Lab Guide

PPM 202:

Working with Projects in Istanbul

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Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

Lab Sponsored by Microsoft Azure



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Lab Goal

Lab 1.1 Working with Project

This lab explains how to create a Project with its associated tasks, and how to use templates to build your plan.

- Create a project.
- Create Project tasks.
- Show visual task board.
- Create a Project Template.

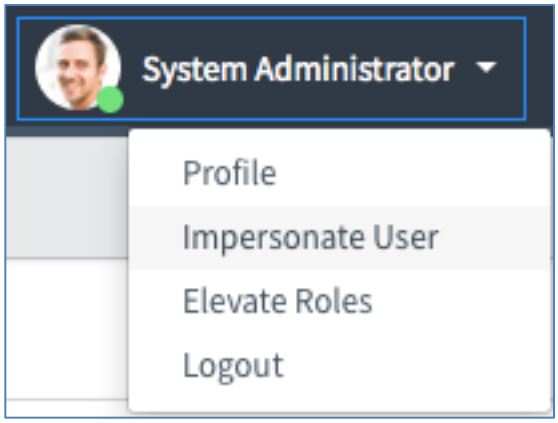
Login Information

1. Navigate to the instance **URL** provided to you.

2. Log on as user **Admin** and use the password **Knowledge17**.

3. As you are going to work with a project manager view, you need to review that george.tukis has the necessary permissions.Go to **User Administration > Users**, type George Tukis and press **Enter**. Select george.tukis, scroll down to the **Roles** tab, click **Edit.** George should have **it_project_manager** and **it_program_manager** roles.

4. In the upper-right part of the screen, select the menu next to System Administratior. Click in **Impersonate User** and search for **george.tukis** (Program Mgr).

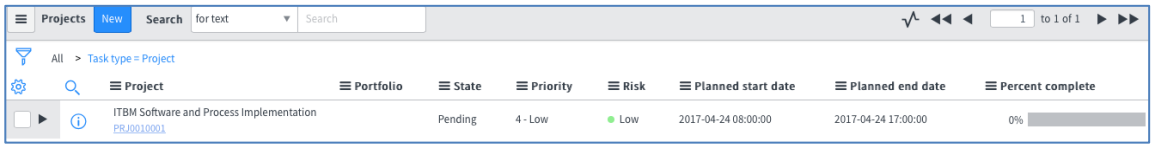


Create a Project

1. Navigate to **Project** > **Projects** > **Create New**.
2. Fill out the project form per the table below.

Field	Description	Enter This Value
Project Name	The name of the project	**ITBM Software and Process Implementation**
Project Manager	The project manager assigned to the project.	**George Tukis**
State	The current state of the project. Following are the default states: **Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, Closed Skipped**.	**Pending**
Description	A detailed description of the project.	**ITBM Software and Process Implementation to better business strategy and investments.**

3. Click **Submit**. Note the Project in the Project list.



Create Project Tasks

Create tasks specific to the project. These tasks are essential for completion of the project.

1. Navigate to **Project** > **Projects** > **All**. You are already there from end of last step.
2. Select your project from the list.
3. Scroll to the Project Tasks related list, click **New**.

4. Fill out the form fields per table below.

Project Task #1

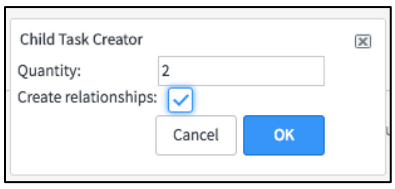
Field	Description	Value
Short description	A brief description of the project task.	**Create Project Charter**
Number	A system generated number with a configurable prefix.	**<Leave as is>**
Time constraint	The field that indicates when a project is scheduled to start	**Start on specific date**
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Pending**
Planned start date	The estimated date and time for the project task to start.	**2017-06-02**
Planned end date	The estimated date and time for the project task to end.	**<Leave as is>**

5. Click **Submit**.

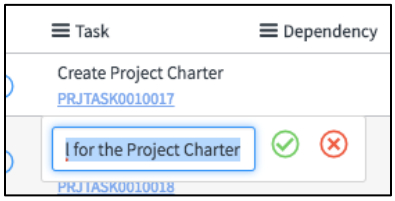
6. You need to create another Project Task. There are several ways to do it. Create a task using the **Project Task Creator**.

7. In the upper-left of the screen, click the **drop-down menu** icon (or Hamburger) and select **Project Task Creator**.

8. A dialog box appears. Create 2 tasks with relationships.



9. Modify the task to have values specified in the tables below. You can modify a task by double-clicking **Task**. Type the name of the task and select the **green** check mark.



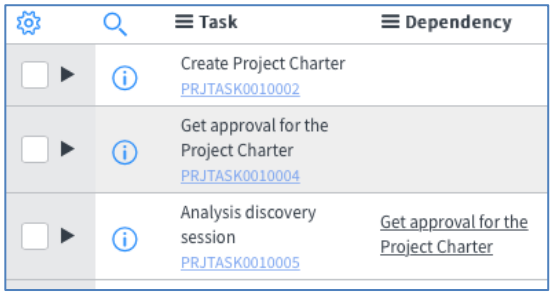
Project Task #2

Field	Description	Value
Short description	A brief description of the project task.	**Get approval for the Project Charter**
Time constraint	The field that indicates when a project is scheduled to start	**Start on specific date**
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Pending**
Planned start date	The estimated date and time for the project task to start.	**2017-06-09**
Planned end date	The estimated date and time for the project task to end.	**<Leave as is>**
Planned duration	The estimated length of time (from start time to end time) of the program task.	**4 days**

Project Task #3

Field	Description	Value
Short description	A brief description of the project task.	**Analysis discovery session**
Time constraint	The field that indicates when a project is scheduled to start	**Start on specific date**
State	The current state of the program. The states include Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, Closed Skipped.	**Pending**
Planned start date	The estimated date and time for the project task to start.	**2017-06-19**
Planned end date	The estimated date and time for the project task to end.	**<Leave as is>**
Planned duration	The estimated length of time (from start time to end time) of the program task.	**1 days**

10. In the upper-left of the screen, click the **drop-down menu** icon (or Hamburger) and select **Reload form.** You should see your project Tasks.

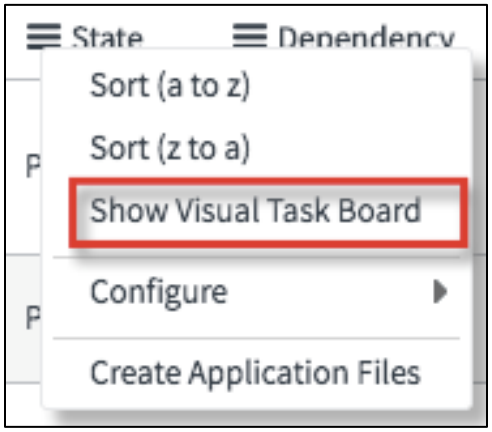


Show Visual Task Board

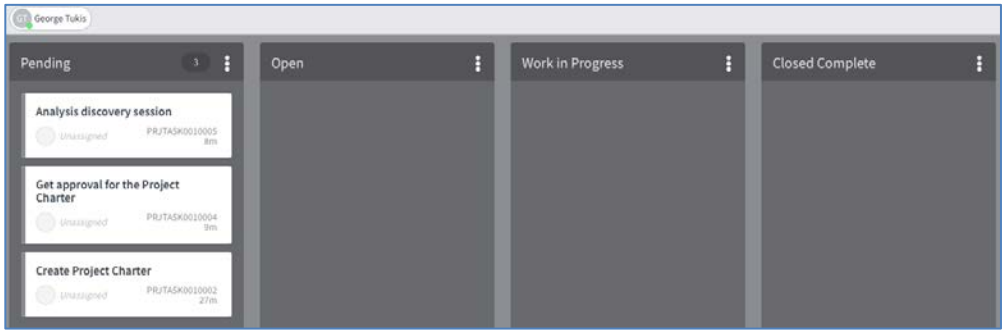
You can visualize your task using the feature Visual Task Board that transform the navigation of lists and forms in to an interactive graphical experience.

