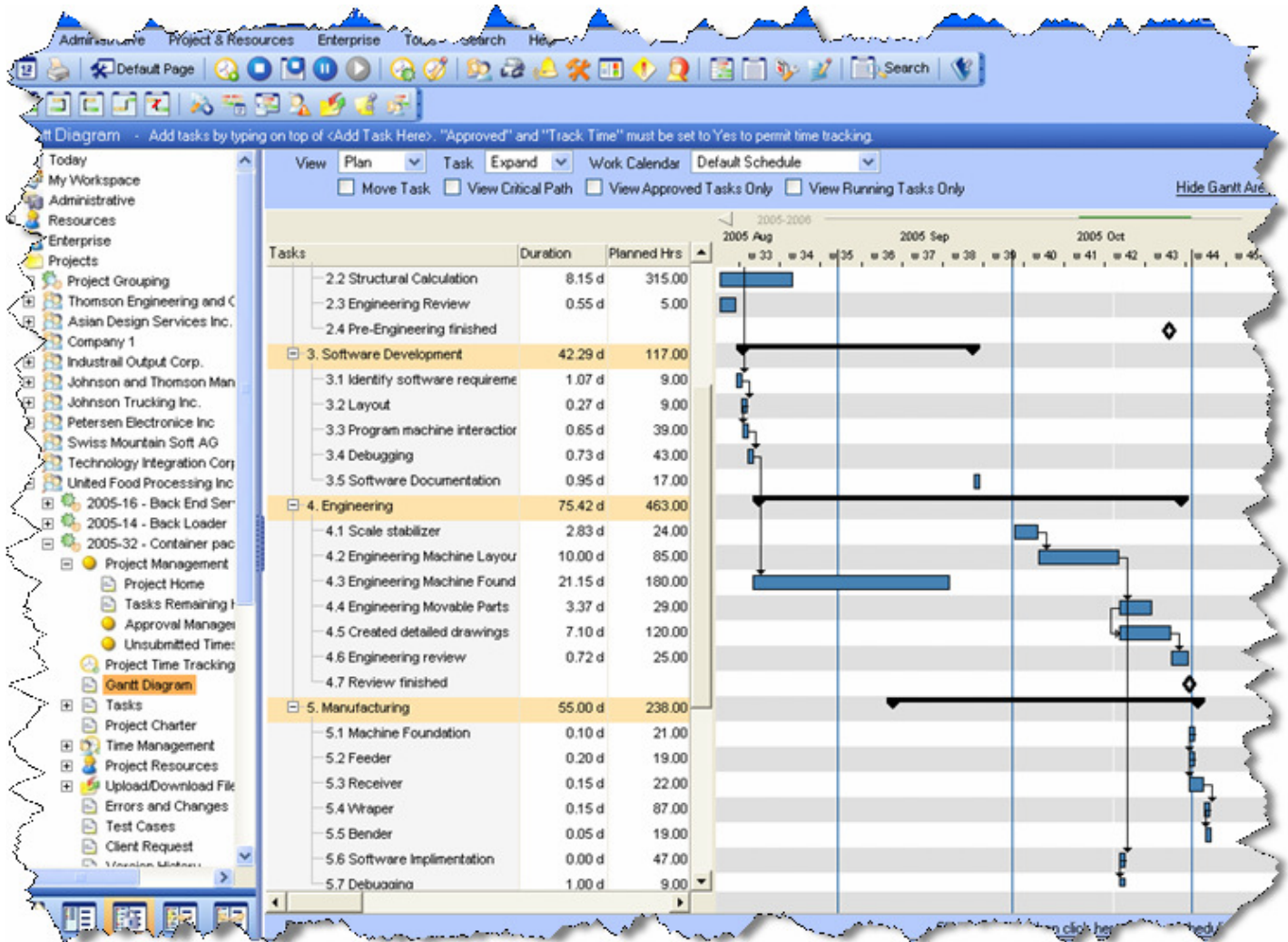


# 3f Software Planner 2006 Gantt diagram and Planning Module



**Project Management. Anytime. Anywhere.**

This guide will show you how to get started with the Gantt diagram and Planning 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 Gantt diagram and Planning module has the following additional functionalities (over the Base Module):

- You can specify a work calendar for each individual resource.
- You can plan the project graphically using a Gantt diagram.
- You can plan what individual resources should do on a given day.
- You can view daily, weekly and monthly plans.
- You can create enterprise resources.

## Getting Started

### Step 1. Work Calendar

Click the Tree View > Administrative > Work Calendar

To add a new calendar or edit an existing calendar, click the Add New icon on the loaded page.

### Step 2. Assign work calendar to a login resource

Click the Tree View > Resources > Login Resources > Name of the resource

On the subsequent page, you can choose a different work calendar or edit the one assigned to the resource. Any change you make will not affect any master calendar.

### Step 3. Plan using the Gantt diagram

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

Start entering a new task by clicking "Add Task Here". When you have entered the task name, click Enter on the keyboard. Navigate to the next column using the arrow on your key board. To activate a column for input, press the Enter key on the keyboard. We strongly suggest that you review the Help files for the Gantt diagram.

**Note:** Any task entered in the Gantt diagram is automatically available in the Task List.

### Step 4. Plan resources in the Gantt diagram

Assuming you are still in the Gantt diagram, click the task for which you want to create a resource. Next, click the link "Click on a task," then "Click here to open scheduling pane."

A scheduling pane will now open below the Gantt diagram listing all the resources working on the project. All the days covered by the task duration are listed across each login resource. Enter the number of hours you want to plan a resource for the on a given day.

**Note:** When you plan a resource on a task, the hours you plan are shown on the resource's Today page.

### Step 5. View work schedule - Enterprise Level

Click the Tree view > Enterprise > Work Schedule

On the page that loads, click the link "Click to view" across the resource, the work schedule of whom you want to see .

### Step 6. View work schedule - Project Level

Click the Tree view > Projects > Name of Client > Project Name > Project Reports > Work Schedule

On the page that loads, click the link "Click to view" across the resource, the work schedule of which you want to see.

### Step 7. Set up enterprise resources

Click the Tree View > Resources > Enterprise Resources

**Information:** An enterprise resource does not have a login to the system. Enterprise resources can be assigned to a project in the same fashion as a regular login resource. If you do not have the Approval Management module, all enterprise resources in the system are automatically assigned to any new project.

### Step 8. Setup project resources

Click the Tree View > Resources > Enterprise Resources

**Information:** A project resource does not have a login to the system and which can only be used within the project where it was added. If you do not have the Approval Management module, all project resources in the system are automatically assigned to any new project.

**Information about enterprise and project resources:** Enterprise and project resources are typically used when you want to schedule objects like cars, meeting rooms, equipment, etc for particular projects. They can also be used if you have third party consultants who work on projects from time to time. The system allows you to set up an unlimited number of enterprise or project resources as well as plan these resources in the Gantt diagram. You can enter actual time used for each resource which, if you do so, automatically appears into the time reports.

**Inform your coworkers**

Now that you have a general idea of the new features added with the Gantt diagram and Planning module, inform you coworkers about the following:

- Upon login, everybody should check the Today page to see if anything has been scheduled for them on a given day.

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