Software that brings together the ideas and techniques of TameFlow Kanban and TameFlow Scrum, Agile/Scrum, Critical Chain Project management, TOC and LEAN in one integrated solution

# GET STARTED WITH LYNX

**Project Managers** 





## Contents

#### DOWNLOAD LYNX

https://www.a-dato.com/download-lynx/

#### Configuration

<u>Registration and Login</u> (5)
LYNX Overview (10)

#### Planning

- Create your first project (21)
  - Add Tasks (26)

- Add Dependencies (31)
- Add Skills and Resources (39)
- Add Task Managers (45)
- Apply CCPM Behavior (48)

#### Execution

 <u>Release your project and tasks for</u> <u>execution</u> (56)

- Other:
  - A few tips and tricks
  - More information



Visit the

LYNX HELP CENTER

https://support.a-dato.com/hc/en-us

# Visit the LYNX Help Center

File	Edit	Tabs	Configure	Help						
My a	ctivities	Messages	(0) Project por	t Abou	t		ts Reporting			
	Show des	ign packages		Help	center	►	Get started			Cards >>
			ID Description	Relea Get a Langu	se notes demo space Jage	Þ	General help rt date TM Priority	RTS	Resources	



# Search and Replace (CTRL F)

My a	ctivitie	es Me	essages (0)	Project portfolio	Active tasks	Assig	Inments	Reporting	< D	01 Pr	roduct deve	lopment project					
				P.	R		<u> a</u>	-					<b>77</b>				
Sa	ve all	[1]	Open	Add	Delete		Properties	Progres	s cha	art	Notes	Resource load	TameFlow	Debuffered	Scenario		
Sea	rch St	atus:	Released							ŀ	Advanced s	search				×	×
٢	Φт	empla	tes 🍹 Sł	now all 🛛 🍟 Not s	started 鎽 Re	elease	ed 🎫	ïmeline 🔚			<u> </u> Find	🔁 Replace					
	ID	Ref.	Description	1	-	PM	Status	Sta	rt		Find wh	at:		Look for:			
8	D01		D1 Produc	t development	project	MD	Released	Thu 8 O	ct T	Tue				🗙 <all mat<="" td=""><td>ches&gt;</td><td>~</td><td></td></all>	ches>	~	
			resource hou	rs: 160h remaining:	160h - 100%						_						
											Cas	e sensitive					
											Wh	ole words only					
											Use	regular expressions					
													F	Find previous	Find next		
														Activata filtar	Find all		
													F	Activate miter			



#### Register as a new user OR

Login by invitation with your (new) credentials received per email

support@a-dato.com	Welcome to Lynx Copyright © 2009-2020 A-dato B.V., all Rights Reserved. version 25.24.7577.12712 [x64] Connecting to: https://service.a-dato.net		If you already received an <b>invitation</b> to join LYNX from another user (e.g. colleague, admin, workspace owner) your login credentials are provided in the invitation email.
www.a-dato.com	Login Please enter your login information	×	From: Mike Dempsey < <u>support@a-dato.com</u> > Date: 2015-05-04 14:04 GMT+02:00 Subject: You have been invited to join our platform To: <u>your.email@yourcompany.com</u> Cc: Mike Dempsey < <u>mike.dempsey@kaikes.com</u> >
2020	Save login information   EMail enter your email address   Password enter your password here   Forgot   Create a new account.		Hello, You have been invited to join the A-Dato Project Management platform named Lynx. This invitation was sent to you by 'Mike Dempsey' You have been invited to join the project space 'My Workspace' Select the following link to start the Lynx client application:
	If you are <b>invited as a first-time user,</b> LYNX will provide an initial password, which can be changed in MyProfile		https://service.a-dato.net/Lynx/Lynx.application         If this link is not working then you can visit our website at <a href="https://www.a-dato.com">https://www.a-dato.com</a> and press the 'Try now' button         You may login to our platform using these credentials:         Username: your.email@yourcompany.com         Password: 73b6a08e         Thanks for your continued support for our platform.