1. Go to a project and scroll to the **Project Tasks** related list. You are already there from the end of the last step.

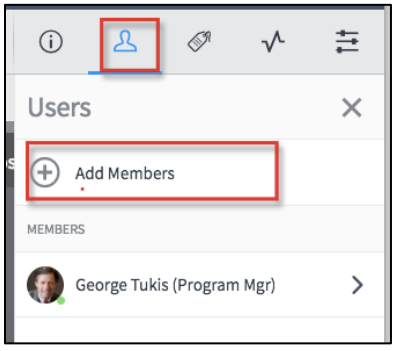
2. In the **State** column, select the **drop-down menu** icon (or Hamburger) and select **Show Visual Task Board**.



3. You should see the **Project Task Board**. Notice that the Tasks are organized by **State** because you selected that field.

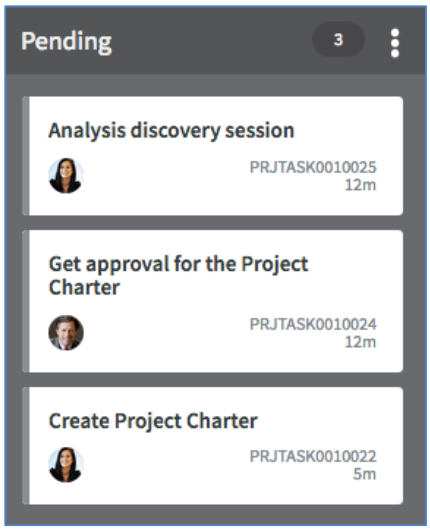


4. Add a User. Click **Users** in the upper-right part of the Board to Add a Member and then click the **Add Members** option.

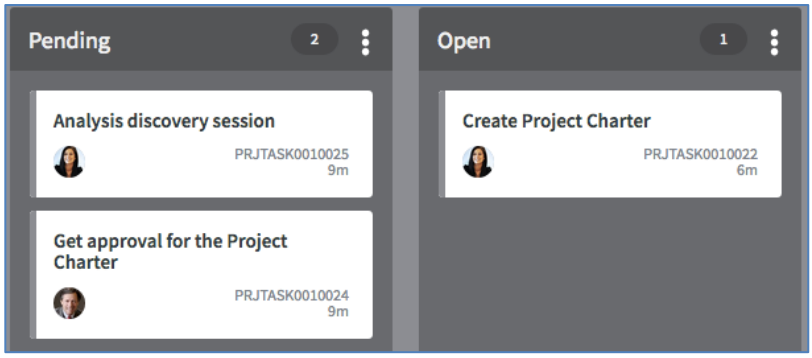


5. In the search field type **Elaine Renzi** and select the name. Close the **Users** section.

6. You should see Elaine and George in the upper side of the Board
7. Select Elaine and drop down her name to the first task as **Primary**. Repeat the step assigning Elaine to the **third** task.
8. Select George and drop down his name to the second task as **Primary**.
9. You should see the task assigned.

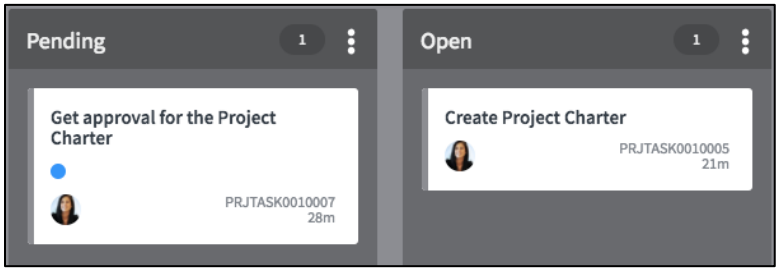


10. Select the **Create Project Charter** Task and move the task from Pending to **Open**. You should see 2 tasks in **Pending** state and 1 task in **Open** state.

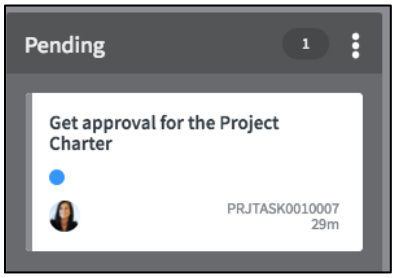


11. Add a label. Click **Label** in the upper-right part of the board to enable the **Show Labels** option.
12. Select the **High Priority** label and drop it down to the task **Get Approval for the Project Charter**.

13. Filter the tasks assigned to Elaine by clicking her name at the top of the board. You should see the following image:



14. Filter the tasks with the **High Priority** label by clicking the label at the top of the board. You should see the following image.



15. Turn off the filters by clicking the **X** next to the **Filtering is On** option.



16. You should see your original Board.

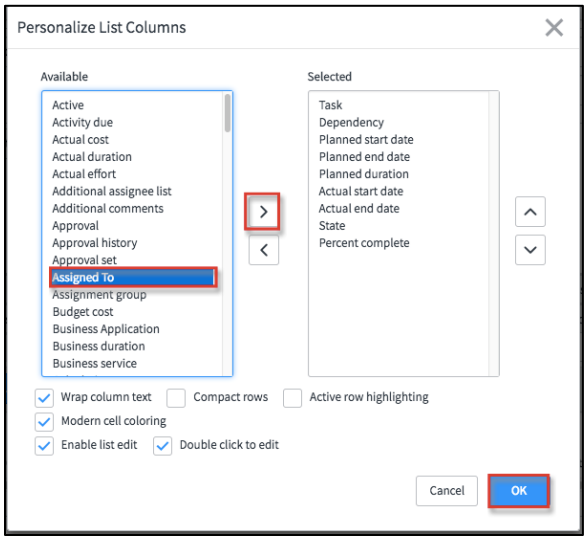
17. Return to your project. Navigate to **Project** > **Projects** > **All**.

18. Scroll to the **Project Tasks** related list.

19. Select the **gear** in the left part of the **Project** tasks.



20. You should see a dialog box. Add the field **Assigned To** and click **OK**.



21. Generate a Visual Task board using the **Assign To** column.

22. You should see the Visual Task Board organized by the assignee.

Create a Project Template

Create a project template available for future projects.

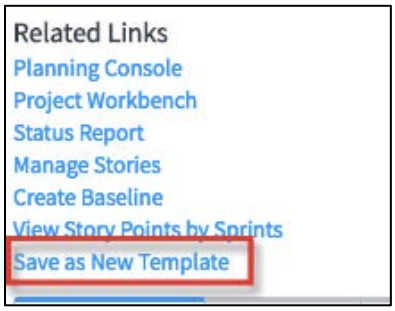
1. Navigate to **Project** > **Projects** > **All**.

