August  2020. The calendar can be moved forward and backward with the arrows in the top right corner.  You can select Calendars for the Project, Tasks and Resources. In this example we have also selected Exceptions.  We have created a St. Patrick's Day holiday and it is a Non-Work day.   You can also select non-standard dates to be working time.

The Default Work Week Calendar is Monday - Friday from 8:00 AM to 5:00 PM with an hour for lunch. This can be applied to the Project, Tasks and Resources. There is also a "Non-working time" and a "Non-default working time" calendar available. The project will schedule where all three calendars are in Working mode, otherwise you will see schedule acceleration (such as a Saturday is worked on all three relevant to the project) or delayed (if one or more calendars have exceptions with Non-Work days.

Other calendars can also be created. The "Standard" ProjectLibre calendar and your own previously saved calendar are available. If none of these "Standard" calendars offer the required working times for your project, ProjectLibre allows you to define and save your own calendar.

Note that when you try to modify the default time in any type of calendar, the "Non-Default Working Time" box is checked automatically. Thus, it is impossible to change the default time offered by the "Use Default" option.
A click on the + button (pops-up a new window to the right to define your own calendar with your choice of Working and Rest days and even working times. First, you are asked to provide a name for your new calendar (we have named Product Release Calendar), a relevant name that indicates the purpose of this calendar.



Window to create your own calendar

In this example we created the Calendar by clicking + and named it Product Release Calendar. We then selected Monday and "Non-Default Working Time". We then changed the To (or day end) to 19:00 from the standard 17:00 meaning we will work 10 hour days every Monday. Clicking on one particular day allows you to specify the type of day and the individual working hours e.g. Bank holidays. When all days, national and religious holidays are indicated and the working hours defined as required, the calendar will be created and saved by clicking "OK". In the future, it will be available in the list of calendars.

## Project View

The Project view displays information on the individual project selected in the portfolio view. The Project view will be displayed with the current project if ProjectLibre closes with this view active. When in the Portfolio view if a project is selected and the open icon is selected . This will open the selected project in the Project view. Again, it will also default display the last project selected if you log in again. There are 5 different views which can be selected to display the project information.
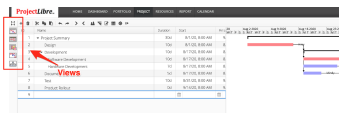
Configuration of Views: (this should not display on the Project view)

 Gantt Chart

 Project Spreadsheet

 Project Usage Spreadsheet

 Network Diagram

 Work Breakdown Structure (WBS)

**Gantt Chart**

In the "Views" section, the "Gantt Chart" button is already somewhat familiar, having introduced it earlier. Clicking on this icon brings up the default spreadsheet that is pre-configured with convenient columns for project management purposes - "Name", "Duration", "Start", "Finish", and the like. There are some unique features associated with this tailored spreadsheet on the lower left side of the Gantt page of ProjectLibre. A user can also configure different spreadsheets to display with the

As mentioned previously. Projects are opened from the Portfolio view. To create a new project enter the name in the portfolio spreadsheet and click on the Open Project icon.



This will open the Gantt chart in the Project view and will be empty.



## Enter Project tasks

The Project spreadsheet is the left pane of the view. You can Configure the spreadsheet views as noted below. The default spreadsheet consists of Name , Duration, Start, Finish and Percent Complete. Each column is separated by a vertical line which can be dragged to the left or right to either expand or collapse the

column width.  This is done by placing the cursor on the separator line with the cursor and right click while dragging.

Tasks can be entered in the Spreadsheet with information about each task as noted in the image below we have entered.  When a Task Name is entered and the return key is hit it proceeds to the next line.  It is quick to enter the tasks and the durations default to 1 day.



ProjectLibre defaults to 1d tasks but these can be changed.  A Summary structure or Work Breakdown Structure (WBS) can be created by indenting tasks. This creates a parent task and children tasks.  The Parent task or Summary task rolls up the information from the children's tasks.  This is done by selecting a child task and using the indent icon (arrow).  This indents the child task and creates an arrow next to the parent.  When the Arrow is selected it will collapse the child task.  The task disappears as it is collapsed but clicking on the arrow again will expand the task view.

The Summary tasks roll up the durations and costs from their child tasks so cannot be directly edited for duration.  The display as black bars on the Gantt chart.

In the example below the Task #2 is hidden so you see the Summary task and then Task #3 next.



Summary task bar is compressed hiding Task 2



Entering the durations is a matter of clicking in the spreadsheet cell and entering the task durations.  As noted here the rest of the task durations are entered.  Critical tasks will be represented in red, Non-Critical tasks in Blue and Milestones (Zero duration tasks) are diamonds.  The Summary Tasks will show spanning the duration of sub tasks



## Linking tasks (precedence relationships)

Then tasks are entered; they can be linked either graphically on the Gantt chart or in the spreadsheet based on predecessor or successor number. Linking tasks in the Gantt Chart is done by placing the cursor in the predecessor task and right clicking while dragging the cursor to the successor task. The cursor will turn into an + while in the predecessor bar and into a line with an arrow as you drag to the successor. When you release that cursor it establishes the precedence relationship. ProjectLibre defaults to Finish - Start relationship. This means when the Predecessor task is completed the successor task can start.



As noted above the second task starts when the predecessor is completed. If the predecessor moves this will affect the start of the successor task. The default Finish to Start the other relationships.

- Finish to Start (FS): Successor starts when predecessor is completed.
- Start to Start (SS): Successor starts when predecessor Starts
- Finish to Finish (FF): Successor finishes when Predecessor Finishes
- Start to Finish (SF): Successor finishes when Predecessor starts

The relationship type can be established either by entering in the spreadsheet or clicking on the link in the Gantt Chart. This will bring up a dialog box with a dropdown on Type where the relationship can be selected.
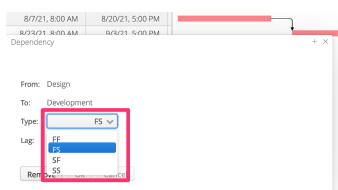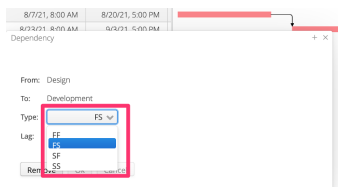
*Finish to Start Relationship*

*Finish to Finish relationship*

*Start to Start Relationship*
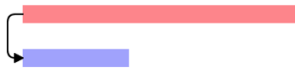
*Start to Finish Relationship*

When modeling a project it is important to also determine tasks that may not immediately schedule to the precedence relationship. A good example is if a task should start 2 days after the predecessor finishes. If you are waiting for paint to dry then successor tasks need to be delayed. In this case we can modify the FS relationship with a +2 day lag. If you click on the link you can also set the Lag which can be a + or - number. In this example it is FS +2 day lag.
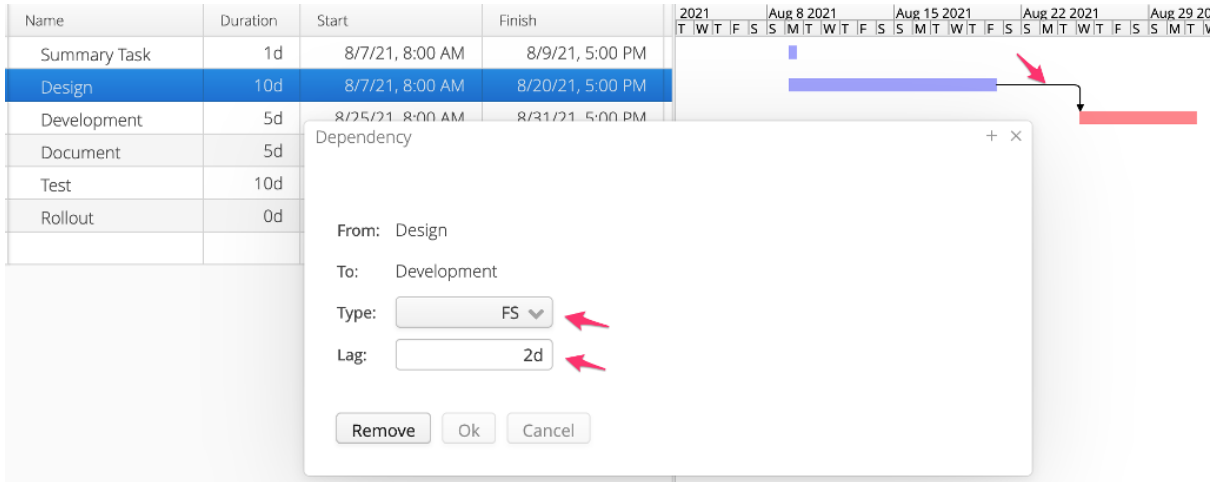
Another example of a negative lag (also called a lead), if you are laying concrete you may want to set a pole in the concrete before it is solid but not immediately. A -4hr lag would mean the successor task starts 4 hours before the predecessor finishes.
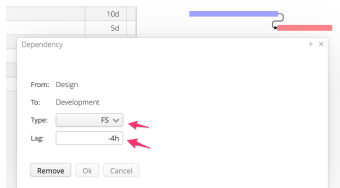


Summary Task

The Summary tasks are established when tasks are indented under their parent tasks. There can be unlimited indents which can be collapsed or expanded for detail.

