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XLProject®

Version 1.1

The simple project management tool for MS Excel

User Handbook

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1. System Requirements

XLProject® requires the following system prerequisites:

- Windows 98 / ME / NT / 2000 / XP

- MS Excel 2000 / XP / 2003

2. Installation

To install XLProject® follow the procedure below:

1. Open the XLProject® file in MS Excel.

2. The installation requires that macros can be activated. Depending on the security level in MS Excel the macros will be loaded or not. If the following warning appears:
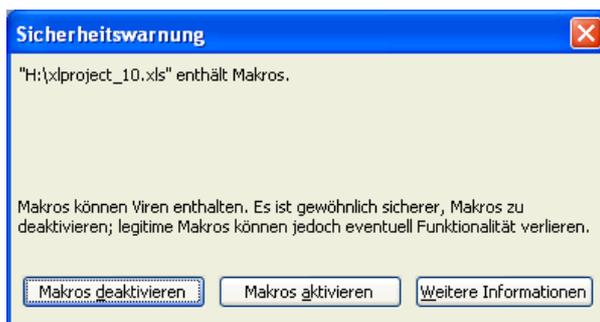
3. choose "activate macros" and continue the installation. If the following message appears:

the following procedure must be applied:

MS Excel 2000	Menu "Tools"	→ "macro"	→ "security"	→ medium	
MS Excel XP	Menu "Tools"	→ "Options"	→ "security"	→ macro security	→ medium
MS Excel 2003	Menu "Tools"	→ "Options"	→ "security"	→ macro security	→ medium

4. Close the XLProject® file in MS Excel and open it again.

5. In the following dialog box you can select the language of preference:

Choose the desired language and press „Weiter / Continue". The following languages are available at the moment:

- German

- English

To change the language proceed to chapter 6 "Change Language".

6. The following registration mask appears. Enter your registration key and press "Register" or press "Test" to evaluate the software for 30 days.
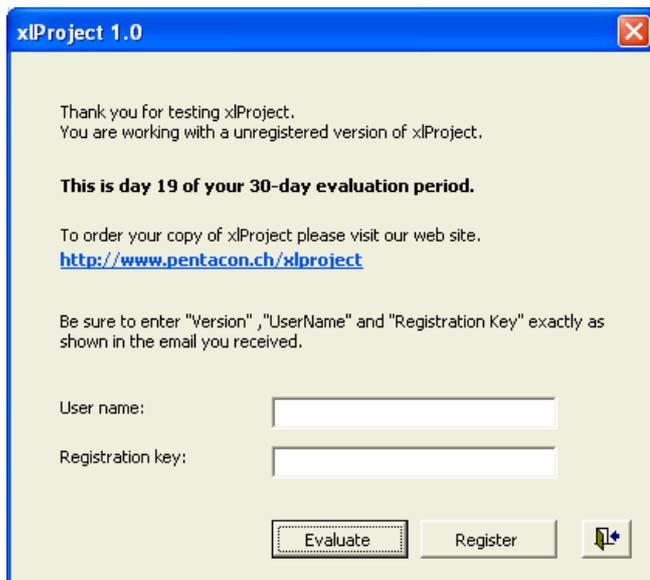
7. The installation is successfully finished when the worksheet "Basis Data" appears.

Important notice:

Save your original XLProject® file in a save location. If any mishandling changes the macro settings etc. you will have to start with a new copy of your original file.
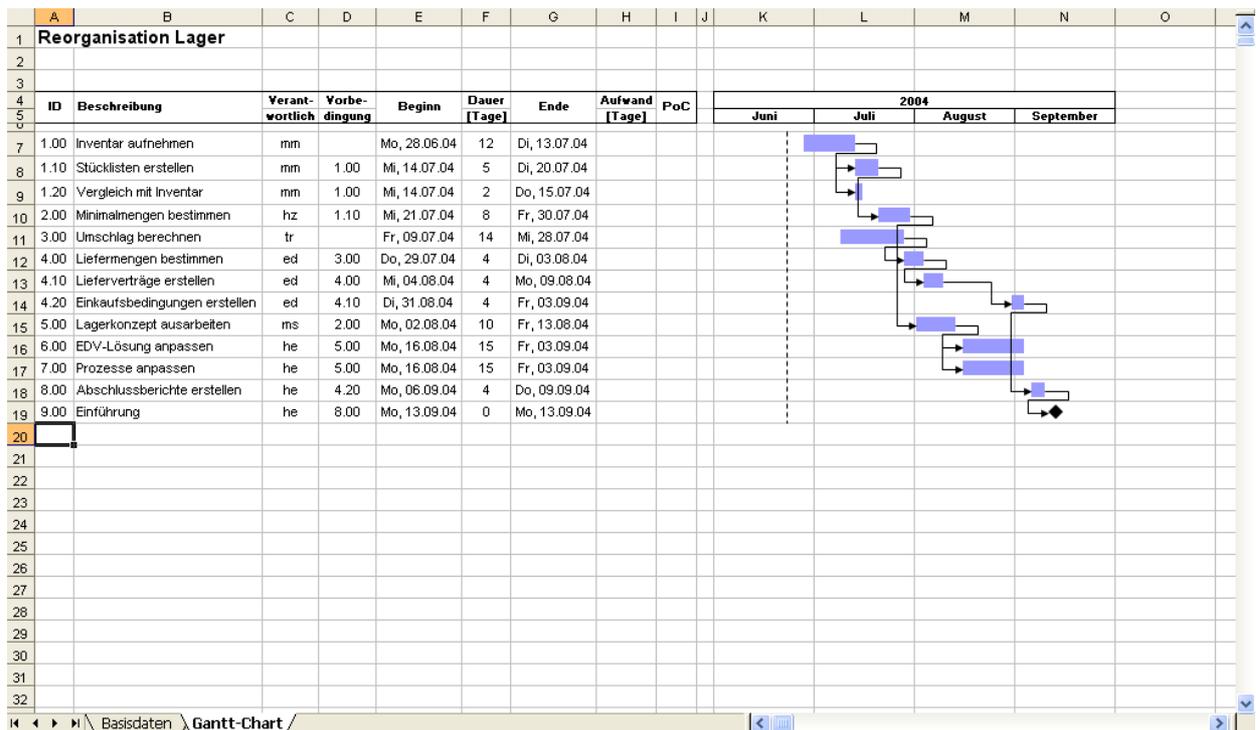
3. Worksheet "Basic Data"

In the worksheet "Basic Data" you enter or change the following project data:

Project-Properties

Project name	Reorganisation repository
Project manager	John Miller
Begin of project	Di, 06/01/04
End of project	Do, 09/30/04
Unit on time axis	Month
Working days / calendar days	Weekdays
Date format	MM/DD/YY
Paint dayline	yes
Adjust printout to 1 page	yes
Adjust printarea dynamically	no

Create / update project

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Project name	Enter a project name. This project name appears on each page of the Gantt chart.
Project manager	Enter the name of the project manager. This name is for internal use only.
Begin of project	All tasks must start after this date. Otherwise the cell will be marked "yellow".
End of project	All tasks must end before this date. Otherwise the cell will be marked "yellow".
Unit on time axis day / week / month / quarter / year	Choose appropriate time scale.
Working days / Calendar days	You can choose between "working days" and "calendar days". In "working day" mode Saturday and Sunday will be ignored. In "calendar days" mode all days incl. Saturday and Sunday" will be allowed.
	Example: If you define "start date" on a Friday and "duration" is 3 days then in "working days" mode the task finishes the following Tuesday and in "calendar days" mode the same task finishes the following Sunday.
	Public Holidays must be entered manually.
Paint dayline yes / no	A vertical line visualises the actual date.

Date format	Here you are able determine how the date fields should be displayed. The following date formats are supported: **Format** **Display (Monday, November 15 2004)** DD.MM.YY Mon, 15.11.04 MM/DD/YY Mon, 11/15/04 MM-DD-YY Mon, 11-15-04 YY-MM-DD Mon, 04-11-15 Note: The written working day is displayed as defined in the windows country settings. The windows country settings can be changed in the Regional settings (Start → Control panel → Regional settings).
Adjust printout to 1 page yes / no	Define whether the printout of the Gantt chart shall be adjusted to 1 page. Choosing "no" can provoke page breaks.
Adjust printarea dynamically yes / no	Define whether the printout shall contain all columns or just the columns up to the actual date. Example: If your project runs from January until December and the actual date is June then choosing "no" means that the printout contains all columns. Choosing "yes" means that the printout contains the columns January through June only.
establish / actualise project	The Gantt chart will be drawn or actualised according to the actual configuration. If the project does not contain any data the Gantt chart will be formatted. No data will be erased.