2. Select your project from the list.

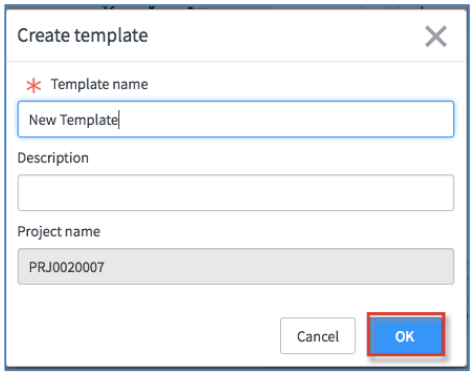
3. Attach any file to the Project by double clicking the **Manage Attachments** Button at the top of your screen.



4. Select the Related Link **Save as New Template**.



5. Provide the name **K17 Project Template** for the new template and click **OK.**

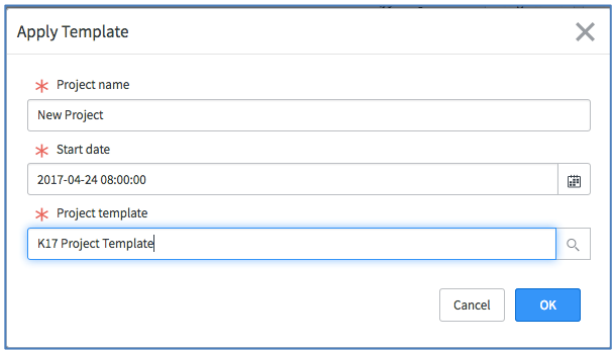


6. Navigate to Project > Projects > Create New

7. Select the **Here** link at the top of your screen.



8. A dialog box opens. Complete the values and select the **K17 Project Template** that you created in your the lab. Click **OK**.



9. Can you see the tasks and the attachment? This save a lot of time.

10. Generate a new project using another Template.

Lab Goal

This lab explains how use the Planning Console. It explores the following:

- Navigate in the Planning Console
- Baseline
- Milestones
- Planning Console generate new projects

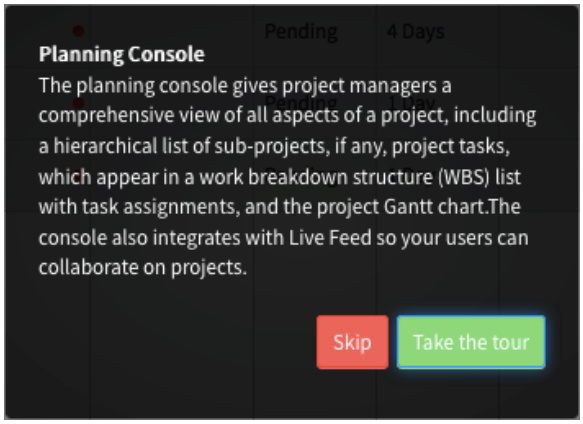
Lab 2.1 Work with Planning Console

The planning console is a centralized interface for the Project Management Application. The planning console gives project managers a comprehensive view of all aspects of a project, including a hierarchical list of subprojects (if any), projects tasks (which appear in a work breakdown structure (WBS) list), and the project Gantt chart. The console also integrates with Live Feed so your users can collaborate on projects.

Navigate in the Planning Console

Visualize your project using Planning Console and learn how to use basic elements in the console.

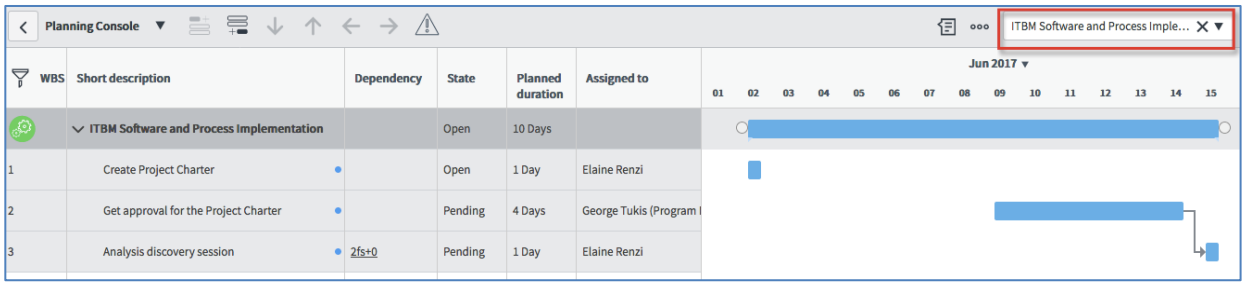
1. Navigate to **Project** > **Projects** > **Planning Console**.
2. Select the button **Take the tour**.



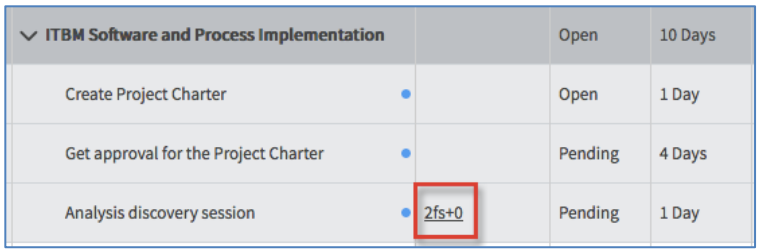
3. Select the button **Got it** in each section.



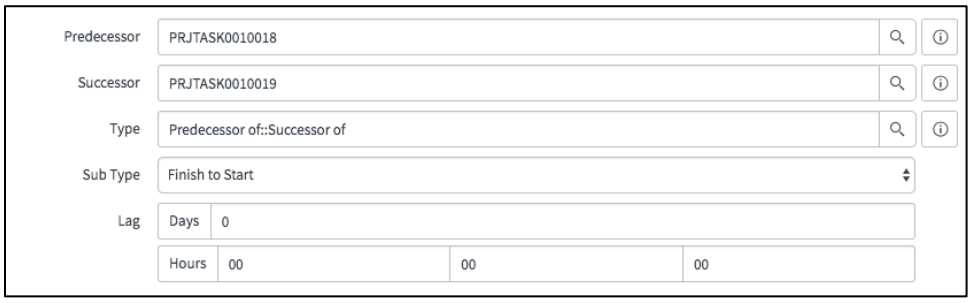
4. Look for your previous project in the upper-right section.