Gantt Chart with Summary task expanded



Gantt Chart with Summary task collapsedAdd Task (click on an empty row in the spreadsheet and click icon. It adds a new task

🗑 Delete Task (click on a task and the icon, it will delete the task.

✂ 🖿 🗍 Cut, Copy and Paste (Cut, Copy and Paste work as conventional software.

Indent , Outdent (tasks)     (When clicking on a task and the Indent,  creates a Summary Structure under the task above.  This makes the selected task a child task to the parent task. It also establishes the Work Breakdown Structure (WBS).

Assign Resources:  When clicking on a task in the spreadsheet and the Assign Resources icon a dialog box appears with the list of Resources.  Selecting these with the check box and ok will assign the resources to the tasks.



# Gantt Chart icons



*View configuration*
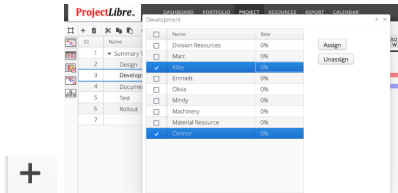


Baseline tasks or project:  when clicking the Baseline icon a separate dialog box pops up where you can baseline either the entire project or particular task which is selected.  You can also use the dropdown and select saving separate baselines 1 - 10 are also available.
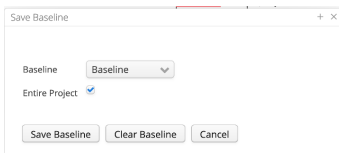


Export Project:  selecting this icon allows you to export the project to a local drive .  The format is a universal .xml format that can be opened in other programs.

# Export

ProjectLibre Cloud has advantages in your browser.  However, if you need to export to your desktop we understand.  If you are in the Project tab use the Export icon     and you can store locally.
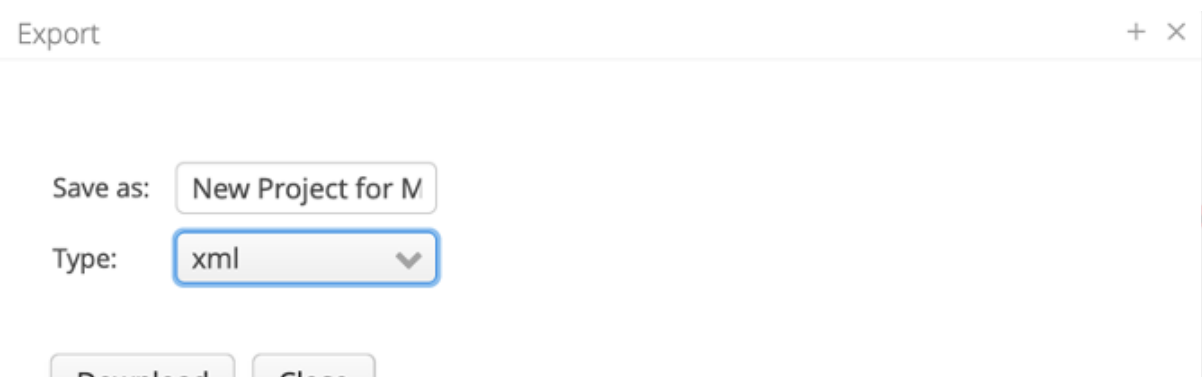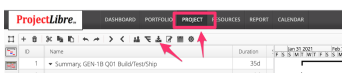
### ✎ Edit Task:

The Edit Task icon opens a detailed dialog box on the selected task. There are multiple dialog boxes and tabs. The default dialog box is Fields tab and General dialog box. This displays but also allows you to edit task information such as Duration, percent complete, priority etc.
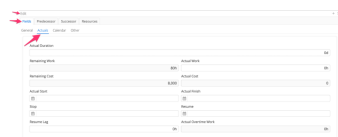
**Fields Dialog box**

Fields dialog box (General tab)



# Fields Dialog box (Actual Tab)

The Fields tab also has other tabs including the Actual Tab. This has fields which display and can be edited for Actual Duration , Actual Work , Actual Start, Actual Finish , Stop, Resume and Resume Lag. There are also calculated fields which are displayed. Those fields are greyed out and cannot be edited including Remaining Work, Remaining Cost, Actual Cost and Actual Overtime Work.



# Fields Dialog box (Calendar Tab)

The calendar tab displays the effective calendar for the task and also allows selecting a different calendar for each task. The default calendars are Standard, 24 Hour, Night Shift. Note, there is a check box for Ignore Resource Calendar. This is used to offset a potential conflict between a calendar assigned to this task and a calendar assigned to resources on the task. ProjectLibre takes the "common" time within the Project, Task and Resource calendars to schedule tasks. This check box will override this and schedule the task based on this selected calendar.
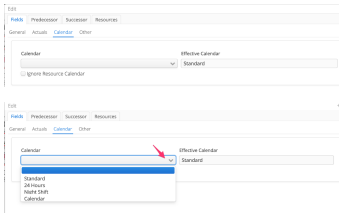
# Fields Dialog box (Other Tab)

The Other tab in Fields is primarily for display fields with Performance Management (Earned Value) fields.
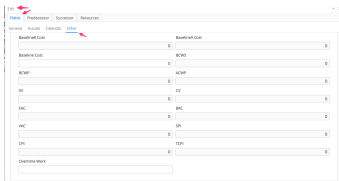


## Edit Task: Predecessor Tab

This tab displays the selected task predecessor.  You can change the precedence relationship in this dialog box from FS (default) to FF, SS, SF and also the Lag in the precedence relationship.
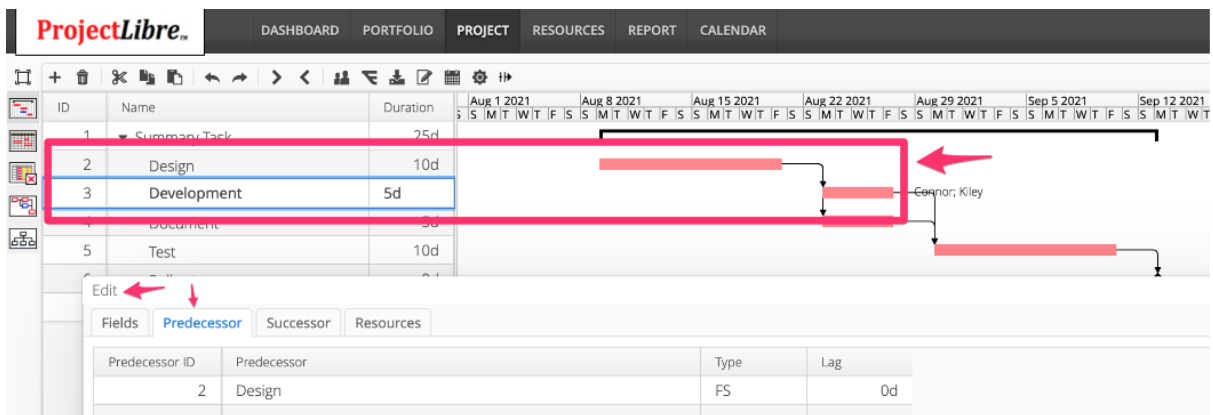


### Edit Task: Successor  Tab

This tab displays the selected task successor.  You can change the precedence relationship in this dialog box from FS (default) to FF, SS, SF and also the Lag in the precedence relationship.
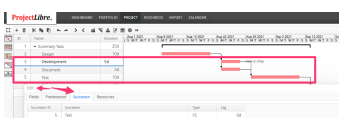


### Edit Task dialog box: Resource tab

The Edit Task and Resource dialog box displays the assigned resources on the selected task.  This particular dialog box displays the assigned resources to the task and can adjust the planned work on the task by the resource.   If a resource does not start on the task simultaneously with the task starting a Lag can be entered here so the resource starts working on the task with a Lag.
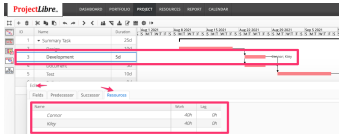


 **Calendar (task menu)**

The Gantt chart Calendar icon opens up a calendar for the task that is selected in the spreadsheet.  (this is different from the Project and Resource calendars).  The task calendar displays the created calendars.  The default calendar is 8 hours working time from  M-F with Sat and Sun as non-working days.  There is also a 24 hour calendar which is a 7 day a week working time.  A Night Shift calendar mirrors the Default calendar but the working time is evening but still M-F.
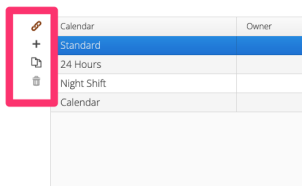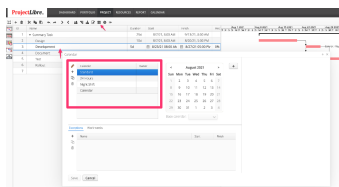




If you cursor over any icon it will give a brief description of the icon.

