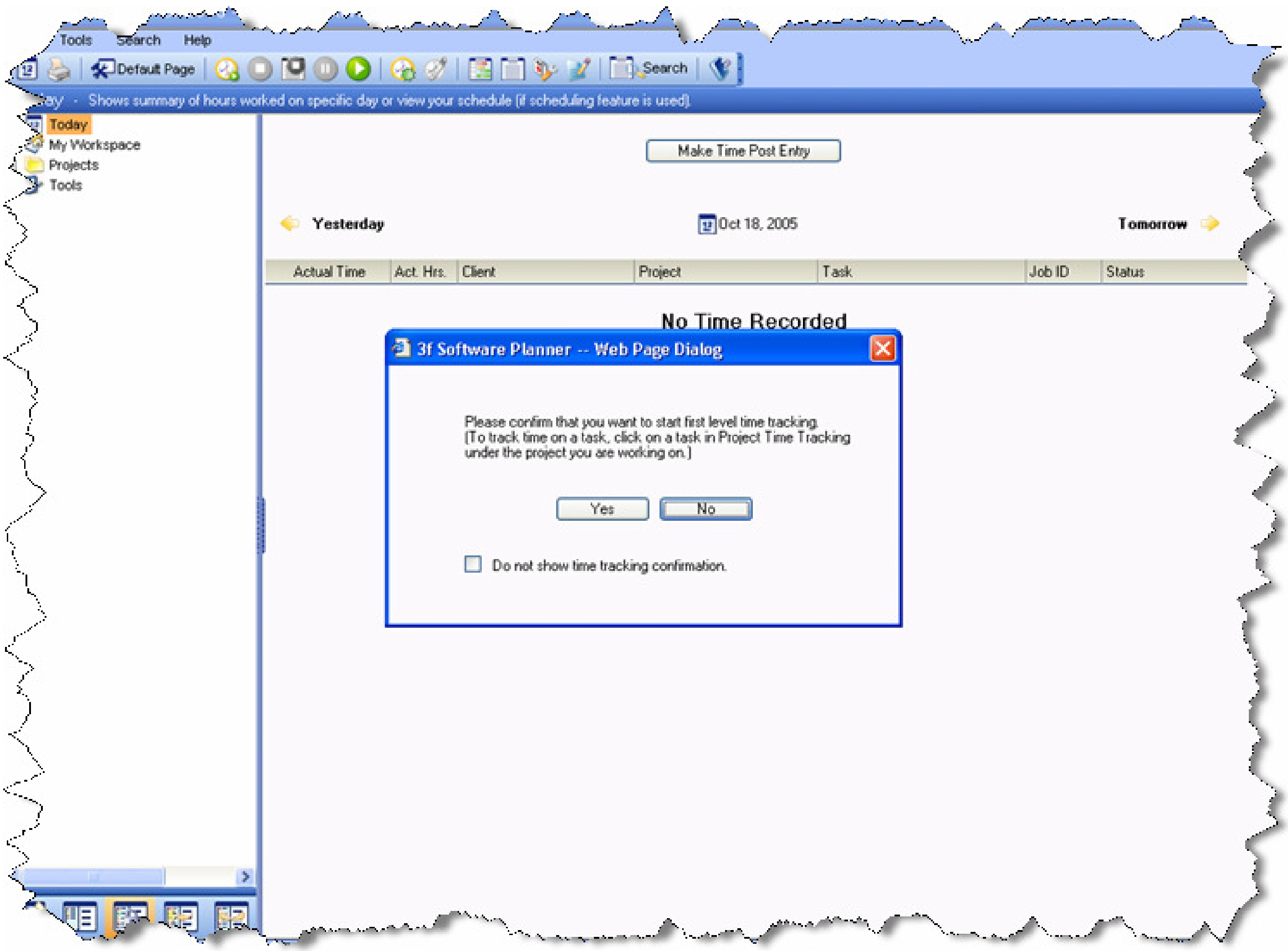
3f Software Planner 2006
Introduction



Project Management. Anytime. Anywhere.