5. Now inspect the dependency between Tasks. Double-click the dependency on the Gantt Chart of the Planning Console.

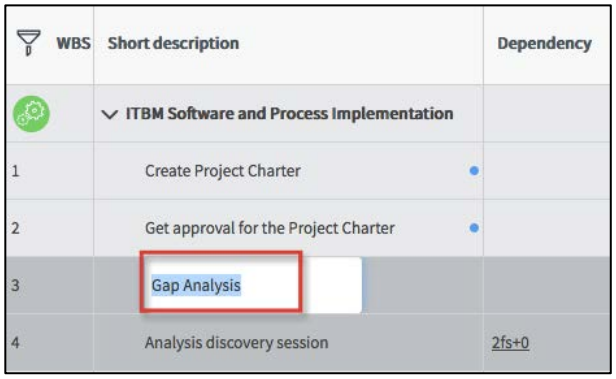


6. You should see the following information.

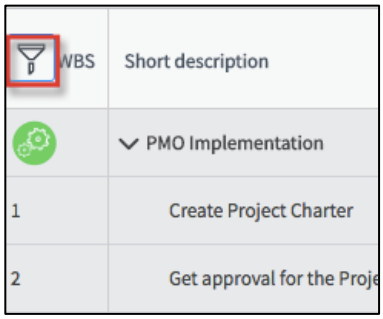


7. Notice the information. The Sub Type **Finish to Start** indicates that a task must not be started until its predecessor finishes. The **Lag** field is the time break between predecessor and successor tasks.

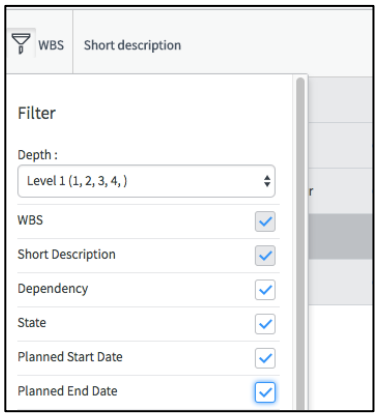
8. Select the last task and add another task by selecting **Add Task Above**. Type the name of the task **Gap Analysis** and press **Enter**.



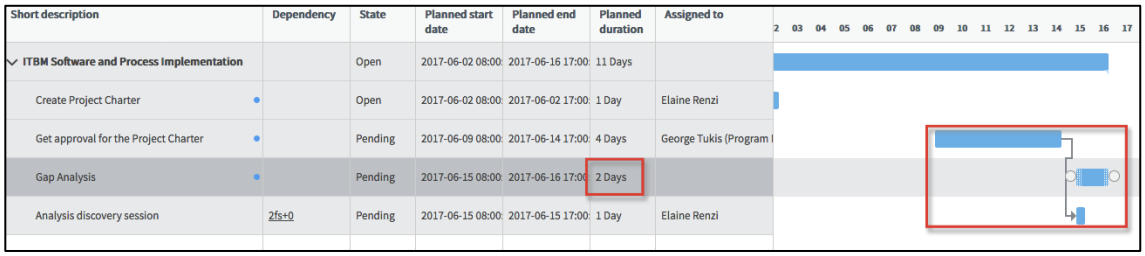
9. You can add columns in your plan. Select the **Filter** button in the left side of the Console.



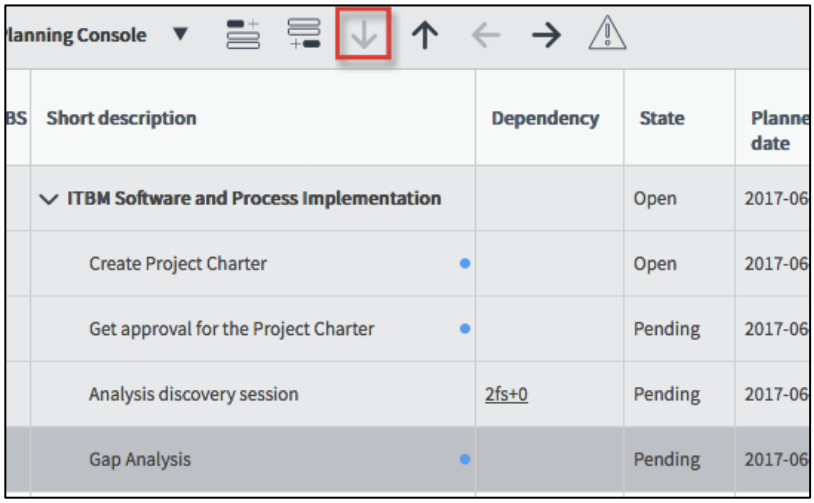
10. Select **Planned start date** and **Planned end date**.



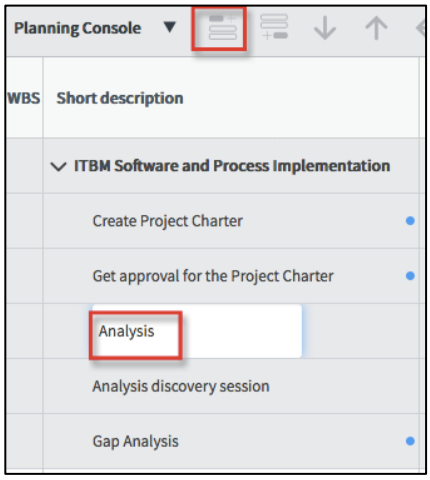
11. Select the Task “Gap Analysis” Modify the **Planned start date** to June 15, 2017, and press **Enter**. Modify the **Planned end date** to June 16, 2017, and press **Enter**. You should see how the Planned duration changes according to the dates.



12. Change the order of Tasks **3** and **4**. Select the task **3** and select the **Move down** button. You should see how the task change the order.



13. Select the Task “Analysis discovery session” and select the **Add Task Above** Button.

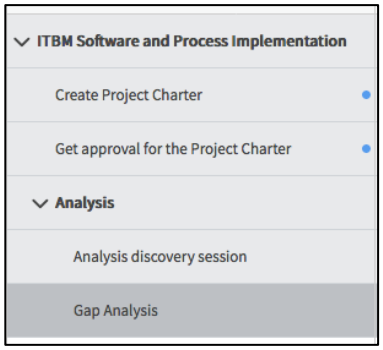


14. Select the “Analysis Discovery Session” Task and Click the **Indent** Button.



15. Select the “Gap Analysis” Task and Click the **Indent** Button.

16. You should see this image.



17. Select the “Create Project Charter” Task and Click the **Add Task Above** Button, type “Initiating”.

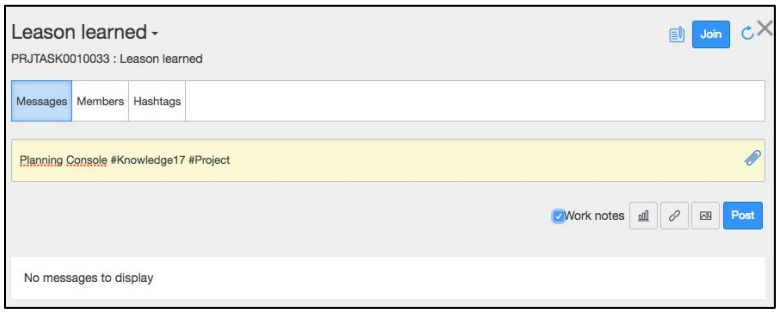
18. Select the “Create Project Charter” Task and Click the **Indent** Button.

19. Select the “Get approval for the Project Charter” Task and Click the **Indent** Button.

20. Your project shoul look like this screen, if something is missing make the adjustments.



21. Post in **Live Feed**. Select the button **Show Live Feed**, type the comment “Working with project #Knowledge17” and select **Post**. Post another comment with #Knowledge 17. Notice how all the comments are saved.