 	Set Item Calendar. When selecting a non-default calendar this sets the calendar for the task

**+** Add a Calendar: sets a new calendar line to define a new calendar

▯ Copy a Calendar: this creates a copy of the selected calendar and a quick start for editing without having to start from scratch

🗑 Delete calendar

Creating and editing a calendar. As noted in the image below the Standard Calendar is selected and a Sunday is also selected. The pane on the far right displays that Sunday is a non-Working day. You will also see all Sunday and Saturday columns are greyed out displaying the default they are non-working days.
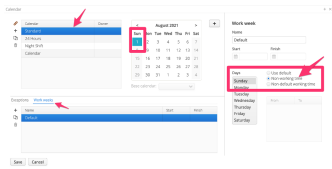


Calendar Standard Working day: You can see in the far right pane that Monday is selected and it is using the default which is a working day from 8:00 - 12:00 and 13:00 - 17:00.
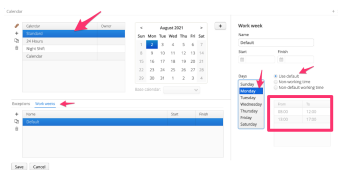


24 Hour calendar: When the 24 hour calendar is selected you will note there are no greyed out days (Saturday and Sunday are working days so not shaded). The far right pane shows all days have a 'non-default working time" that is from 0:00 - 0:00 which is 24 hours 7 days a week.
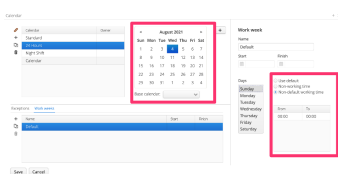
Night Shift:  The night shift is a copy of the Default standard calendar with hours working at night.

Calendar Exceptions:        In the image below we have copied the Standard calendar and named it Manual Calendar Example.  We have clicked on Exceptions which gives us the option to + add an exception , copy a previous exception or delete an exception.
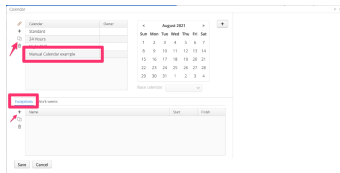


Adding an exception for Company party holiday, non-working
- Copy Calendar and rename
- Select calendar and + Exception
- Name the Exception and select the date (dates) and Add
- Save

In this example November 9th is a company party and is now not a day tasks can be scheduled for work.
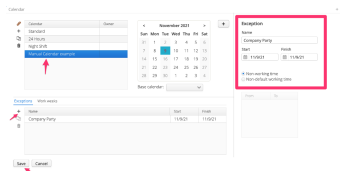


 **Gantt Chart field Configuration (Field lists)**

ProjectLibre spreadsheets are configured using Field Lists.  This Gantt Chart configuration dialog box brings up the Gantt Chart by default as the  Component and the Default field List.



List of fields:
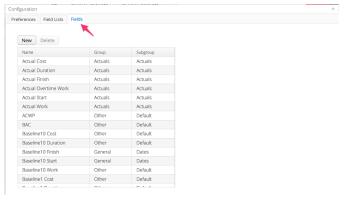
Create new custom fields:  ProjectLibre allows for the creation of custom fields.  They can be a text field, number, calendar and many others.
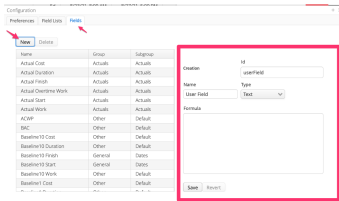


Field List:  when in the Gantt chart and select configuration it defaults to the Gantt Chart component and the Default field list ( spreadsheet columns).
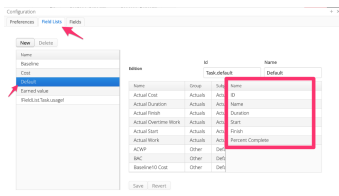


Edit Field List:  the list of all Fields is displayed in the middle pane.  The far right pane displays the fields in the Field List.  You can remove a field (spreadsheet column) by dragging it to the left and it is removed from the Field List and part of the Fields pane.   You can add a new Column by dragging a field into the Field list to the right.   We will select Actual Start and drag it below Percent Complete.  You can also rearrange the Field list order by dragging fields up and down in the list.  This will change how the spreadsheet displays in the Component.  In this case Gantt Chart.

We will add Actual Start to the Field list by selecting in the middle pane and dragging to the right and Save the Field List.
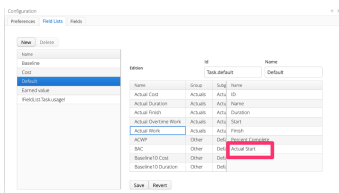


Gantt Chart modified spreadsheet:
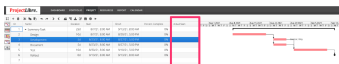


## Configure Gantt Chart

Gantt chart.  Clicking on the  configure ⚙ icon opens the configuration dialog box.
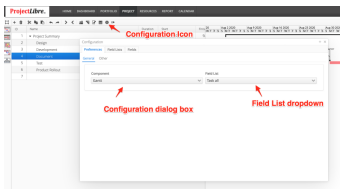


This configuration has the Gantt Component selected.  There is a drop down list to select which Field List you wish to have displayed in the spreadsheet.  You can also create a new Field List by clicking on the Field Lists tab.   Then click New and drag any fields in the order you wish.  You can name your new Field List and select your new List associated with the Gantt Chart in the Preferences configuration tab.  It will show on your Field List dropdown.  This feature allows the analyst to very flexibly tailor the Gantt chart contents for tracking the project.
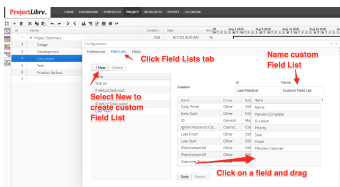


### ⊬⊪ Split Task:

 When this is selected you can click on the icon then a task.  The task will split.  You can place the cursor in the split task and further drag to the right or left creating a gap so the task is not continuously scheduled in case there is a gap in the scheduled task.
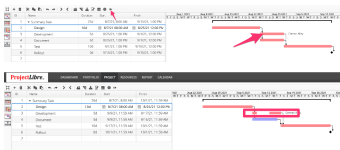


### ➕ ➖  Zoom In , Zoom Out:

The Gantt Chart default time scale is daily.
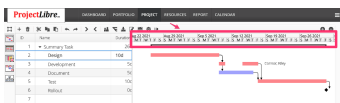
You can Zoom In +  to show the Gantt Chart timescale in 6 hour or even 2 hour increments
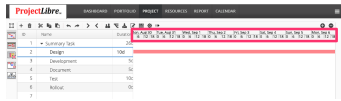


 You can Zoom Out  -  and display the same Gantt Chart in Week, Month, Quarter or 6 months.



## Project Spreadsheet View

 The Project Spreadsheet view essentially has the Gantt Chart spreadsheet without the Gantt Chart.

It is a key area to use the Configuration icon   and customize your Field List to enter project information effectively.
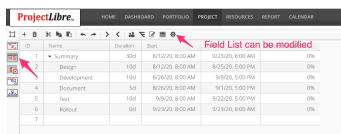


## Project Usage view
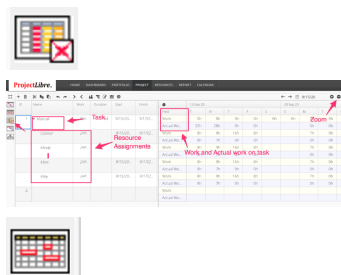






The next selection is the  "Project Usage" view which shows hourly work based on information entered. The left half (the spreadsheet half) of the view summarizes the total allocation of hours to each task while the right half (the schedule plan) shows the hourly profile of available workers' hours against chronological time.  Selecting the Configuration icon allows you to show or hide both Work and Actual work.  In this image we have selected to show both.

The next selection in the "Views" is the "Project Usage" view  which shows hourly work based on information entered. The left half (the spreadsheet half) of the view summarizes the total allocation of hours to each task while the right half (the

schedule plan) shows the hourly profile of available workers' hours against chronological time. The spreadsheet is identical to the Gantt chart spreadsheet previously described; the only difference appears to be the light tan background color for this information in the "Project Usage" view.

The right side of the view shows scheduled work. Observe that scheduled work for a task is the sum of the time allotted to the subtasks within each hierarchical layer. For example, the sum of the hours in the Project Summary task is 280 hours of work. This sums all the planned work hours for the sub-tasks.  It is possible to directly edit the hours on the right side of this view, but it is also quite possible (perhaps even likely) that doing so will alter the totals on the left side and may cause fractional hours or days to be incorporated into the schedule.
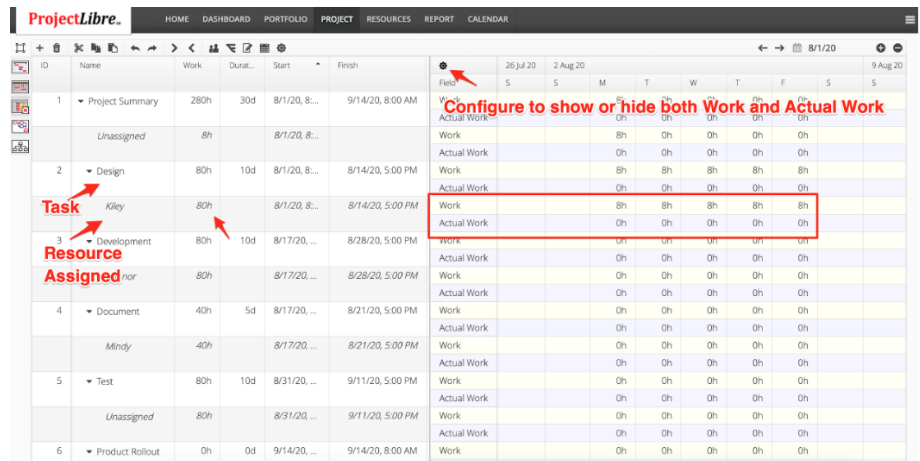


## "Task Usage" view
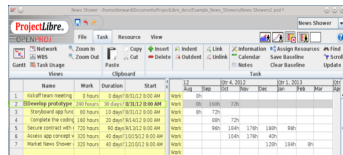


The next selection in the "Views" section of the command ribbon is the "Task Usage" view (figure 39), which shows hourly work based on information entered. The left half (the spreadsheet half) of the view summarizes the total allocation of hours to each task while the right half (the schedule plan) shows the hourly profile of available workers' hours against chronological time. The spreadsheet is identical to the Gantt chart spreadsheet previously described; the only difference appears to be the light tan background color for this information in the "Task Usage" view.