4. Worksheet "Gantt Chart"

In the worksheet "Gantt Chart" you enter the tasks and their correspondent information:

Reorganisation Lager

ID	Beschreibung	Verant-wortlich	Vorbe-dingung	Beginn	Dauer [Tage]	Ende	Aufwand [Tage]	PoC
1.00	Inventar aufnehmen	mm		Mo, 28.06.04	12	Di, 13.07.04		
1.10	Stücklisten erstellen	mm	1.00	Mi, 14.07.04	5	Di, 20.07.04		
1.20	Vergleich mit Inventar	mm	1.00	Mi, 14.07.04	2	Do, 15.07.04		
2.00	Minimalmengen bestimmen	hz	1.10	Mi, 21.07.04	8	Fr, 30.07.04		
3.00	Umschlag berechnen	tr		Fr, 09.07.04	14	Mi, 28.07.04		
4.00	Liefermengen bestimmen	ed	3.00	Do, 29.07.04	4	Di, 03.08.04		
4.10	Lieferverträge erstellen	ed	4.00	Mi, 04.08.04	4	Mo, 09.08.04		
4.20	Einkaufsbedingungen erstellen	ed	4.10	Di, 31.08.04	4	Fr, 03.09.04		
5.00	Lagerkonzept ausarbeiten	ms	2.00	Mo, 02.08.04	10	Fr, 13.08.04		
6.00	EDV-Lösung anpassen	he	5.00	Mo, 16.08.04	15	Fr, 03.09.04		
7.00	Prozesse anpassen	he	5.00	Mo, 16.08.04	15	Fr, 03.09.04		
8.00	Abschlussberichte erstellen	he	4.20	Mo, 06.09.04	4	Do, 09.09.04		
9.00	Einführung	he	8.00	Mo, 13.09.04	0	Mo, 13.09.04		

4.1. Entering Data

The columns A to I represent the entry area. Every column is described as follows:

ID	In this column a unique task ID has to be entered. If you enter an already used ID the cell will be marked orange.
	This column supports WBS (Work Breakdown Structure) e.g. tasks can be described with a number of sub-tasks:
	Example: 1.00 / 1.10 / 1.20 / 2.00
	The columns can be sorted with the MS Excel function with any criteria.
Description	Description of the task.
	Enter any text describing the task.
Responsible	Description of the responsible resource for this task.
	Enter any text describing the responsible resource.
Predecessor(s)	If a task depends on one or more tasks enter the ID of the predecessor task(s) here. An arrow will be drawn from the predecessor(s) to this task.
	This task shall only start after the predecessor(s) have been finished. The earliest start is 1 day after the end of the predecessor task(s). If this rule is violated the cell will be marked red.
	The predecessor ID's must be separated with a semicolon [;]
Begin	Start date for this task. For additional information the day of the week will be displayed.
	Entering invalid data will mark the cell yellow, orange or red. The colours indicate the following errors:

	yellow start date is outside "start of project" or "end of project"
	orange start date is not a valid date or greater than "end date"
	red a predecessor does not exist or ends the same day or later than the successor
Dur. [Days]	Duration of the task in days.
	Any part of a day can be entered in decimal digits e.g. 0.5 for a duration of half a day.
	Entering a zero turns the task into a milestone. The milestone will be displayed as a black diamond.
	The calculation of duration depends on the parameter setting of "work days / calendar days" (see chapter 3 Worksheet Basic Data).
End	End date of this task. For additional information the day of the week will be displayed.
	Entering invalid data will mark the cell yellow, orange or red. The colours indicate the following errors:
	yellow end date is outside "start of project" or "end of project"
	orange end date is not a valid date or smaller than "start date"
	red a successor starts the same day or before "end date"
Expend. [Days]	enter the planned expenditure for this task in days.
	entering data in this field is optional. You can hide this column but do not delete it.
PoC	Enter a digit in [%] representing the degree of completion (Percentage of Completion).
	A red line in the bar graph visualises the PoC for this task. For milestones (duration = 0) no PoC will be drawn.
	entering data in this field is optional. You can hide this column but do not delete it.

4.2. Permitted Changes in Excel Worksheets

The following changes may be applied to the worksheet "Gantt Chart" in order to guarantee proper function:

- Changing column titles

- hiding rows or columns and changing their height and width

- sorting data from row 7 downwards

The Gantt chart will be actualised after changing cell content. XLProject® or MS Excel cannot recognise any changes like deleting rows etc. Pressing F2-key and confirming with Enter will actualise the Gantt chart.