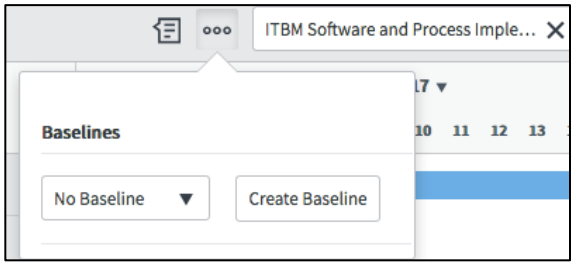


Baseline

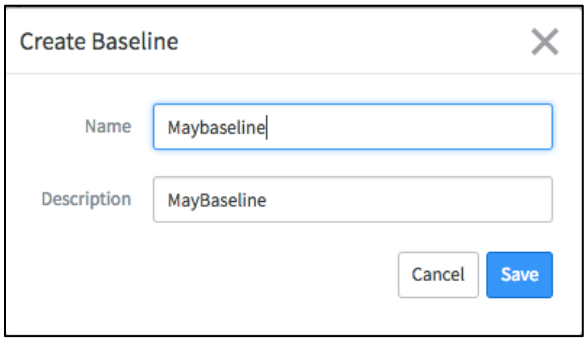
A baseline is a collection of all planned dates for all tasks and milestones at the time you create the baseline. The baseline appears as a set of gray lines offset to the left or right of the bars that represent the actual tasks on the Gant Chart. These baselines represent planned dates while the task bars represent the actual dates.

1. Navigate to **Project** > **Projects** > **Planning Console** and select your previous project. You are already there from end of last step.

2. Click the Gantt chart icon **Options**(…). Click button **Create Baseline**.

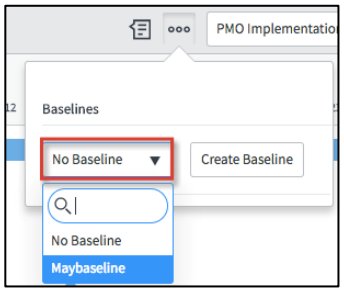


3. A dialog box appears. Enter the name and description **MayBaseline**. Click **Save**.



4. Select the last task in the project **Gap Analysis** and change the **Planned duration** by double-clicking the value **2 day** to **10 days**. Press **Enter**.

5. Click the Gantt chart icon **Options**(…).Click the Baseline **MayBaseline**.



Lab Success Verification

1. You should see the difference between the baseline and the current dates.



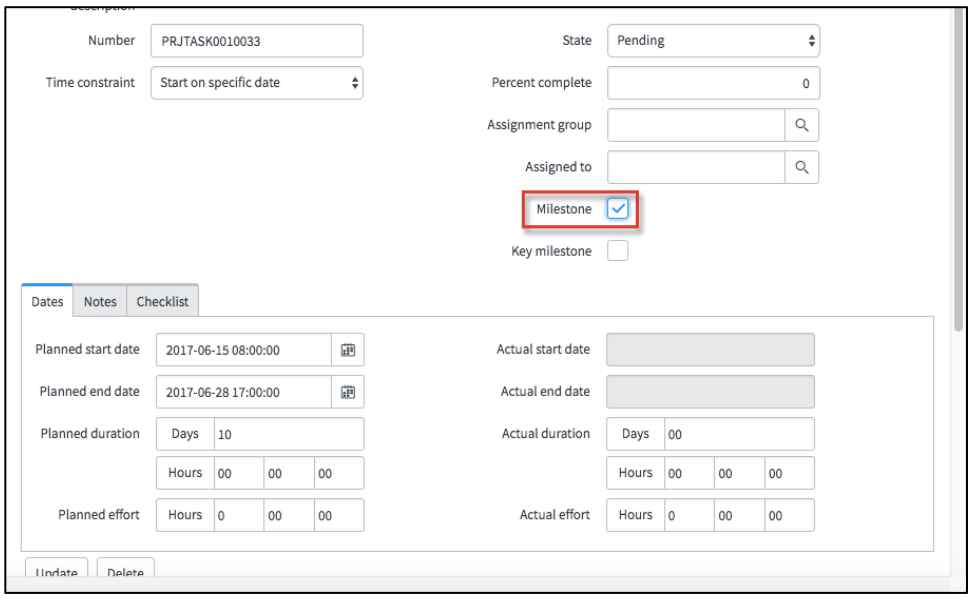
Milestones

A milestone is a project Task with Duration of Zero (**0**). You can use milestones to mark key dates in your project.

1. Navigate to **Project** > **Projects** > **Planning Console** and select your previous project. You are already there from end of last step.

2. Select the last task by Clicking the **Short Description** "Gap Analysis".

3. A dialog box appears in the left side of the screen. Select the option **Milestone**. Click **Update**.



Lab Success Verification

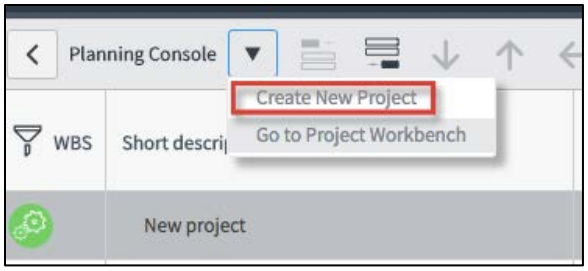
1. You should verify that the Gantt Chart show a Diamond instead of a line.



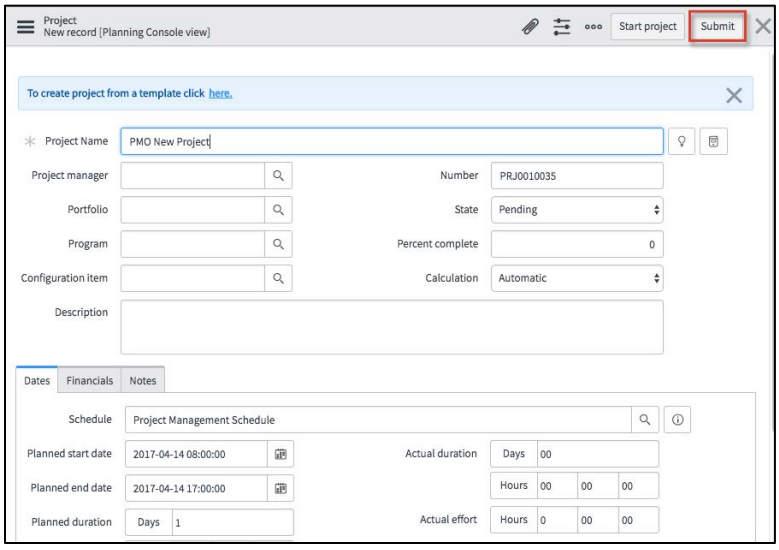
Planning Console Generate a Project

You can use the Planning Console to Generate new projects.

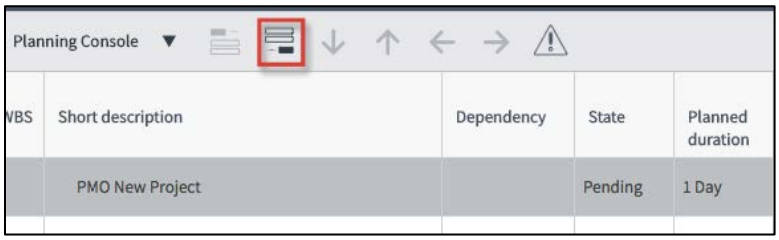
1. Navigate to **Project** > **Projects** > **Planning Console**.
2. Select **Create New Project**.