The right side of the view shows scheduled work. Observe that scheduled work for a task is the sum of the time allotted to the sub-tasks within each hierarchical layer. For example, the sum of the hours in lines 3 and 4 adds up the total hours for the parent task in line 2 (green rectangle) for each month of time. It is possible to directly edit the hours on the right side of this view, but it is also quite possible (perhaps even likely) that doing so will alter the totals on the left side and may cause fractional hours or days to be incorporated into the schedule.

## Zoom In or Zoom Out
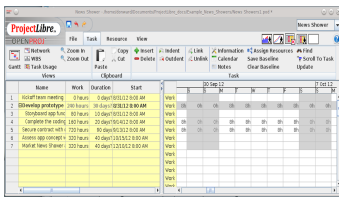


This last set of selections in the "Views" section control the time scale in the schedule (right) side of the Gantt chart. Left clicking on the "Zoom In" command can drive the schedule to show hours (still in the "Task Usage" view) for each day of the planned work (figure 40). Increments can go down to hours to be devoted each day to a given task by repeatedly selecting this command (figure 41); this level is the smallest time increment that the "Zoom In" command can select in any of the "Task Views".

## "Network Diagram" view
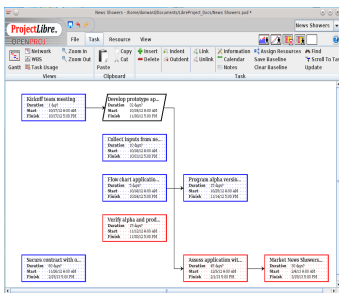


 "Network" view of task flow

Figure shows each of the tasks in our example project plan for "New Shower" in summary form. In one sense, this network view is very similar to the right side of the Gantt chart (figure 30); the information is the same. The "Network" view simply puts that information in a flow diagram form and relocates the information in each task row within the appropriate node/block. The analyst can also move the task nodes in the diagram to change the graphical presentation by clicking the cursor over the outline of the block to be moved and dragging the node. Left click and hold the left

mouse button down and reposition the selected block to any desired position within the white space. Similarly, if you hover the cursor over a location in the interior of a block and then left click, you can modify task data with keypad inputs.  The linkages between tasks are retained and the critical path is also marked with a red outline for those blocks. Linkages can also be added, removed, or modified in this view. If you hover the cursor over a task dependency connection line, a plus sign appears. Then a left mouse click pops up a dialog box (figure 35) that allows you to alter the connection as desired. This dialog box lays out the From-To dependency sequence, providing both labels for clear identification. Then it offers four possible dependency connection types: FS (the default option), FF, SF, and SS. FS stands for Finish-to-Start (of the From task to the To task), FF implies Finish-to-Finish, SF indicates Start-to-Finish, and SS means Start-to-Start. The choice of connection types obviously alters the flow of the work between tasks. The default choice is by far the most common usage. Notice that this dialog box also allows addition of lag (if a positive number a delay before the next task starts or if negative the second task starts before the finish of the predecessor) The lag time between tasks is a numerical value in either hours or days or other appropriate time unit. The lower row of four selections allows you to completely remove the linkage, accept changes made, cancel your operation, or go to the on-line help documentation which is located at the ProjectLibre website when you are logged into the community site.
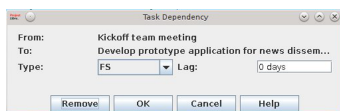


Finally, the "Network" view does not show the chronology of the tasks quite as completely (there is no calendar – merely start and finish dates – showing the progression of tasks).

"Network Diagram" view:



70
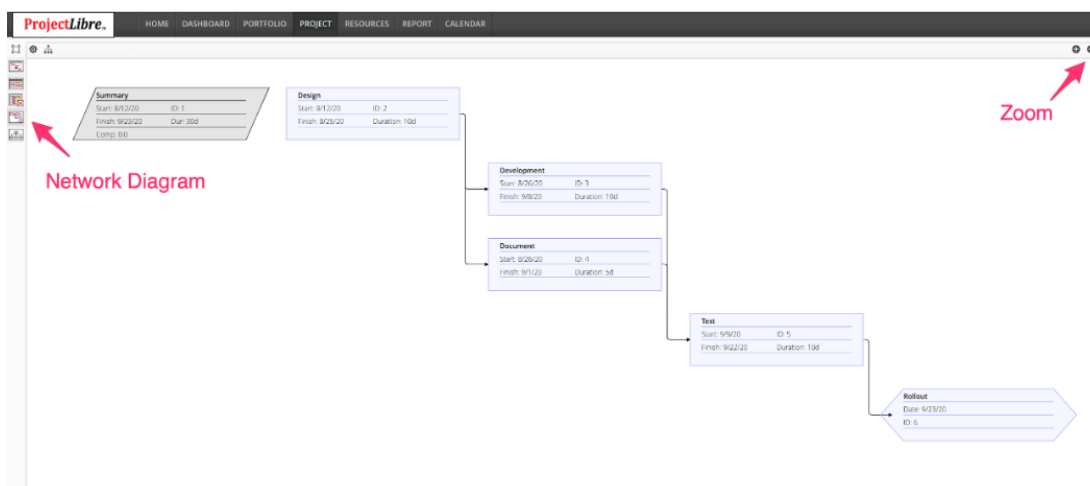
You can also manage your project within the Network Diagram. Clicking on a Link opens the Precedence dialog box. There is a drop down box to change the precedence relationship from Finish to Start (FS) to Finish to Finish (FF) , Start to Start (SS) or Start to Finish (SF). The dialog box can also be used to enter the relationship Lag.
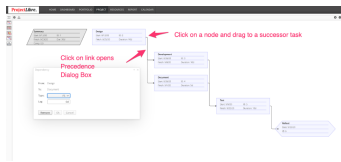


"Network" view of task flow

The Network Diagram shows each of the tasks in our example project plan for "Product Rollout Plan" in summary form. In one sense, this network view is very similar to the right side of the Gantt chart; the information is the same. The "Network" view simply puts that information in a flow diagram form and relocates the information in each task row within the appropriate node/block. The analyst can also move the task nodes in the diagram to change the graphical presentation by clicking the cursor over the outline of the block to be moved and dragging the node. Left click and hold the left mouse button down and reposition the selected block to any desired position within the white space. Similarly, if you left click, you can modify task data with keypad inputs.

The linkages between tasks are retained and the critical path is also marked with a red outline for those blocks. Linkages can also be added, removed, or modified in this view. If you hover the cursor over a task dependency connection line, a plus sign appears. Then a left mouse click pops up a dialog box that allows you to alter the connection as desired. This dialog box lays out the From-To dependency sequence, providing both labels for clear identification. Then it offers four possible dependency connection types: FS (the default option), FF, SF, and SS. FS stands for Finish-to-Start (of the From task to the To task), FF implies Finish-to-Finish, SF indicates Start-to-Finish, and SS means Start-to-Start. The choice of connection types obviously alters the flow of the work between tasks. The default choice, FS, is by far the most common usage. Notice that this dialog box also allows addition of lag (if a positive number a delay before the next task starts or if negative the second task starts before the finish of the predecessor) time. The lag between tasks is a numerical value in either hours or days or other appropriate time units. The lower row of four selections allows you to completely remove the linkage, accept changes made, and cancel your operation.

In one sense, this "Network" view is very similar to the right side of the Gantt chart ; the information is the same. The "Network" view simply puts that information in a flow diagram form and relocates the information in each task row within the appropriate block. The analyst can also move the task blocks in the diagram to change the graphical presentation by hovering the cursor over the outline of the block to be moved and waiting until a hand icon appears. Left click and hold the left mouse button down and reposition the selected block to any desired position on the white space. Similarly, if you hover the cursor over a location in the interior of a block and then left click, you can insert additional text or corrected text with keypad inputs.

The linkages between tasks are retained and the critical path is also marked with a red outline for those blocks. Linkages can also be added, removed, or modified in this view. If you hover the cursor over a task dependency connection line, a plus sign appears. Then a left mouse click pops up a dialog box that allows you to alter the connection as desired. This dialog box lays out the From-To dependency sequence, providing both labels for clear identification. Then it offers four possible dependency connection types: FS (the default option), FF, SF, and SS. FS stands for Finish-to-Start (of the From task to the To task), FF implies Finish-to-Finish, SF indicates Start-to-Finish, and SS means Start-to-Start. The choice of connection types obviously alters the flow of the work between tasks. The default choice is by far the most common usage. Notice that this dialog box also allows addition of lag (free) time between tasks with a numerical value in either hours or days or other appropriate time units. The lower row of four selections allows you to completely remove the linkage, accept changes made, cancel your operation, or go to the on-line help documentation (which is still being developed for ProjectLibre at this writing).