Kind regards,

The A-Dato support team

🔘 a-dato

# New User Registration



#### Login after registration with your email and your password

7





#### My activities Your First Screen showing your activities / Select " Configure"

File Edit Tabs Configure Help Select	Configure as the		If you are a <b>new registered</b> user, this screen is (still) empty	
Show design packages	next step.	text 🛛 😂 🧮 🖉 Cards >>	Task details	\$ 7
ID       Description       c/m       Start         If       you are invited as a (not the role of Task Manager, be displayed here.       If you are invited as a (not the role of Task Manager, be displayed here.	date TM Priority RTS (new) user, for example in 7, your tasks may already ed the name of an existing We . For example "MyCompany"	Resources	ID Description Project Project manager Scheduled dates Milestone constraint Last update Task manager Resourcing Notes Documents Custom fields Working hou	urs V 1
1. A-dato - Engineering Portfolio Default				

# Check or Update My Profile

File Edit Tabs Confi	figure Help	
Login as a different user	portfolio Active tasks Assignments Reporting	
My profile		😂 🗮 윋 Cards >>
<ul><li>TameFlow</li><li>Debuffered</li></ul>	escription c/m Start date TM Priority RTS Resource	25
Setup Import project from csv		
Exit	Welcome to Lynx	
	Introduction	You can change your
Go to File $\rightarrow$ My profile		
	First name Mike Company name a-dato	
	Last name Dempsey Email address mike.d	empsey@a-dato.net
	Initials MD Cha	nge password Secure login
	Please keep me informed about new developments with Lynx A-Dato occasionally sends out a newsletter with the latest update newsletter is a great way to stay informed. We will never share an with 3rd parties.	es about our products. This ny of your personal information





### LYNX Workflow Optimization – The Project "Factory"



#### Layer 3 Integration LYNX TameFlow Task Board, including Flow Buffer Management



# Focus of this manual: Layer 2





**Create Projects** CCPM Buffer Management "Operational Priorities"



#### <u>Pooling</u> of Contingency – Insurance Model Buffer Management

#### "To be safer, (re)move the safety"







#### Green

15

#### 50 % progress on the longest chain / 15 % buffer used





#### Red

#### 55 % progress on the longest chain / 65 % buffer used



### What can you do with Red, Orange and Green?

Resolve day-to-day resource conflicts (and prevents (bad) multi-tasking)



17

## What is needed? Fast-Feedback Loop (ETTC)



Continuous (frequent) update of the "Expected Time to Complete" for each active task (ETTC)

#### **Flawless handovers:**

- Ensure Delivery is complete
- Be Ready-to-Start
  - Good preparation





A START

#### "To do" List Sequence from red to green

19

🐼 N	Aike Dempse	еу									
File	Edit	Tabs	Configure	Help							
My	activities M	lessages (0)	Project portfolio	Active	e tasks	Assignments Report	ing 🛛 N	IP01 N	lew produc	t developn	nent
¢	Show desig	n packages									😂 🧮 💋 Cards >>
	ID	Descriptio	on		c/m	Start date		ТМ	Priority	RTS	Resources
	T-1-T	C2 Determin Solution En size in hour	ne Solution D g. with subtask ca	<b>irect</b> rds -	<u> </u>	Wed 7 Aug 2019 22:.	25 [w32]	MD	9	Started	Engineering Team [10 days, started]
	NP01-T	T3 Software NP01 New project (80	e <b>developmen</b> product developm days)	<b>t</b> ent	<u> </u>	Thu 29 Oct 11:53	[w44]	MD	0	Started	Jane Sanders [16 days, started] Designer [15 days, not started]
	NP01-T	F2HardwarNP01 New project (80	re developmer product developm days)	I <b>t</b> ent		Wed 4 Nov 9:00	[w45]	MD	$\bigcirc$	Yes	Hardware Engineer [8 days, not started]