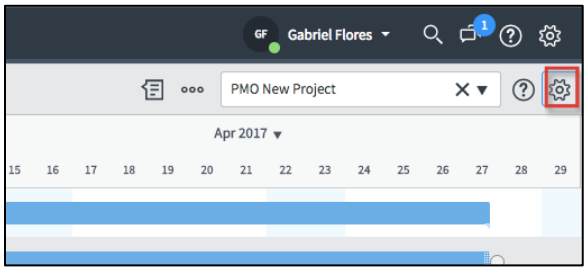
3. You can see a dialog box in the right part of the screen. Type the project **Name** and click **Submit**.



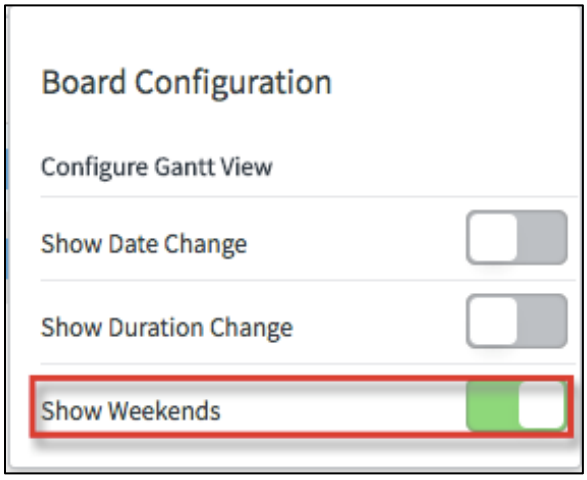
4. Select **Add Task Below** and create a New Task with **10** days' duration.



5. Go to **Board Configuration Settings** in right part of the screen.

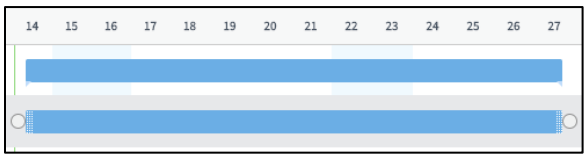


6. Activate the option **Show weekends**.



Lab Success Verification

1. You should the weekends in your Gantt Chart.



Lab Goal

Lab 3.1 Work with Project Workbench

This lab explains how to effective use the Project Workbench to perform the following tasks:

- Navigate in the Project Workbench.
- Create a new Project
- Modifying Tasks

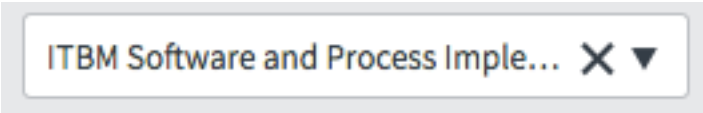
The Project Workbench provides a central location for creating and managing projects that contains sprints and/or test phases. The workbench supports the project management and application life cycle management application life cycle management applications, allowing for a hybrid approach to project management. Project Managers can create projects that combine both Waterfall and Agile methodologies and add Waterfall, Agile, and Test phases to these projects.

Navigate in the Project Workbench

Visualize your project using Project Workbench.

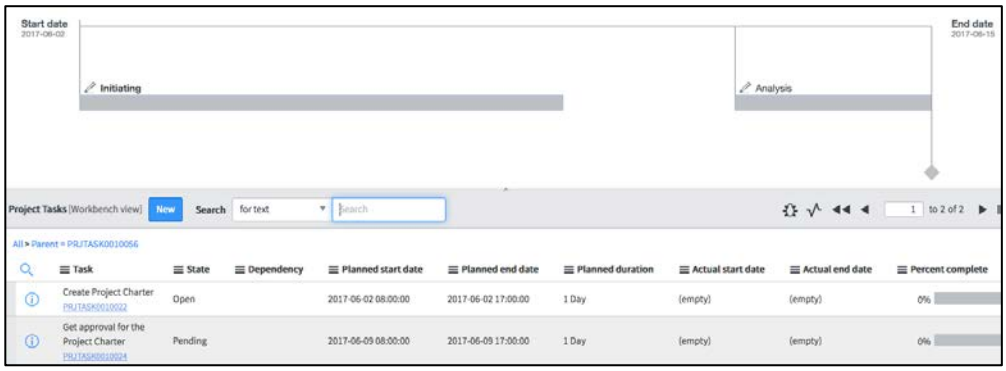
1. Navigate to **Project** > **Projects** > **Project Workbench**.

2. Enter **ITBM** to select your previous project “ITBM Software and Process Implementation” in the upper-right section.



Lab Success Verification

1. You should see the next image.

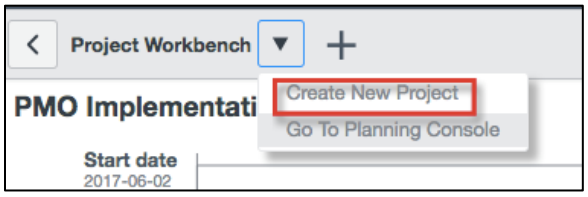


Create a New Project

Generate a new project using Project Workbench.

1. Navigate to **Project** > **Projects** > **Project Workbench**

2. Select **Create New Project** option from the menu in the right corner of the console.



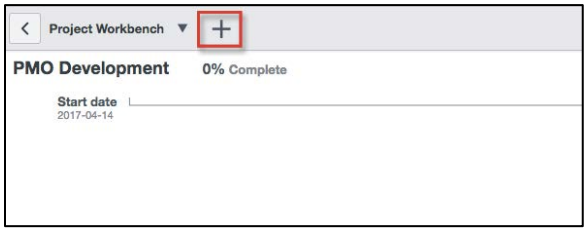
3. Fill out the project form per table below.

Project Form

Field	Description	Enter this Value
Project Name	The name of the project	**APP Development**
Project Manager	The project manager assigned to the project.	**George Tukis**
Portfolio	The portfolio to which the program belongs.	IT Application Modernization
Calculation	Type of calculation applied to the project	Automatic

4. Click **Create Project**. Note the Project in the Project Workbench

5. Add a **Phase** selecting the **Add Phase** button.



6. You can see a dialog box. Fill out the Phase Form per table below.

Phase Form

Field	Description	Enter this Value
Phase	You can select if you are working with Waterfall, Agile, or Test	**Agile**
Title	A detailed description of the project. phase	**Agile Phase**
Start Sprint	Sprint is the smallest unit of time in Scrum Development	**ITBM Sprint 1**
End Sprint	Sprint is the smallest unit of time in Scrum Development	**ITBM Sprint 2**
Planned Start Date	The estimated date and time for the project phase to start.	**<Leave as is>**
Planned End Date	The estimated date and time for the project phase to end.	**<Leave as is>**
Planned Duration	The estimated length of time (from start time to end time) of the program task	**5 days**

7. Click **Submit**.

8. Add a **Phase** by selecting the **Add Phase** button. Fill out the Phase Form per table below.

Field	Description	Enter this Value
Phase	You can select if you are working with Waterfall, Agile, or Test	**Test**
Title	A detailed description of the project. phase	**Test Phase**
Planned Start Date	The estimated date and time for the project phase to start.	**2017-06-05**
Planned End Date	The estimated date and time for the project phase to end.	**<Leave as is>**
Planned Duration	The estimated length of time (from start time to end time) of the program task	**6 days**

9. Click **Submit**.

10. Add a Phase selecting the **Add Phase** button. Fill out the Phase Form per table below.

Field	Description	Enter this Value
Phase	You can select if you are working with Waterfall, Agile or Test	**Waterfall**
Short Description	A detailed description of the project. phase	**Waterfall Phase**
Planned Start Date	The estimated date and time for the project phase to start.	**2017-06-19**
Planned End Date	The estimated date and time for the project phase to end.	**<Leave as is>**
Planned Duration	The estimated length of time (from start time to end time) of the program task	**5 days**

11. Click **Submit**.

12. Add a **Milestone** by selecting the **Add Phase** button and select the **Milestone** tab. Fill out the Milestone Form per table below.

