

3f Software Planner 2006 Approval Management Module

Administrative Project & Resources Enterprise Tools Search

Default Page Search

Pending Approvals - This page lists pending approvals or approval history grouped by project. Click an item to view its details.

Task - Microsoft Internet Explorer

Approved
 Pending
 Rejected
 Allow Time Tracking

Task: Software Documentation
 Project Phase: Software Design
 Activity: Help writing
 Milestone:
 Hours: 17.00

Keyword (Maximum of 200 characters including spaces.)

Particulars
 Writing software documentation including
 a) Training Manual
 b) Getting started guide
 Suggestion: We write it as PDF files so that the customer can easily train employees.

Resource Assignment

Name	Role	Department / Type
Michael Petersen	Enterprise Manager	Programming
Paul Alger	Project Manager	Programming

 Peter Hansen

Work Breakdown

Details	Hours
3.5.1 Plan software documentation	3.00
3.5.2 Layout	2.00
3.5.3 Writing	12.00

Project Management. Anytime. Anywhere.

This guide will show you how to get started with the Approval Management module. If you need more in-depth explanation, click the Help menu, or press Ctrl + Shift + H on your keyboard to view a Help file.

It is assumed that you have set up a 14-day trial account on our hosted server or that 3f Software Planner has been installed on your own server. It is furthermore assumed that you are already familiar with the functionality of the Base Module. If you have not yet set up the trial account, go to <http://www.3f-project-management.com/start/> to do so.

The Approval of Management module has the following additional functionalities (over the Base Module):

- You can assign a role to each login you have set up in the system.
- You can set up projects so that timesheets must be approved before the hours tracked are included in time reports.
- You can give resources access to specific projects.
- Tasks entered by users with a Project Members role must be approved by the Project Manager or any Enterprise Manager.
- You can enter tasks, but prevent time from being tracked on such tasks.
- You can decide on who can have access to a particular project.

This guide will direct you step-by-step and will show you what to do to take full advantage of the Approval Management module.

Getting Started

Step 1. Assign correct role to existing users

Click the Tree View > Administrative > Login Resources > Name of the login resource you want to edit
On the loaded page, choose the appropriate role from the role combo box.

Step 2. Edit existing projects

Click the Tree View > Projects > Name of Client > Project Name

2.1 On the loaded page, set the timesheet approval you want by clicking the radio button in the Time Sheet Approval section.

2.2 Choose the resource you want to function as a project manager. Only a resource with an Enterprise Manager or Project Manager role can act as a Project Manager.

Step 3. Assign resources to work on a project

Click the Tree View > Resources > Assign to Project > By Project or By Resource

By Project: Select the client and project, then check off the resources you want to assign to the project before clicking "Retrieve". When the page has reloaded, check the "Schedule Freely" across the resource you want to assign to the project. Un-checking "Schedule Freely" removes the resource from the project.

By Resource: Select the resource you want to assign to a project, then click the "Retrieve" button. When the page has reloaded, select the project; then click the "Add Project" button. Finally, check the "Schedule Freely" across the resource you want to assign to the project. Un-checking "Schedule Freely" removes the resource from the project.

Note: If you are using the Approval Management Module for the first time, then you will find that all resources set up in the system are assigned to all the projects. Resources added from now on must be assigned to a project. For new projects, resources are no longer automatically assigned.

Note: You will see a number of days listed on the right side of each resource. This allows you to enter the number of hours a resource can be planned on a project on a given day, that is, if you have the Gantt diagram and Planning module enabled.

Step 4. Timesheet and Task Approval

Click the Tree view > Projects > Name of Client > Project Name > Project Management > Approval Management

Note: When you access this page, it will most likely be empty because nobody has, as of yet, entered any timesheets or tasks for you to approve. When the first timesheet is submitted or the first task is entered, you will see those timesheets listed here pending approval. To approve a timesheet, click on a timesheet or task; the approval is done in the popup window.

Remember: Timesheets will only be listed here pending approval if you set the project to enable timesheet approval (which is taught in Step 2).

Note: A yellow icon next to the project name denotes that there is something that needs your attention.

Step 5. Edit a task to prevent time tracking

Click the Tree view > Projects > Name of Client > Project Name > Tasks

On the task page, click the task you want to prevent time tracking on. The task details open up in the new window. To prevent time tracking, uncheck the Allow Time Tracking checkbox in the top right corner.

Inform your coworkers

Now that you have a general idea of the new features added with the Approval Management module, inform you coworkers about the following:

- When a task has been entered, time tracking cannot be started before it has been approved and "Allow Time Tracking" has been checked.
- Depending on how you configure your project, the timesheet may need to be approved before the hours worked can be viewed in the Time Report.
- Depending on the role you assigned to a user, he or she may now have less access than before.

1902 Software Development Corporation

Unit 1906 Atlanta Centre
31, Annapolis Street
Greenhills San Juan
Metro Manila
Philippines
Phone: +63-2-726-6190
Fax: +63-2-726-6189
Email: sales@3f-project-management.com

www.3f-project-management.com

Copyright © 2003- 2006