# What can you do with **Red**, **Orange** and **Green**? *Manage all projects together*





# 21 Create your First Project

#### Select Project Portfolio in Add your first project the Desktop Window (F5) Select Add File Edit Tabs Configure Help Project portfolio Active tasks Reporting My activities Messages (0) Assignments $\frac{\Gamma}{\Gamma}$ **77** \_ 2.0 **P** TameFlow Add Properties Progress chart Debuffered Save all Open Delete Notes Resource load Scenario ... Search Status: Released Show all Templates Release Not started Timeline 3 Project properties 🚳 Project proderties Project properties ? × ? X Scheduling Resource availability Critical chain General Custom fields Project dates Scheduling Resource availability Critical chain General Custom fields Project dates Scheduling Resource availability Critical chain General Custom fields Templat Control the start and stop dates of your project How do you want this project to be scheduled? General project properties Project start date Project ID 001 Schedule engine Valid ID The start date marks the earliest start of any task in your project Description D1 Product development project O Schedule tasks 'as soon as possible' OUse current date 'as soon as possible' will schedule tasks forward from the project start date Fixed date: • Schedule tasks 'just in time' بر المعامن الم Status Not started Thursday, October 8, 2020 . Add a Project ID and Project Activate CCPM schedule engine Project end date CCPM provides a project management solution based on the Theory Of Constraints Calendar name (description) O Schedule feeding chains 'as soon as possible' The end date marks the latest possible finish of any task 8:00 Hours per day • Schedule feeding chains 'just in time' O Project does not have an end date Mike Dempsey Invite Project manager Reschedule behavior for projects containing progress information Fixed date: Shared with User Read & write • If the status is set to 'Not started', schedule the project using the original plan Tuesday , December 1, 2020 O If the status is set to 'Not started', schedule the project based on the current progress Add Project must be saved before users Multi project behavior can be invited Sun Mon Tue Wed Thu Fri Sat Revoke 29 30 1 2 3 4 5 Tasks should be scheduled in consecutive order 6 7 8 9 10 11 12 Allow tasks to split to optimize resource allocation 13 14 15 16 17 18 Resourceload leveling 20 21 22 23 24 25 26 27 28 29 30 31 1 2 Auto ba 3 4 5 6 7 8 9 Ensure the "Critical Chain Engine" is selected. Today: 10/8/2020 Add an initial desired or Select your preferences. In CCPM Just in Time is requested end-date (due date) considered as "Best Practice." Save project as a template OK Cancel Save project as a template OK Cancel Save project as a template ОК Cancel

#### Your first project is listed in the Project Portfolio / Not started



#### The "Project Window" – Multiple Views and Windows



# **Create the Project Plan**

- Add Tasks
- Create the Project Network
  - Add task dependencies (predecessors / successors)
- Add (Virtual) Skills (and resources)
- Convert the plan into a Critical Chain Plan





# Target Plan

<b>(</b>	/ike [	Dempsey																						_	Ľ	]	×
File	E	dit V	/iew	Project	Tabs	5 (	Configu	re	Help																		
My a	ctivitie	es Mess	ages (0)	Project p	ortfolio	Active	e tasks	Assigr	nments	Report	ing 🔉	<b>D</b> 1	Product	develop	ment p	roject											
	0				_	<u></u>	[		_	Ø													Filter enter y	our search	text 🗙	¥	<u>ç</u>
	ave		ioto	Print	Reso		ad Re	lease	Pro	perties												14 A				L	
5	9	.= 1=	1	$\leftarrow \rightarrow$	<b>↓ Τ</b>	+ •	X			Desig	gn viev	V				~	1	马 语	Da	te 11/2	2/2020	~ 🖬		CCPM 📑	• 🔭 .	•••	
	#	ID	Name			Size	Prj dura	ation	Sun	Mon 2	3 Nov	2020					Mon 3	30 Nov	2020								
									S	m	t	W	t	f	S	S	m	t	W	t	f	S					
E	1	D01-T7	Confirm	m requirem	ents		4	days															Property				Value
E	2	D01-T8	Concer	ot			4	days			×	<u> </u>											Project start			Thu	8 Oct
	2		Floctro	nice			10	dave							_								Calculated sta	rt	Sun 22	2 Nov	16:00
	5	001-15	Liectio	niics			10	uays															Calculated fini	sh		Wed	2 Dec
	4	D01-T10	Constr	uction			4	days						È									Due date			Tue	1 Dec
E	5	D01-T11	Softwa	re			6	days					ř										Due date perf	ormance		Or	ı time
	6	D01-T12	Integra	ation			10	davs					_			,							Shortest path			28	days
	U	001 112	integre				10	uuys															Critical chain			28	days
																							Critical chain	Jap			
																							Project buffer				None
																							Resource hour	S			0h
																							remaining				0h



## Add Tasks



\* Background of this process is the optimization of the performance and prevents that any (small) change triggers a re-calculation of the complete (large) project plan