This Getting Started document will guide you through the basic working process of 3f Software Planner 2006. Once you have gone through this paper, you will have a good foundation for working with the system.

It is assumed that (1) you have had the system set up and configured, (2) that you have either a Project Manager or Project Member user account and (3) that you have successfully logged in to the system.

WORKING WITH 3f Software Planner 2006

Step 1. Start daily check-in time tracking (First Level Time Tracking)

Click  to start First Level Time Tracking.

Note: Always stop First Level Time Tracking at the end of the day. Please refer to Step 11 to see how.

Step 2. Start time tracking on a Project Task (Second Level Time Tracking)
Click the Tree View > Name of Client > Project Name > Project Time Tracking
Click the task you wish to track time and work on.

Step 3. Start time tracking on a non project task (Second Level Time Tracking)

Click  to go to the Non Project Task page. Click the task you wish to track time and work on.

Note: Non project tasks are not related to client projects. Use non project tasks to track time for accounting, sales, etc. Create a new non project task by clicking Administration > Non Project Tasks.

Step 4. Stop or cancel time tracking on a task or non project task (Second level Time tracking)
Click Today in the tree view to go to the "Today" page. A directory of today's time tracked is listed.

To stop time tracking, simply click Stop which is found towards the right of the active task.

To cancel time tracking, simply click Cancel which is found towards the right of the active task.

Step 5. Take a break (Second Level Time Tracking)

Click  to pause time tracking on a task.

Click  to restart time tracking after a break. Time tracking will continue on the task you were working on prior to the break.

Note: If your company policy dictates you stop all time tracking during breaks, please proceed to Step 11.

Step 6. Stop daily time tracking (First and Second Level Time Tracking)

Click  to stop all time tracking.

Step 7. Submit timesheet
Click the Tree View > My Workspace > My Timesheet > Today's Date
Recommendation: We suggest you submit Timesheets on a daily basis at the end of your working day. During the day, you can add comments to a task being time-tracked by clicking this icon  Take note that to be able to add comments to a task, time tracking must be running on a task.
Note: To allow time \sheet submission, Second Level Time Tracking must be stopped.

If the task is finished, enter 0 in the "Rem. Hrs." (Remaining Hours) field.
If the task is not finished, enter an estimate of remaining working hours in the "Rem. Hrs." (Remaining Hours) field.
Note: You should only enter the remaining hours for yourself. Do not estimate remaining hours for other team members.

Enter your written report in the yellow field using the "Reporting" function.

Click  to submit your timesheet.

Step 8. Tasks Remaining Hours (applies to you only if you have the Approval Management module and you are the Project Manager)
Click the Tree View > Projects > Name of Client > Project Name > Project Management > Tasks Remaining Hours
The person in charge of the project accepts or corrects the remaining working hours for each individual task as submitted by the resources.

Planned Hrs:	Original planned hours
Rem. Hrs:	Corrected remaining hours
Res. Rem. Hrs:	Estimated remaining hours as projected by team members

Recommendation: We suggest you review your projects on a daily basis, as the remaining hours are the foundation for the Project Overview report.
Note: To set a task to "Finished", enter 0 in the "Rem. Hrs." (Remaining Hours) field across the task.

3f Software Planner 2006 REPORTS

Note: All reports are based on submitted timesheets only.

1. Time Report
Click the Tree View > Projects > Name of Client > Project Name > Project Reports > Time Report
This report shows total hours worked on the active project shown in the status bar at the bottom of the screen.

Set the date range by clicking  "Date from" and  "Date to" then press the Search button.

You may filter results by "Department" and/or "Resource" and you may use the "Group by" option.

2. Project Overview (Applies only to you if you have the Approval Management Module and you are the Project Manager)
Click the Tree View > Projects > Name of Client > Project Name > Project Reports > Project Overview
This report lists all the tasks setup within an active project.