Field	Description	Enter this Value
Short Description	A detailed description of the project Milestone	**Control**
Status		**Green**
Planned Start Date	The estimated date and time for the project phase to start.	**2017-07-03**
Milestone	The indicator that this is a task with duration zero	**<Leave as is>**

13. Click **Submit**

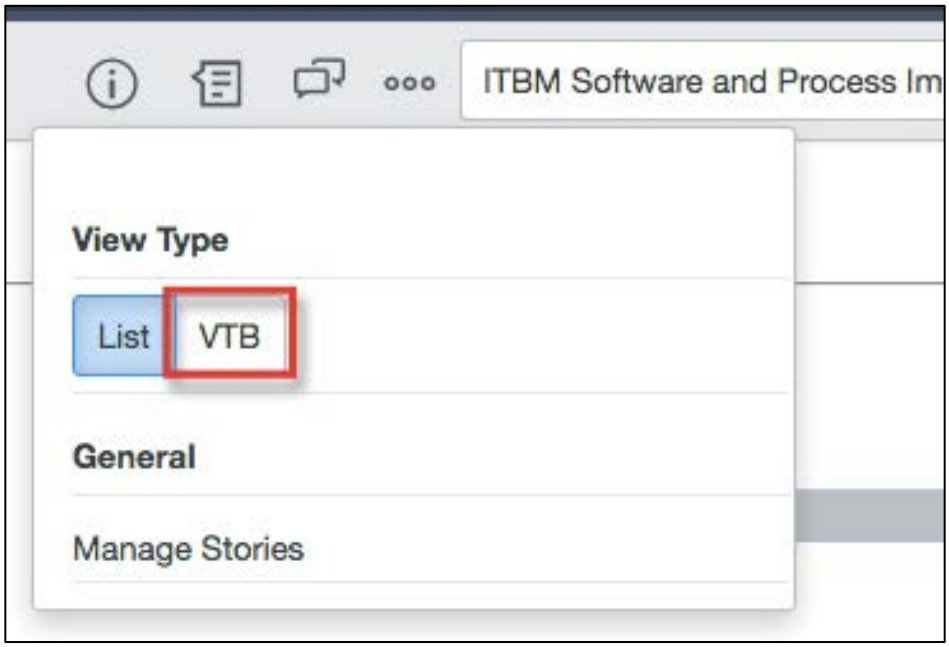
Lab Success Verification

1. You should see the difference between the phases in the Project Workbench.

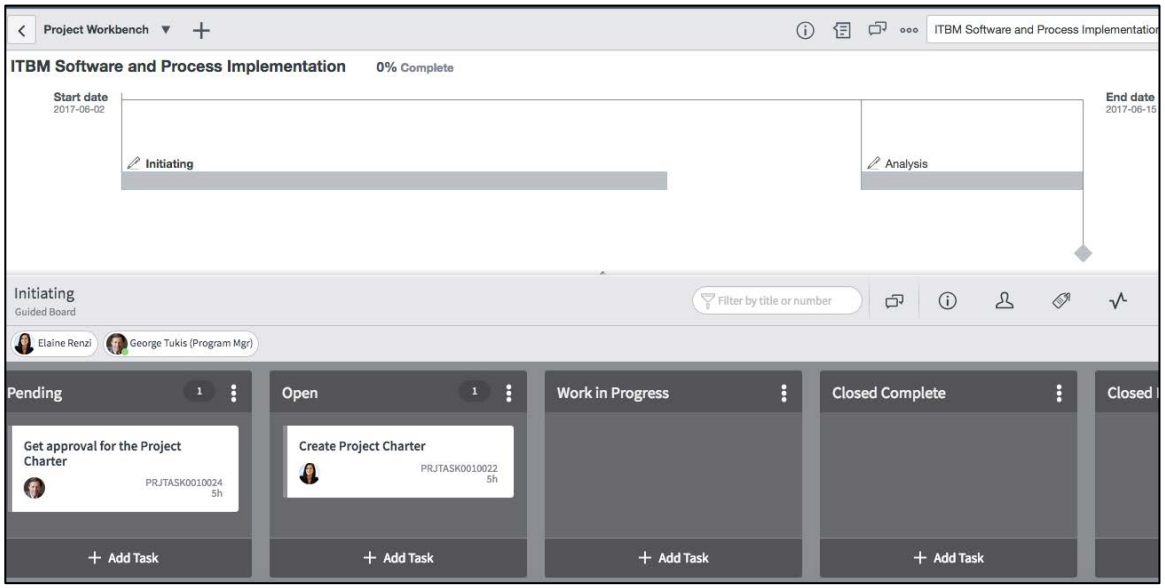
Modifying Tasks

1. Navigate to **Project** > **Projects** > **Project Workbench** and select the project " ITBM Software and Process Implementation.

2. Select the **Options** menu (…).Click **VTB**.



3. You should see your project by graphical States.



4. Modify the task in the Iniating phase to Work in progress.

Lab Goal

Lab 4.1
Work with Record Lists

This lab explains how work with record lists. It explores the following areas:

- Filters
- Modifying a project
- Configuring lists

The record list provides a wide range of controls for sorting, filtering, moving, and editing data. List controls enable a user to manipulate and view data and records from within a list without having to open individual records. Information about lists include the administrative functions for controlling the presentation, management of lists and the list controls available to end users for searching and managing the data they are permitted to view.

Filters

You can filter any record in the platform.

1. Navigate to **Project** > **Projects** > **All**.
2. Mark this section as **Favorite**.

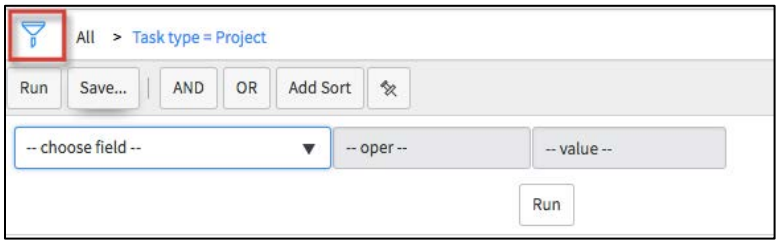


3. Select the **Favorites** section and select **Project All**.
4. Minimize the Navigator by clicking the arrow in the left-bottom side of your screen.