# Add more tasks





# Save

30																				
						Sort	t smallest	to large	st											
						Sort	t largest t	o smalle	st		F	Riaht clic	k on he	ader o	of the task	list. to				
My ac	tiviti	es Messa	ages (0) Project p	ortfolio	Active	tas 👱 Clea	ar filter				°O(	remove o	any unv	vanted	filter or so	ortina.				
	<u>ل</u> ات				L	Clea	ar all (sor	t+filters)	)											Г
	<u> </u>		Z E	Pecou		a 🛛 🖾 Add	column a	after											─ F	Filter
	ave	/		Resour											<b>7</b> - 3 .		11/20/		الاستغا	
2		= + =		*	+ •	_ ≂ _	<b>F</b>							× No no no		野 Dat	e 11/26/.	2020		
	#	ID	Name	5	bize H	Prj duration	Resour	Thu 20	6 Nov	2020		Mon 30	) Nov 2	2020			<i>c</i>	Mon 07	Dec 2	.020
								t	t	S	S	m	t	W	Click on A	uto scale	tor an a	adjusted	timebo	ar
	1	D01-T7	Confirm requiren	nents		4 days	Add +													
	2	D01-T8	Concept			1 day	Add +													
	3	D01-T9	Electronics			1 day	Add +													
	4	D01-T10	Construction			1 day	Add +													
	5	D01-T11	Software			1 day	Add +													
	6	D01-T12	Integration			1 day	Add +													
	L		J																	
	Eacl	n tasks get	ts its own ID			Change T duration h	ask Iere													





# Add Dependencies between tasks

32

Button The de click o	for ad fault n butto	lding is a Fi n, wit	depeno inish-St hout op	dencies be art depen pening dro	etween to idency (ji op-down)	asks. just 1)	tasks Assi	gnments	Us R In	e the d	rop-dowi typically	n to se only	ee all op Finish St	otions. art is us	sed.							
Sav	e	Go 101	) to Produc	Print ct developr	Resou nent pro	urce loa	d Release	e Proj	perties	sign vie	Finish->Si Finish->Fi Start->Sta Start->Fin	art nish rt ish	Ctrl+L Ctrl+M Ctrl+N Ctrl+O		~		<b>,</b> 6	Date	11/2	8/2020 ~	· 🔛	Filter
#	ŧ	ID	Name		1	Size I	Prj duràtion	Resour	Sat 2 s	28 Nov s	Mon 30 m	Nov t	2020 W	t	f	s	S	Mon 07 m	7 De t	ec 2020 W	t	f
	. D0	1-T7	Confirr	m requirem	nents		4 days	Add +														
	2 D0	1-T8	Concep	pt			4 days	Add +					]									
	3 D0	1-T9	Electro	onics			10 days	Add +					Betwe	en task	1 and	d 2 the	ere is a					
2	D01	-T10	Constr	uction			4 days	Add +					Finish-	Start re	lation	•						
9	5 D01	-T11	Softwa	ire			6 days	Add +					See al	so the (	CTRL	Fast-k	(eys!					
•	5 D01	-T12	Integra	ation			10 days	Add +					]		L							
Τα	sk 1 ar	nd 2 d	are sele	ected for a	adding c	a depe	endency															



## You can also select Tasks with your mouse in the Gantt Chart to add a dependency

My	activit	ies Messa	ages (0)	Project portfo	olio Acti	ve tasks	Assig	nments	Report	ing 🗙	D1 Pr	oduct d	evelopm	ent proj	ect							
	3ave	G	•	<b>Print</b>	Resource	oad Re	ase	Pro	y perties							1						Filter
5	0	* <b>= 1</b>	•	← → ↓	<b>↑</b> +				Desig	gn view					$\sim$		<b>,</b> 8	Date	11/22/	2020 ~	· 🔛	iiii 🖉
	#	ID	Name		Size	Prj dura	ation	Resour	Sun	Mon 23	3 Nov	2020					Mon 30	D Nov	2020			
									s	m	t	W	t	f	S	s	m	t	w	t	f	S
Ę	] 1	D01-T7	Confirm	n requirement	s	4 (	days	Add +														
Ę	2	D01-T8	Concep	t		4 (	days	Add +									È					
E	3	D01-T9	Electror	nics		10 (	days	Add +							E			:::::2				
E	] 4	D01-T10	Constru	iction		4 (	days	Add +														
Ę	) 5	D01-T11	Softwar	e		6 (	days	Add +								Dep	bendend	y will	go tro the new	m the	task stod	
Ę	6	D01-T12	Integra	tion		10 0	days	Add +								Sei		tas	k(s)	(i selec	lied	