Hours Planned:	Originally planned hours.
Hours Actual:	Realized working hours
Hours Remaining:	Remaining hours of a task as set by the person in charge of the project. (See step 13)
Deviation Planned/Actual:	Difference between planned and realized hours *Formula:* Planned - Actual
Deviation Planned/Current:	Number of hours ahead or behind originally schedule. *Formula:* Planned - (Actual + Rem. Hrs)
% Finished:	The percentage finished for a task *Formula:* 100 * (Actual / (Actual + Rem. Hrs))

3. Project Home (Applies only to you if you have the Approval Management Module and you are the Project Manager)
Click the Tree View > Projects > Name of Client > Project Name > Project Management > Project Home
This is the Project Summary.

Plan Hrs.:	Original planned hours per project phase
Act. Hrs.:	Total realized working hours per project phase
Rem. Hrs.:	Best possible estimation for remaining hours as made by the person in charge of the project per project phase. (See step 13)
Percentage (%):	Percent completed Formula: Act. Hrs / (Rem. Hrs. + Act. Hrs.)

3f Software Planner 2006 ADVANCED FEATURES

1. Quick Time
Using "Quick Time" is handy when a telephone call or unexpected visitors suddenly interrupt. Starting "Quick Time," stops ongoing time tracking (if any) and starts a new time tracking instance without specifying which task, the time for which is being tracked. Upon stopping "Quick Time" you will be asked to assign a task to the accumulated time. Once time has been allocated, 3f Software Planner 2006 can automatically resume time tracking on the task that you were working on when you were interrupted.

Click  to start Quick Time.

Click  to stop Quick Time.

Note: You can choose to assign the accumulated time either when quick time is stopped, or at a later point in time.
To assign the tracked time later, click Tree View > My Workspace > My Quick Time
Click "Assign Task". In the "Unassigned quick time block" page, select the project and task to which you wish to assign the tracked time.

2. Client Requests
"Client Request" is used to record and manage requests made by the client in one place. Client requests are usually tasks or additions which are not part of the original project. Optionally, a client request can be converted into a task.

To add a Client Request
Click the Tree View > Projects > Name of Client > Project Name > Client Request

On the "Client Request Details" page, click the Add New icon  fill out the subsequent page; then click Save.

Note: It is important to enter the client request in the right project. To activate a project, click Project List > Choose Client > Choose Project.

Convert a client request to a task
Click the Tree View > Projects > Name of Client > Project Name > Client Request
Click on the request that you want to convert to a task.

On the "Client Request Details" page, click the "Convert to Task" icon 

The request is converted to a task. To view the new task and add planned hours, click Project > Task, then locate and click the name of the converted task.

3. Project Templates (applies to you only if you have the Approval Management Module and you are the Project Manager)
To save time and avoid omitting standard project tasks, a template can be imported into any project. During the import process you can choose which tasks to import. Templates are created from existing projects by exporting the tasks to be included in the template. You can create different project templates for each type of project you do.

Create a Template
File > Export > XML - Task List

Import a Template
File > Import > XML - Task List

4. Errors and Changes
The Errors and Changes page is where you track all issues within a project. Issues refer to problems, questions or corrections in a project that must be resolved.

To enter a new Error and Change item
Click the Tree View > Projects > Name of Client > Project Name > Errors and Changes

On the "Errors and Changes" page, click the "Add New" icon  and fill out the form.

Note: An Errors and Changes item can be converted to a task.

5. Group, Copy and Rearrange Tasks in the Task List
You can group, copy and rearrange tasks in the task list. To learn more about grouping, copying and rearranging of tasks, we suggest that you view our video tutorial:
http://www.3f-project-management.com/kb/video-tutorial/f2005/ENT_9-1_Grouprearrangeandcopytasks.html

Note: The tutorial is from a previous version of 3f Software Planner, thus, the look and feel is different from 3f Software Planner 2006's look and feel. However, the general principles are the same.

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