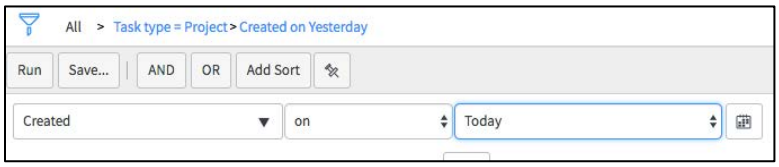


5. Look for your previous project. Select the **Show/Hide** filter option.

6. You should see the following screen.

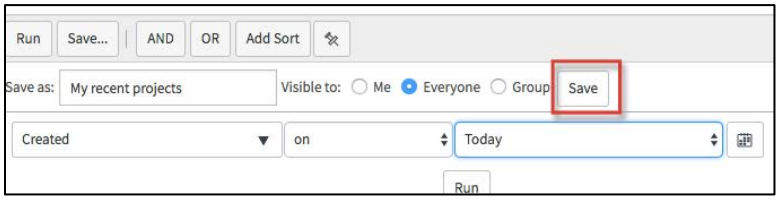


7. In the **choose field** option, type **Created**;, in the **oper** option, select the **on** value; and in the **value** option, select **Today**.



8. Click **Save**.

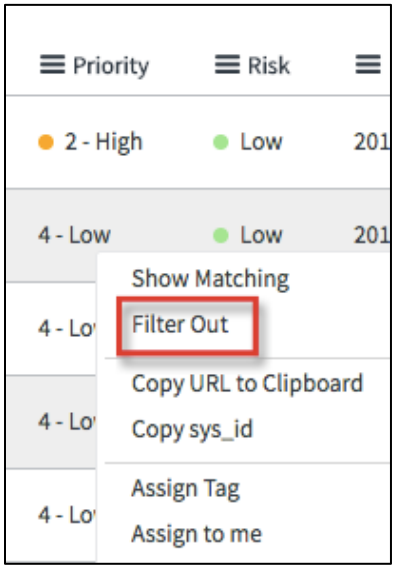
9. Name your search **My recent projects** and make it visible for **Everyone**. Click **Save**.



10. Undo the filter by selecting the **X** mark in the right side of the filter. Click **Run**.



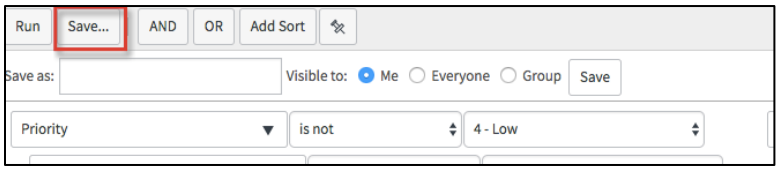
11. Now you have all the projects in your record list. Generate other filter without **4 – Low** Priority. Right-click in any record with **4-Low** value in the column **Priority** and select **Filter Out**.



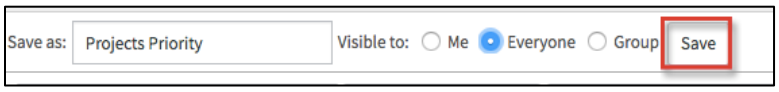
12. Select the **Show/hide** filter.



13. Click **Save**.

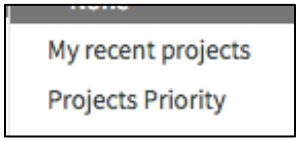


14. Name the search that you are working on like **Projects Priority** and make it visible for **Everyone**. Click **Save**.



Lab Success Verification

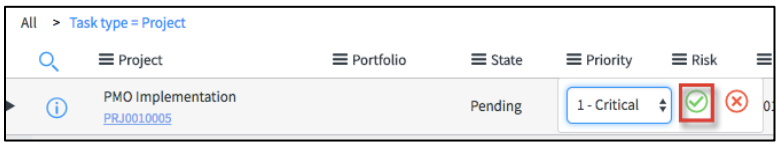
1. Navigate to **List Controls > Filters**. You should see your previous filters.



Modify the Project

Add a new field in the record list.

1. Navigate to **Favorites > Project – All**.
2. Select one of your projects.
3. Modify the **Priority** value without open the individual record by double-clicking the field **Priority**, modify the value to 1-Critical and click the green check to **save**.



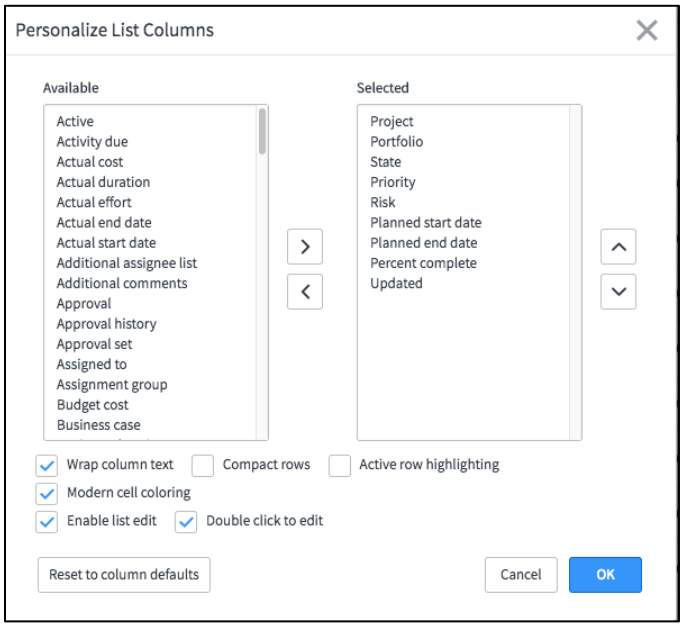
Configure List

Add a new field in the record list.

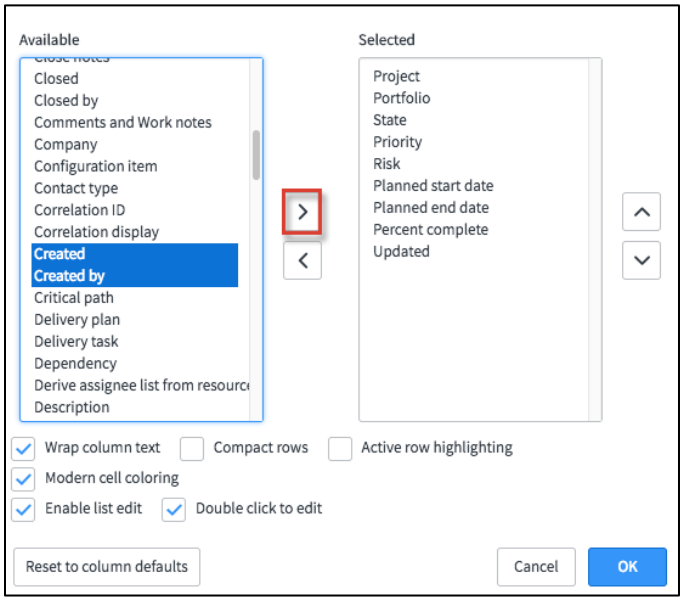
1. Navigate to **Favorites > Project – All**.
2. Click the **gear** to **Personalize List Columns**.



3. You should see the following dialog box.



2. Add the fields **Created** and **Created by** and click **OK**.



Lab Success Verification

1. Make a filter with all the projects Created by george.tukis