### Add dependencies via the Edit Boxes Predecessor box and Successor box



#### Deleting dependencies Via Task properties → Tab "Dependencies"



## Add/update dependencies Select view → Data entry view

🚳 м	ike D	empsey	/														_		×
File	E	dit	View	Project	Tabs	Co	nfigure	Help											
My ac	tivitie	es Mes	Ga	antt view	Alt+	-G	asks A	signments	Reporting	X D1 Product dev	elopment project								
	0		🗸 Da	ata entry view	Alt+	F6	7		<pre>S</pre>							Eiltor	enter vour search text	¥ ¥	Ω
S	ave		Ca	ards view	Alt	+C	Relea	se Prop	perties							Filler		<u>^</u>	<b>20</b>
5	2	*= <b>1</b> =	Op	oen calendar eo	ditor	F6	× st	- 🔁 🕅	Design vi	ew		- 🔁 📑 🖡	🔒 🛛 Dat	e 11/22/20	020 v 🔛	<u>1</u>	ссрм <table-cell-rows> 🏅</table-cell-rows>	< h	
	# 5	Status	Op	oen skill editor		F7	int date		Start	Stop	Expected start	Expected st	op Prede	cessors	Successors				
			Op	pen resource eq	ditor	F8									_				
/ L	1	lot start	ed A	s soon as possi	ble			Sun 22 I	Nov 16:00	Tue 24 Nov					2		Property		
	2	lot start	ed A	s soon as possi	ible			Т	ue 24 Nov	Wed 25 Nov 8:00			1		3		Project start	-	TI
	3 1	lot start	ed A	s soon as possi	ible			Wed 25	Nov 8:00	Sat 28 Nov 16:00			2		6		Calculated start	SL	in 22 Nc We
	4 1	lot start	ed As	s soon as possi	ible			Mon 30 I	Nov 16:00	Wed 2 Dec							Due date		Τι
	5 1	lot start	ed A	s soon as possi	ble			M	on 30 Nov	Wed 2 Dec						11.	Due date performan	ce	
	6 1	lot start	ed A	s soon as possi	ible			Sat 28 I	Nov 16:00	Wed 2 Dec			3				Shortest path		
																	Critical chain		
												L					Critical chain gap		
																	Project buffer		
																	Resource hours		
																	remaining		
<																>	Statistics Skills R	esources	• •



# **Review result and statistics**



# Select "Critical Chain View"



Only tasks on the Critical Chain are displayed





# Add skills (and resources)



#### Adding Skills via the Resource requirements column

My activi	ties Messages (0) Project	portfolio Active tas	ks Assignments Reportin	g X D1 Produc	t development proj	ect										
l o		<u>55</u>									Filter enter	your se	earch text		X¥	Q
Save	Goto Print	Resource load	Release Properties													_
50	*∃ #∃ == #∃ ← →	↓ ↑ + - ×	🕻 📑 🔻 🔁 💥 Design	view		~ 🍹	<b>}</b> &			Date	11/22/2020 🔻	/ 🔛	111 L	CCPM <table-cell-rows> 🖥</table-cell-rows>	× 74	
	# Name	Size Prj duration	n Resource requirements	Task man Sun	Mon 23 Nov 2	020	c	Mon	30 Nov 2	2020						
Eh	1 Confirm requirements	[4 days	Projec [*SC] V	s	m t	w t	f S	s m	t	W	t f	S				
	1 comminequirements		System [*BH] X			lanager, Syste	m Engineer						enter your searc	:h text		×
	2 Concept	[4 days]	] System [*BH] 🗙	Add +		System Engir	eer						System Engi Designer	neer		^
			Add +										Designer	ngineer		
	3 Electronics	[10 days]	] Electr [*JM] 🗙	Add +	[		Elec	tronics Eng	gineer				<ul> <li>Engineer</li> </ul>			
	4 Construction	[4 days]	Mechan [*CB] X	Add +				hanical En	ainear				Engineering	Team		
			Add +						gineer				Hardware Ei	ngineer		
	5 Software	[6 days]	] Softwa [*JS] 🗙	Add +		Ľ	Soft	ware Engir	neer				Mechanical I	Engineer		
			Add 🕂										🔲 Project Man	ager		
2 🗈	6 Integration	[10 days]	] System [*SH] 🗙	Add +			È		s	ystem	Tester		Software En	gineer		
		L	Add +										Software le Supplier	am		~
			Skill Show resources			New							Statistics Skill	Resources	Task ma	4 1
× 1 00			syst		✓ ← →	×							Skiil			
1 23	6 D01-112	Integration	S: System Engineer													
Task	status start group	Messages (0) Ge	en		Clos	stom fie	lds Schedule	ed intervals	Visual	Trackin	g Workpack	age	Burn up graph	lanned costs		
	t started	Requirements (edit	<u>t</u> )				Team mer	mbers					Visible on I	My Activities pa	ige?	
	mpleted	Resource/Sk	kill			Est	ir Skill F	Resource	Units							
	used	🝪 S: System Te	es		rs/80h 1	00%										
Ab	orted		-		10 uays/80h 1	00%										
Re	eady to start?						Team cann	iot be set, s	kill is not a	a team			Updated: Sun 11 Oct 17	:36 by you		
	efault Get started TameFlow G	et started with LYNX														