Finally, the "Network" view does not show the chronology of the tasks quite as completely (there is no calendar – merely start and finish dates – showing the progression of tasks).
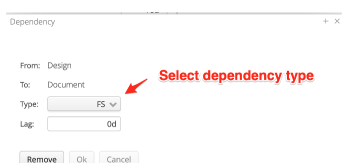


"Task Dependency" modification dialogue box

Finally, the "Network" view does not show the chronology of the tasks quite as completely (there is no calendar – merely start and finish dates – showing the progression of tasks).

**Work Breakdown Structure:**



Work Breakdown Structure (WBS) view of tasks

This is the default chart that appears when the WBS icon is selected. This diagram is similar to the "Network" flow view of the tasks in that each block is separate. However, the textual entries inside the block are related to blocks in the original Gantt spreadsheet, in the example shown. This chart can be modified in much the same way as the "Network" view chart. Left clicking on textual material in a block allows modification of the text. Also, hovering the mouse over a block outline allows the block to be moved.   Users can modify the information in the blocks by selecting the configuration icon

This chart can be modified in much the same way as the "Network" view chart. Left clicking on textual material in a block allows modification of the text. Also, hovering the mouse over a block outline allows the block to be moved. For example, the image above shows the task blocks for our example project laid out in a horizontal configuration.

It might suit your purposes better and be more descriptive to arrange the WBS in a vertical fashion.  Moving the blocks is carried out just as described in the "Network" view paragraph: hover the cursor over the outline of the block to be moved, then left click-and-drag the block to the desired position. The connection lines can be altered similarly to how modifications are described for the Network view linkages. Of course, the dialogue box is slightly different and the analyst can only remove the hierarchical relationship (equivalent to selecting "Outdent" in the command line for the subtask) or accept it.

One final note: when the narrative in the boxes (the task descriptions, for example) exceeds the width shown in the box, a left mouse click with the cursor simply inside the text area will show the rest of the line of text. This "peek-to-the-right" trick also works in the "Network" view of the previous paragraph. In that case, it is helpful to be sure the cursor is on the line of text to be extended for viewing.

Work Breakdown Structure:

Figure 37 is the default chart that appears when the WBS (blue ellipse in figure 36) selection is made with a left mouse click. This diagram is similar to the "Network" flow view of the tasks in that each block is separate. However, the textual entries inside the block are related to blocks in the original Gantt spreadsheet, in the example shown "Cost" (implying that as costs are entered during the course of a project's life, they can be monitored by the analyst and/or manager from this block) and "Budget". Notice that this second entry is blank; if we add a budget column. We do this by left clicking the mouse on the title row of the spreadsheet. You will have the option to Add Column and a series of columns to add. Select the Budget option.

Work Breakdown Structure (WBS) view of tasks



This chart can be modified in much the same way as the "Network" view chart. Left clicking on textual material in a block allows modification of the text. Also, hovering the mouse over a block outline allows the block to be moved. For example, figure 36 shows the task blocks for our example project laid out in a horizontal configuration.

Work Breakdown Structure (WBS) – Tasks rearranged

It might suit your purposes better and be more descriptive to arrange the WBS in a vertical fashion (figure 37). Moving the blocks is carried out just as described in the "Network" view paragraph: hover the cursor over the outline of the block to be moved, then left click-and-drag the block to the desired position. The connection lines can be altered similar to how modifications described for the Network view linkages. Of course, the dialogue box is slightly different (figure 38) and the analyst can only remove the hierarchical relationship (equivalent to selecting "Outdent" in the command line for the subtask) or accept it.
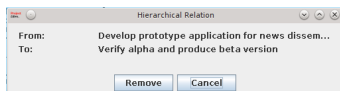


Hierarchical Relation" dialog box

One final note: when the narrative in the boxes (the task descriptions, for example) exceeds the width shown in the box, a left mouse click with the cursor simply inside the text area will show the rest of the line of text. This "peek-to-the-right" trick also works in the "Network" view of the previous paragraph. In that case, it is helpful to be sure the cursor is on the line of text to be extended for viewing.

## WBS

the default chart that appears when the WBS selection is made with a left mouse click. This diagram is similar to the "Network" flow view of the tasks in that each block is separate. However, the textual entries inside the block are related to blocks in the original "Gantt" spreadsheet, in the example shown "Cost" (implying that as costs are entered during the course of a project's life, they can be monitored by the analyst and/or manager from this block) and "Budget". Notice that this second entry is blank; if we add a "Budget" column.

This chart can be modified in much the same way as the "Network" view chart. Left clicking on textual material in a block allows modification of the text. Also, hovering the mouse over a block outline allows the block to be moved. For example, shows the task blocks for our example project laid out in a horizontal configuration.
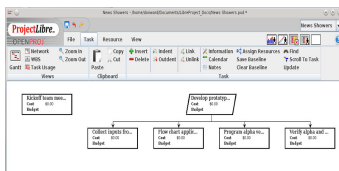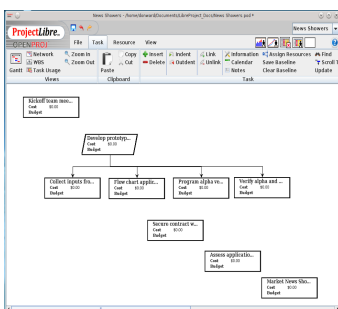
It might suit your purposes better and be more descriptive to arrange the WBS in a vertical fashion. Moving the blocks is carried out just as described in the "Network" view paragraph: hover the cursor over the outline of the block to be moved, then left click-and-drag the block to the desired position. The connection lines can be altered similar to how modifications described for the "Network" view linkages. Of course, the dialogue box is slightly different and the analyst can only remove the hierarchical relationship (equivalent to selecting "Outdent" in the command line for the sub-task) or accept it.

One final note: when the narrative in the boxes (the task descriptions, for example) exceeds the width shown in the box, a left mouse click with the cursor simply inside the text area will show the rest of the line of text. This "peek-to-the-right" trick also works in the "Network" view of the previous paragraph. In that case, it is helpful to be sure the cursor is on the line of text to be extended for viewing.
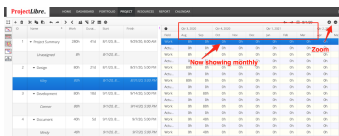
**Zoom In or Zoom Out:**



Zoom out to Monthly

This last set of selections in the various "Views" control the time scale in the schedule (right) side of the Gantt chart. Left clicking on the "Zoom In" command can drive the schedule to show hours (still in the "Project Usage" view) for each day of the planned work. Increments can go down to hours to be devoted each day to a given task by repeatedly selecting this command; this level is the smallest time increment that the "Zoom In" command can select in any of the "Task Views".



Zoom Out on Gantt chart view

"Zoom Out" obviously resets the time scale on the right side of the Gantt chart in the opposite direction as Zoom In. This pair is quite useful in setting the scales to evaluate the critical path in the basic Gantt chart.. This graphic shows the schedule for the entire example "Product Rollout Plans" projectto total length of 30 days. Of course, you can use these two commands to help size a Gantt chart for printing in a report or to examine the details of how work is scheduled.

## Clipboard:

Cut/Copy/Paste:

The "Clipboard" section of the "Task" command ribbon has only three possible selections: (1) Cut , (2) Copy, and (3) Paste. The names are descriptive of what each selection does. To use these functions for the Gantt chart spreadsheet the analyst must simply highlight the desired row by left clicking in the first column of the spreadsheet; the selection turns black to show what is selected. Once the desired row is highlighted, left click on Copy, move the cursor to the row on the spreadsheet where you want to insert the duplicate row and left click to highlight the desired location, and then left click on Paste. The "Cut" command can be used to remove a highlighted row in the spreadsheet.

Undo / Redo

While the "Cut" command can be used to remove a highlighted row in the spreadsheet, if the row was recently "Pasted",the same effect can be achieved by selecting the "Undo" command in the ProjectLibre command ribbon; this selection simply reverses the last issued command. The arrow just to the right of this "Undo" arrow is the "Redo" arrow and it reverses the action of the "Undo" arrow.

Otherwise, the actions of these two commands are similar to the standard usage.

Quite clearly, ProjectLibre provides more than one command to accomplish similar functions.

**Tasks:**

## Insert and delete:

These two commands allow insertion of a new row immediately above a selected row in the main Gantt spreadsheet or deletes the currently selected row. If you left click on a row, the row or column is highlighted and choosing "Insert" enters a new blank row immediately above.. If you then enter information for a new task or sub-task, the spreadsheet rows are all renumbered to show the new sequence as you inserted them.

Selecting an active task row in the spreadsheet and clicking on "Delete" in a similar fashion deletes the selected row and again renumbers the row in sequence. Note that selecting a row for use of either "Insert" or "Delete" can be done in any column on the left hand Gantt spreadsheet and the command action is still carried out for the entire row.