4.3. Prohibited Changes in Excel Worksheets

The following changes may not be applied to the worksheet "Gantt Chart" in order to guarantee proper function:

- Neither rearranging nor deleting data in rows 1 to 7

- Not deleting columns A to I. These will be used by XLProject®

- Neither changing nor deleting MS Excel names

5. Tutorial: How to establish a Gantt Chart

1. Open the XLProject® file and save it under a new file name.

2. Choose worksheet "Basic Data" and enter the necessary data of your project:

Project-Properties

Project name	Project name
Project manager	Project manager
Begin of project	01.06.2004
End of project	30.09.2004
Unit on time axis	Month
Working days / calendar days	Weekdays
Paint dayline	yes
Adjust printout to 1 page	yes
Adjust printarea dynamically	no

Create / update project

3. After completing this press "establish / actualise project".

4. The worksheet "Gantt Chart" appears.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1		Reorganisation repository													
2															
3															
4	ID	Description	Respon-sible	Prede-cessor	Begin	Dur. [Days]	End	Expend. [Days]	PoC				2004		
5											June	July	August	September	
6															
7															
8															
9															
10															
11															
12															
13															
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31															

Basic data / Gantt-Chart

If starting from a new XLProject® copy this worksheet will not contain any data. If starting from an already used copy of XLProject® this worksheet may contain data from a former project. To clean this data delete all data starting from row 7 downwards.

5. Start entering data for your new project:
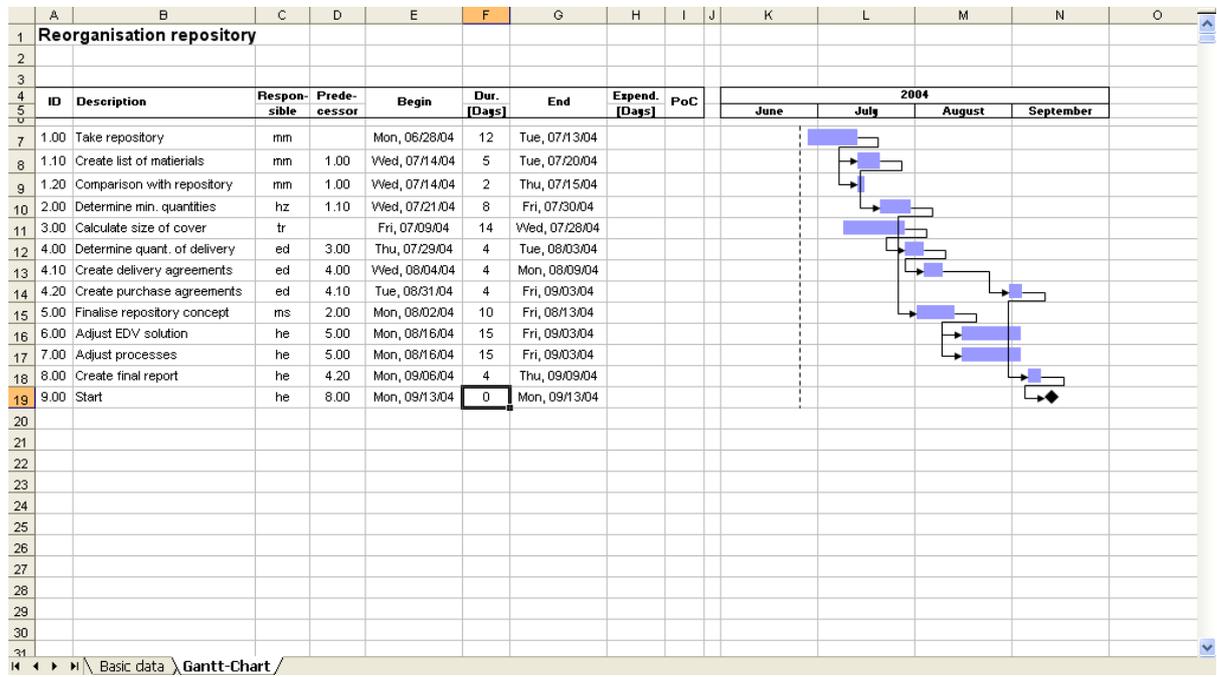
As soon as the columns ID, start date, duration and end date contain data the Gantt chart will be drawn.

6. You can change the worksheet "Basic Data" at any point of your work. After confirming with "establish / actualise project" button the Gantt chart will be redrawn with the new settings. No data will be lost.

6. Change Language

To change the language proceed as follows:

1. Open the folder that contains the XLProject® file.

2. Delete the file "xlproject.ini".

3. Start the XLProject® file again.

4. The dialog for language selection appears.