# Review the resource load for your project



# Modify Task Estimated Time and Units % (optional)





# Review the resource load for your project (scenario Virtual Skills) *Skills are "Virtual skills"*

My activit	es Messages (0)	Project	portfolio Active	tasks Assign	ments Reporting X	Product Development Proj	ect						
당 Save	Goto	Print	Resource loa	d Release	Properties				Filter enter	your search text 🗙 🌠	<u>Q</u>		
50		← →	↓ ↑ + -	Х Ё -	🔁 💥 Design view	1	~ ]	🔩 🕀 Date 11/17/2	2020 ~ 🖬 🖬 🖉	ССРМ <table-cell-rows> 🎠 🛼</table-cell-rows>			
	# ID Name	Size	Prj duration Tu	ie 17 Nov 20 twt	20 fss	Mon 23 Nov 2020 m t w t	fs	Mon 30 Nov 202 s m t w	21				
	1 First Task		[2.5 days]		Supplier,System Er	ngineer			Property Project start	Value			
	2 Task 2		[2 days]			Designer,System Tes	te	d - Product Development Proje	Calculated start	Mon 12 Oct			- 0
	3 Task 3		[2 days]			Designe	r 🔛 Options 🛄	🔊 🕂 🌽 🏷 Show load ear	ly				
	4 Task 4		[1.5 days]			Ľ	Range 🔒 Proje	ct Task Week 4 weeks Quart	er 6 Months Year Other 📑				
	5 Task 5		2.5 days				FILTER F	all all					
							Re Tatal warks 0.4h	sources (8): Barry Huberts,Carl Bra	ndon,Jack Morgan,Jane Sanders,Mike De	mpsey, Steve Horner, Sven Cramer, Tom Smith	1		
			_				Oct 2020 12 19	Nov 2020 26 02 09	Dec 2020 16 23 30 07	Jan 2021 14 21 28 04	11 18	Fe 25 0	eb 2021 1 08
							20 10 0	ester Average: 3% Work: 16	1/ 16h Unallocated: 512h				
(			> <				System E	ngineer Average: 6% Work:	32h/ <b>32h</b> Unallocated: 496h				
18	2		Task 2				20 10						
Task s	tatus <u>st</u> arted	art group	Messages (0) Requirements	General Con	straint Dates Reso	urce requirements Depende	nci Supplier	Average: 1% Work: 4h/ <b>4h</b> Ur	allocated: 524h				
O Sta	ted npleted sed		Resource	/Skill ner [16h]	Estimated time 2 days/16h	Units Status Est 100% Not started	in <u>10</u> 0		I				
	rted		😮 V: Syster	n Tester [16h]	2 days/16h	100% Not started	20 10	Average: 6% Work: 32h/ 32h	Unallocated: 496h				
In ca	se of "Virtu	al Ski	Ils" LYNX	does not	make		0						
a pre	e-selection of	and so	oft-allocate	es a re <u>so</u>	Jrce		Resource load Re	esource gantt					
name	. Please re	efer to	SLIDE 19										

-data



# Add Task Managers

#### Invite multiple Task Managers involved to the TM List

In a CCPM implementation typically a Task Manager is responsible for (daily) task updates



### Add a Task Manager to task(s) Via the Task Manager column or via "Drag & Drop"

Mike Dempsey He Edit View Project	Tabs Configure Help	Add yourself as Task Manager
My activities   Messages (0)   Project	portfolio Active tasks Assignments Reporting X D1 Product development project	to the first task
Save Goto Print	Resource load Release Properties Filter enter your search text	× 🕺 🖸
5 ⊘ = = = = = ← →	🔸 🛧 🕂 🗙 🚉 🙀 Design view 🗸	🔁 📴 ate 11/22/2020 🗸 🔛 🖉 🖉 CCPM 🤰 🎠 📜
# Name Si	ize Prj duration Resource requirements Task managers Status Su Mon 23 No	ov 2020 Mon 30 Nov 2020
	s m t w	vtfssmtwtfs
2 1 Confirm requirements	[4 days] System [*BH] MD Add Not starte System Projec [*SC]	n Engineer,Project Manager Invite enter your search text
Mike Dempsey (curre	ent [4 days] System [*BH] X Add + Taskmanager	1/1 Mike Dempsey
user) is added to task	#   10 days]   Electr [*JM] ×     Add   +	Close cs Engineer
4 Construction	[4 days] Mechan [*CB] X Add +	al Engineer
5 Software	[6 days] Softwa [*JS] 🗙 Add 🕂	Engineer
6 Integration	[10 days] System [*SH] X Add	System Tester
	> <	> Skills Resources Task managers Re
/ 🕄 1 D01-T7	Confirm requirements	
Task status start group	Messages (0) General Constraint Dates Resource requirements Dependencies Custo	om fields Scheduled intervals Visual Tracking Workpackage Burn up graph Planned costs
Not started		sk manager(s)
OStarted	Duration [4 days]	ke Dempsev
	ETTC Auto expand	
	Priority 500	IM
	Tasktype Normal	
Ready to start?		