**Split Task**:
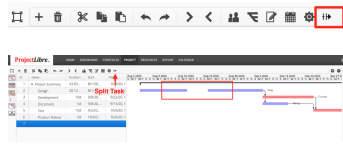


The Split Task function allows you to create a split of a task giving it a non contiguous duration. You can click on the icon and then click on a task bar. It will split the task at the location of the click and then you can drag the second part of the task to the right to create a gap or split duration. Moving the cursor to one of the blocks on the schedule (right hand) side of the Gantt chart and left clicking splits the designated block into two parts. Splitting a block can be applied to any of the main blocks (not the black schedule bar). This feature allows repetitively accomplished task events to be shown on the Gantt schedule.

**Information:**

<span style="color:red">This has not been implemented yet</span>

The "Information" command (yellow rectangle) was introduced earlier to discuss annotation styles in the previous paragraphs. Now we need to look at each of the tabs and explain the functionality they provide.

A task must be marked before the Information function is started, alternatively after a click on the "Information" button, select a task before a new window will open. When the information window has opened, we start with the "General" tab which is an alternative way to fill in the most important information about project tasks in one convenient menu. You can enter/edit task information: Duration, Start Date and Time, Finish Date and Time, Percent Complete (blank until entered), whether the duration is estimated or not (? indicates estimated), the amount of work to be done (usually in hours or days), priority assigned to the task (a numerical value between 0 and 1000), and Baseline information (Start and End) - once a baseline schedule has been agreed upon and entered. Our starting entries (so far entered directly on the spreadsheet for our Product Rollout Plans example) are displayed on this "General" tab.

To use the "Information" command properly, first select a task as suggested in, where the kick-off task is highlighted in black by left-clicking on the 1 in column 1 of the "Gantt" spreadsheet (left side). If you select more than one task row and then click on the "Information" command, a warning box will remind you that only one task can be edited at a time with this approach. Once a single task is properly selected, clicking on the "Information" command brings up the dialogue box with the "General" tab selected by default.
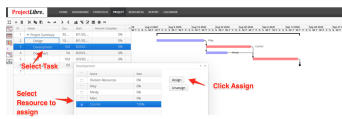
**Assign Resources:**

ProjectLibre has a good feature in the assignment of resources to tasks, after which ProjectLibre will use these assigned resources to optimize the schedule. Click on "Resources" in the Menu and a window appears to assign resources to tasks. The best practice is to first select a task before the "Resources" window opens, so that the details of the task are already filled in. Alternatively you may select the tasks after the window is opened.

ProjectLibre defaults to assigning a resource as 100% dedicated, however, you can alter that in this dialog box. If someone is only allowed to work on the task part time.. Note: a 10 day task with a standard calendar is an 80 hour task. If a resource can only work 4 hours a day on the task (50%) the duration will extend to 20 days. The Work is still only 80 hours but the elapsed duration is extended.

You can also Unassign a resource via this dialog box.



Resources assignment window

Additional persons or resources can be added, just mark the resource and click on "Assign". A new resource is added with a standard of 100% input; this however can be changed to click on the percentage and type the number or click the up or down small arrows.
A person or resource can be changed from this task by marking the resource and clicking on "Unassign" or "Replace".
A new window with all available resources will open to allow you to select the new name. After selecting the proper resource (name), clicking "OK" is sufficient to make the change. George will replace Jean. George comes with a 100% effort, which can be changed as explained before.
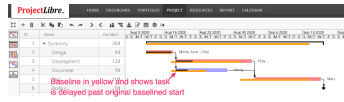
## Save Baseline



With the project progressing, you will notice that the actual schedule starts deviating from the start schedule. In order to be able to review the changes later, it is possible to freeze and save up to 10 baseline schedules at different times with its name. If your project has some milestones that would be a good time to create a baseline. The baseline saves all schedule, resource and cost information at that time. It is recommended you create an initial baseline prior to launching your project. This will allow you to compare the planned project schedule and costs with the current state. If you want a revised baseline during the project perhaps due to a change in project scope, you can save another baseline as Baselines (1 -10)
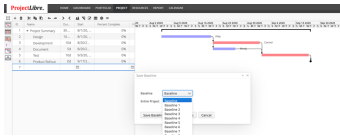
"Baseline" window



Click on "Save Baseline" in the menu bar. A new "Baseline" window opens and allows you to select a name for a baseline from this moment for the whole project or for just those actions that are selected. Click on "OK" to confirm and the baseline schedule is saved.

Later you can evaluate the different stored baselines. The "Product Rollout Plan" project had a basic schedule of 30 days till the launch of the product and a baseline was made, see greyish bar of smaller heights under the main task bars. The contract discussions with the production company started only after the "Design" session and Development.

An optimisation session with all involved was made during the "Design" session and it was concluded that the main part of the Product would have scope increased. So an additional schedule of 3 days was added and this was saved as Baseline 1, in yellowish color, in the right part of this Gantt diagram.

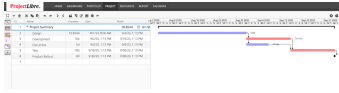**Add 3 days to Development and new graphic**



### Clear Baseline

A click on "Clear Baseline" brings a similar window on your screen. Now you can mark any made baseline and remove it. Confirming with an "OK" will remove it.
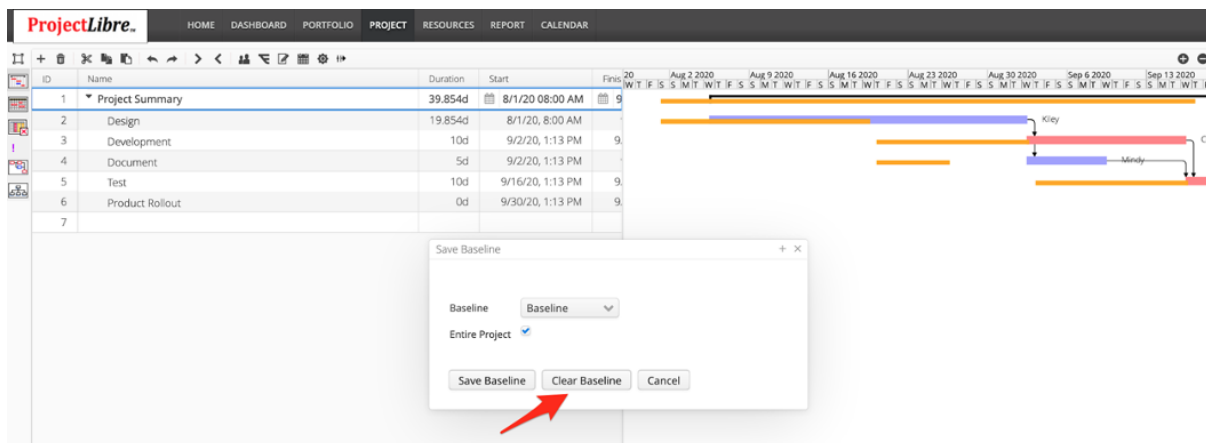


**Baseline is cleared, get new image**

## Edit Task Detail :



The "Edit" Task icon command gives details on the tasks and can be edited. We need to look at each of the tabs shown and explain the functionality they provide.

You have to select a task before the Edit function is started, alternatively after a click on the "Edit" icon, select a task before a new window will open. When the information dialog has opened, we start with the "General" sub-tab under the Edit Task icon, the default tab that appears when the "Edit" tab is selected with the mouse. This tab is an alternative way to fill in the most important information about project tasks in one convenient menu. You can enter/edit task information: Duration, Start Date and Time, Finish Date and Time, Percent Complete (blank until entered), whether the duration is estimated or not (? indicates estimated), the amount of work to be done (usually in hours or days), priority assigned to the task (a numerical value between 0 and 1000), and Baseline information (Start and End) - once a baseline schedule has been agreed upon and entered. Our starting entries (so far entered directly on the spreadsheet for our New Shower example) are displayed on this "General" tab.