47



# Apply CCPM Behavior



# <sup>50</sup> Start a project from a template

# Start a project from a template *Where to find available templates?*





# Start a project from a template





# Start a new project from a template

My activitie	es   M	essages (0)	Project portfolio	Active task	<s< th=""><th>Assignments</th><th>Reporting</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></s<>	Assignments	Reporting							
0		9	P.	9.						L L		<b>77</b>		
Save a	ve all Open Add Dele		Delet	e	Propertie	es Progress	Progress chart N		s Resource	Resource load		Debuffered	Scenario	
Search St	Search Status: Not started													
- CD 🖨	🚔 🕅 Templates 🍹 Show all 🌠Not started 🌾 Released 🛛 🗮 Timeline 🔛													
ID	Ref.	Description		<u></u>	PM	Status	Start	Er	nd E	xpected finish	CCPM	Performance		
D01		D1 Produc	t development	project	MD	Not started	Thu 8 Oct	Tue 1 De	ec	n/a		n/a		
D02	D02 Product development project					You can find your new project under "Not Started"				n/a		n/a		



# 54 Special Items

Summary Tasks Milestone Buffers

# **Special Items**

Summary Tasks

- Projects with multiple end-points:
  - Milestone Buffer(s)
  - Project Buffer





# Release your project

Create active tasks

1003	e your pro	JECI	Project properties	? ×
d ite	tacks		General Custom fields Project dates Scheduling Resource availability Critical chain	
1112	ιασησ		General project properties	
			Project ID D01 unique ID, 3 - 9 characters long	65634
			Description D1 Product development project	
My activitie	Selec Prope es Messages (0) Project portfolio	Project erties	Reference     enter a reference to identify this project       Status     Not started       Not started     Released       Calendar     Paused       Completed     Aborted	2 The release of the project has resulter in an update and
Save	Goto Print Re	sol d Properties	Project manager Mike Dempsey V Invite Shared with User Read & write	Filt <sub>er</sub> enter extension of the statistics
50	*≡ 3≡ 1≡ 7≡ ← → ↓ 1	• + • × 📰 •	z 💥 Schedule view 🗸 🔁 🕹 👍 ate 11/23/20	020 🗸 🛗 🔛 🦉 🛛 Tags 0 - Thu 8 Oct 15:57 🛛 🗸 🏹
#	ID Name	Buffers M	on 23 No Mon 30 No Mon 07 De Mon 14 De Mon 21 De Mon 28 De Mon twtfssmtwtfssmtwtfssmtwtfssmtwtfssmtwtfssmt	n 04 Ja Mo wtfssmt
1	D01-T7 Confirm requirements	0% 0%	Gystem Engineer, Project Manager	Property Value
2	D01-T8 Concept	0% 0%	System Engineer	Project start     Thu 8 Oct       Calculated start     Wed 25 Nov       Calculated finish     Sun 29 Nov 16:00
3	D01-T9 Electronics	<b>0%</b> n/a	Electronics Engineer	Due date         Tue 1 Dec           Due date performance         7 days early
4	D01-T10 Construction	0% 0%	A Mechanical Engineer	Shortest path 14 days Expected finish Tue 1 Dec
5	D01-T15 [FB] Construction	n/a 0%	<b>₽</b> 0%	Critical chain 14 days
6	D01-T11 Software	0% 0%	<b>D</b> Software Engineer	Current longest chain         14 days           Longest chain compl.         0%
7	D01-T14 [FB] Software	n/a 0%	<b>₽</b> ₽%	Curr. longest chain gap
8	D01-T12 Integration	<b>0%</b> n/a	System Tester	Critical buffer Project buffer Buffer consumed 0%
	D01-T16 Project buffer	<b>0</b> % n/a	0%	Feeding chain compl 0%
9	-			

buffer controls (project buffer column and feeding buffer column)