To use the "Edit" command properly, first select a task, where the Design task is highlighted by clicking on the Design task on the "Gantt" spreadsheet (left side). Once a single task is properly selected, clicking on the "Edit" command brings up the dialogue box with the "General" tab selected by default.
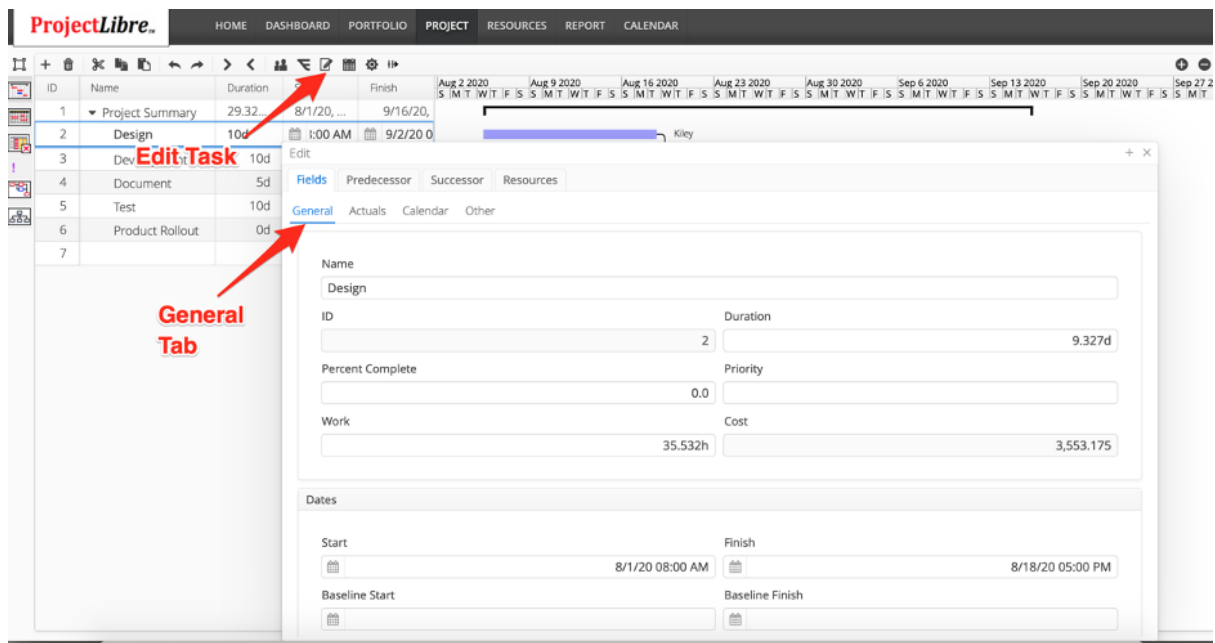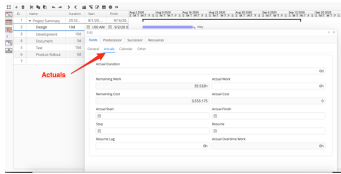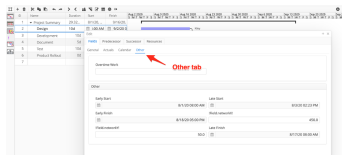
The Actuals sub-tab in the Edit Task allows you to enter and view actual costs, work and enter Overtime costs
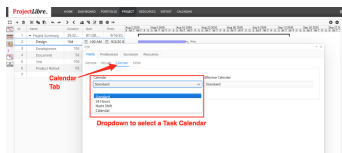


The Calendars sub-tab has a dropdown menu to select the calendar for the task.



The Other sub- tab essentially has the schedule information but Overtime Work can also be entered.

The Predecessor tab displays the predecessor to the task selected in the spreadsheet. In this instance we have Development selected and as noted, Design is the predecessor. The task predecessor type and lag can be updated. In this image it is a Finish to Start (FS) relationship with 0 lag.
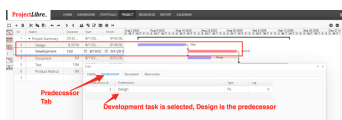


Successor Tab is similar to the Predecessor Tab. In this example we have selected the Design Task and as noted Development and Documentation are both successors. The relationship type is again defaulted to Finish to Start (FS) and there is no lag.

## Calendar



The "Calendar" is a very important feature in ProjectLibre, as it is the basis for all related calculations. Allocating a calendar early in the project is therefore considered important and effective.
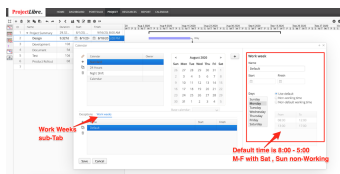
The Calendar window opens normally with the standard working calendar for the present date, indicated as August 2020. The calendar can be moved forward and backward with the arrows in the top right corner. You can select Calendars for the Project, Tasks and Resources. In this example we have also selected Exceptions. We have created a St. Patrick's Day holiday and it is a Non-Work day. You can also select non-standard dates to be working time.
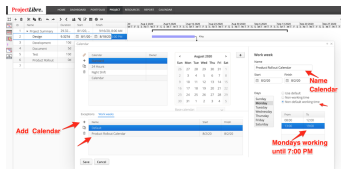


The Default Work Week Calendar is Monday - Friday from 8:00 AM to 5:00 PM with an hour for lunch. This can be applied to the Project, Tasks and Resources. There is also a "Non-working time" and a "Non-default working time" calendar available. The project will schedule where all three calendars are in Working mode, otherwise you will see schedule acceleration (such as a Saturday is worked on all three relevant to the project) or delayed (if one or more calendars have exceptions with Non-Work days.

Other calendars can also be created. The "Standard" ProjectLibre calendar and your own previously saved calendar are available. If none of these "Standard" calendars offer the required working times for your project, ProjectLibre allows you to define and save your own calendar.

Note that when you try to modify the default time in any type of calendar, the "Non-Default Working Time" box is checked automatically. Thus, it is impossible to change the default time offered by the "Use Default" option.
A click on the + button (pops-up a new window to the right to define your own calendar with your choice of Working and Rest days and even working times. First, you are asked to

provide a name for your new calendar (we have named Product Release Calendar), a relevant name that indicates the purpose of this calendar.



Window to create your own calendar

In this example we created the Calendar by clicking + and named it Product Release Calendar.  We then selected Monday and "Non-Default Working Time".  We then changed the To (or day end) to 19:00 from the standard 17:00 meaning we will work 10 hour days every Monday.  Clicking on one particular day allows you to specify the type of day and the individual working hours e.g. Bank holidays. When all days, national and religious holidays are indicated and the working hours defined as required, the calendar will be created and saved by clicking "OK". In the future, it will be available in the list of calendars.

In a large project it might be difficult to find a certain task in the Calendar View. A "Find" feature makes this easier; click on "Find" in the "Task" command. Type your "find keyword" or part of it, then select the field it will be in (in this example "Name") and click the green or blue button; the green button will search in the rows below your mouse cursor, while the blue button will search in the rows above your mouse cursor. The found task will be highlighted in grey, if it exists.



**Scroll to Task**
**For larger projects, the scheduling bars in the right side of the Gantt chart might have moved out of sight. You have to mark that task you want to see the scheduling bar for and click on the "Scroll to Task" button in the "Task" command which will bring the bar within the screen.**

**Update Tasks**
**Making a project schedule is one, but the actual reporting of actual progress is a necessary second. ProjectLibre is only able to forecast an accurate project finish date if all progress on the task is updated regularly.**
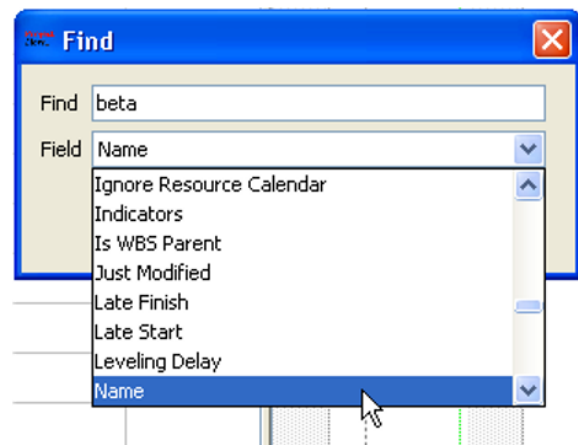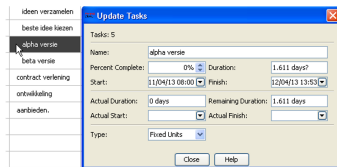
Updates on the current progress

The "Update" button, in the "Task" command, pops-up an "Update Tasks" window. The most effective use is to first mark the task as then the window is already filled with the details of the selected task. You may change the percentage to the actual one or fill the "Actual Start and Finish" date for the task. After all updated information is included and the window closed, ProjectLibre will  update the project schedule and will make changes visible in the Gantt chart, other charts and the tables.

The "Help" feature is still not functioning; till this document is finished.

# Resources View

### Resource

In the menu bar,  "Resources"  holds the resource pool, information on the resources and Resource Breakdown Structure (RBS) . Some of the functions, for instance "Calendar", are the same as the ones in the command ribbon. Therefore, they  will be marked with a link.
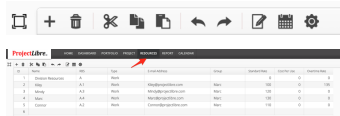


The Resource pool contains the resources for your project.  You can add a new Resource with the + and you can edit the resources.

**\*\*\*\* See about creating a Team when creating a project \*\*\*\*\***
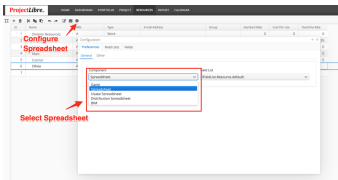
The other functions are replicated from the other features.
The unique actions in the Resource menu are:
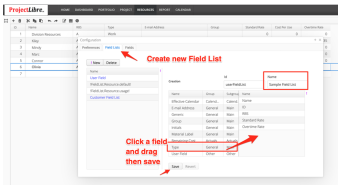
Add a resource

When Adding a resource you can enter the information directly on the spreadsheet. The columns displayed in the spreadsheet are determined by the Field List created in Configuration. It is the same as covered in the Project section.





As noted in the Project section you can create a new Field List in the same dialog box with the Field List tab. If you want to change from the default Field List spreadsheet you can select another such as the Sample Field List shown in the image below.