#### a-dato

# Select My activities in the Desktop Window Update Ettc for your first task



filter resources matching resources: other resources:

# <sup>59</sup> A few tips and tricks

# Search and Replace (CTRL F)

My	activitie	es Me	essages (0)	Project portfolio	Active tasks	Assig	nments	Reporting	< D	01 Pro	oduct devel	opment project					
	0			P.	<u>R</u>		<u>A</u>	-					77				
S	ave all	[1]	Open	Add	Delete	F	Propertie	s Progres	s char	rt	Notes	Resource load	TameFlow	Debuffered	Scenario		
Sea	rch <sup>St</sup>	atus:	Released							A	dvanced s	earch				×	×
¢	Φрт	empla	ites 🍹 Sł	now all 🛛 🍟 Not s	started 🌾 Re	elease	d 🎫	Timeline 🔚		1	🔍 Find	🔁 Replace					
	ID	Ref.	Description	I		PM	Status	Sta	rt		Find wh	at:		Look for:			
8	D01		D1 Produc	t development	project	MD	Released	d Thu 8 O	ct T	ue				🗙 <all mat<="" td=""><td>ches&gt;</td><td>~</td><td></td></all>	ches>	~	
			resource hou	rs: 160h remaining:	160h - 100%												
											Cas	e sensitive					
											Who	ole words only					
											🗌 Use	regular expressions					
													F	Find previous	Find next		
																_	
													1	Activate filter	Find all		



# **Mark Favorites**

My activit	ties Messa	ges (0) Project portfolio	Active tasks Assig	nments Reporting X D1 Product development project								
3 Save	G	to Print Res	source load Properties	·	Filter ente	er your search text	× 🍕 😡					
50	.,≣ <b>‡≣</b> .	"≡ न≡ ← → ↓ ↑	·+- × ≓-	🔁 💥 Schedule view 🗸 🍹	<mark>클</mark> 윤	Date 11/23/2020	~ 🖬 🖬 🖉					
Tags 0 -	ags 0 - Thu 8 Oct 15:57 🗸 🥥 🃿											
#	ID	Name	Buffers	Mon 23 N Mon 30 N Mon 07 D Mon 14 D Mon 21 D Mo mtwtfssmtwtfssmtwtfssmtwtfssmt	on 28 D Mon 04 J M wtfssmtwtfssm	( t						
1	D01-T7	Confirm requirements	0% 0%	Cystem Engineer, Sven Cramer		enter your search text	×					
2	D01-T8	Concept	0% 0%	D-System Engineer		<ul> <li>Project Manager</li> <li>System Engineer</li> </ul>						
3	D01-T9	Electronics	0% n/a	Electronics Engineer		🗋 Designer						
4	D01-T10	Construction	0% 0%	Mechanical Engineer		Electronics Engineer     Engineer						
5	D01-T15	[FB] Construction	n/a <b>0%</b>	<b>1</b> −0%		Engineer     Engineering Team						
6	D01-T11	Software	0% 0%	Software Engineer		Hardware Engineer						
7	D01-T14	[FB] Software	n/a 0%	<b>1</b> −0%		Marketing						
8	D01-T12	Integration	<b>0%</b> n/a	System Tester		Mechanical Engineer						
9	D01-T16	Project buffer	<b>0%</b> n/a	0%		Software Engineer						
						Supplier						
						<ul> <li>System Tester</li> </ul>						
						Trainer						
						Chalinting of the Descent of T						
<			>	<	>	Staustics Skills Resources Ta						



# A few tips and tricks

#### FIND MORE TIPS AND TRICKS: <u>https://support.a-dato.com/hc/en-us</u>





Ctrl



# Continued



Right Click on a project row

All windows can be individually moved. You can use 2 screens side by side.





#### **Resolve Warning Messages**

Plan cannot be calculated due to planning logic violations



# Start adding "Notes"





# **Special Items**

- Buffer Recovery
- Level of Effort Tasks
- One Click "Click-through" from a task in the task-list, directly into the project
- Down-stream / Upstream chain views based on any selected task in the schedule
- Ability to share de-buffered plans with external parties or customers
- Possibility to exclude tasks from task time reduction
- Cross-skill Resource Management
- Split Critical Chain tasks in case of multiple resource with different workload
- Auto Complete Option
  - intended for tasks with long and or fixed lead times only (such as shipping or purchasing tasks)
- Display of "Last Progress Update"
  - o for tasks that are started, which provides fast feedback when the last ETTC update has taken place