As noted in the Project section you can create a new Field List in the same dialog box with the Field List tab. If you want to change from the default Field List spreadsheet you can select another such as the Sample Field List shown in the image below.
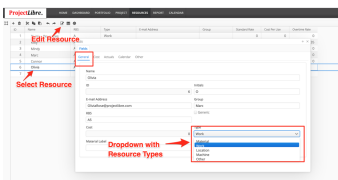


The General dialog box has many of the same fields for entering the resource such as cost, RBS, email address as shown in the image above. The Cost menu is to enter the Standard Rate for the Resource, Cost Per Use (if applicable is the cost incurred each time a resource is used such as machinery) and the Overtime rate.

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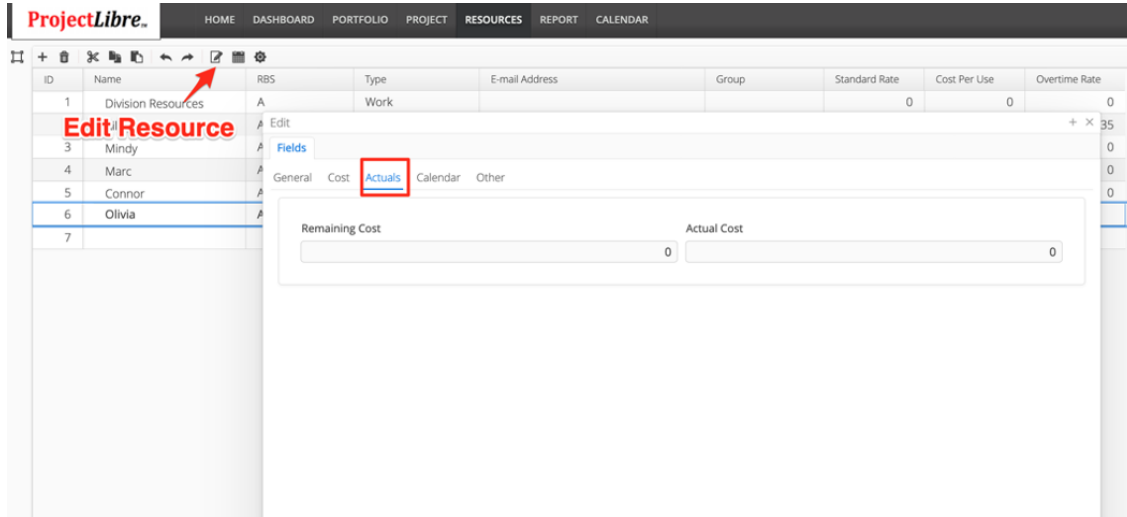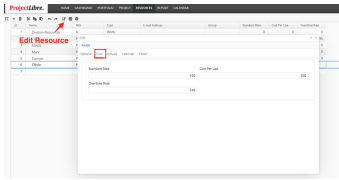




The

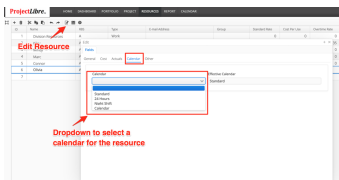Calendar menu is where the resource calendar is selected with the dropdown menu.  The Effective Calendar field shows the current calendar assigned to the resource.  Calendars are created in the Calendar master menu option.



Edit Resource Other menu

ProjectLibre allows users to create Users Defined fields.  The Resources can have these user defined fields displayed.  An example of a useful field would be an Employee Number for a company could be stored with the Resource's information.  We will skip forward to the Configuration option and create a new field then come back to the Edit Resource "Other" tab where we will show the new field in the Resource record.

**Resource Field Configuration.**
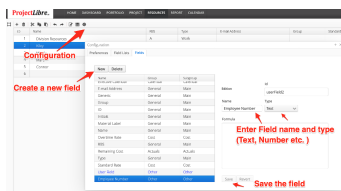


We have created a Text field named Employee ID and now go back to the Resource Other screen and we will see this is not displayed.  You can create unlimited User defined fields.
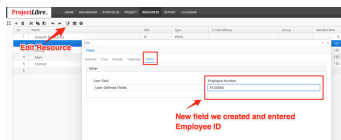


This spreadsheet contains all details on resources, such as Name, RBS, type, e-mail address, initials, Hourly Rate, Overtime Rate, Base Calendar, etc.

The information from this spreadsheet is used by ProjectLibre to make calculations for your project, e.g. duration of work for a person depending on his/her maximal units, or expenditure using the personal rates etc. Filling the spreadsheet is possible by directly typing into the cells and a right mouse click offers a drop down menu with easy features to help.

## RBS ?????

Resource Breakdown Structure (RBS) shows a hierarchic structure in a large list of resources, from personnel, tools, materials, equipment and other services. Cost is not a resource as such, though all resources cost money. A click on the "RBS" button in the "Resources" command bar shows this scheme.        RBS allows you to categorize and summarize resource costs within the project.  It is essentially similar to a Work Breakdown Structure that organizes tasks in a hierarchical structure rolling up data as you go up the tree.  In the RBS it is similar but creates the hierarchy based on the resources.

Each node/block represents a resource and indicates the expenditure of its usage in the project against the budget.  The hierarchical relation between resources is indicated with a line. A click on this relation line brings a new window that allows the line to be removed by clicking on the "Remove" button,
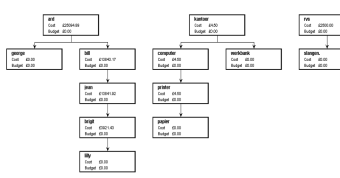
 Resources Breakdown Structure (RBS) for the project

An option that creates a new relation line between resources is also available: click the mouse inside a resource block and a line will appear from the block to the mouse with a ∞ symbol, click on the other block to create the new relation.

It is possible to assign a separate base calendar to each Resource/Person. E.g. a crane may have a 24 hours calendar, while the crane-drivers each have an 8 or 12 hours calendar for their respective shifts.
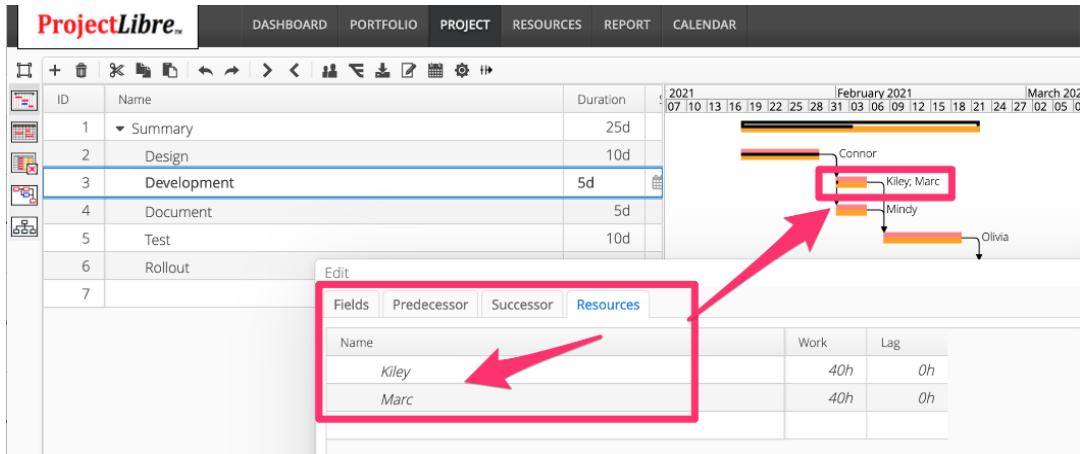A double mouse-click will show the "Resource Information" window; later on this window.

Resource calendars



**Report add content**

Bah, we should think about this as a repository for our reports.  We can start reproducing the desktop reports and I will  send some ideas from the market.

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| **ProjectLibre Cloud Introduction** |
| **Welcome and Cloud Quickstart** |

| **ProjectLibre Desktop Videos** |
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| **ProjectLibre Administrative Set Up Videos** |
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| **Creating Roles, Users, and Teams** |
| **Additional Video about Creating Roles, Users and Resources** |

| **ProjectLibre Editing Videos** |
| --- |
| **Edit Resources** |
| **Add and Edit Tasks** |

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|---|---|
| **Calendars for Scheduling** | Roles/privileges creating and discuss each Access/Read option detailed **(update later))** |

| | |
|---|---|
| **ProjectLibre Cloud Videos** | **Other Videos That Don't Have a Link** |
| **Enter Project** | Tasks |
| **Enter Tasks and Link** | Calendar |
| **Create and Assign Resources and Baseline** | Insert/Delete |
| **Gantt Chart** | Indent / Outdent |
| **Network Diagram** | Split Task |
| **Work Breakdown Structure** | Task Information dialog box |
| **Project Usage Spreadsheet** | Assign Resources |
| **Project Spreadsheet** | Save baseline |
| **Dashboard Configuration** | Edit Task Detail |
| **Dashboard Tab** | Zoom in / Zoom Out |
| **Portfolio Tab** | |
| **Resources Tab** | Resource Tab & Importing Resources |
| **Calendar Tab** | Role Based access (show images) |
| **Project Tab: Percent Complete, Configuration, and Views** | Create Users and Project Teams |
| | Summary Tasks and WBS  (wait on spreadsheet indent bug and zoom - ) |

| |
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| **ProjectLibre Advanced Videos** |
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| **EVM with Powerpoint** |
| **Performance Management (Earned Value)** |
| **EVM Product Full** |

Editing Field Lists