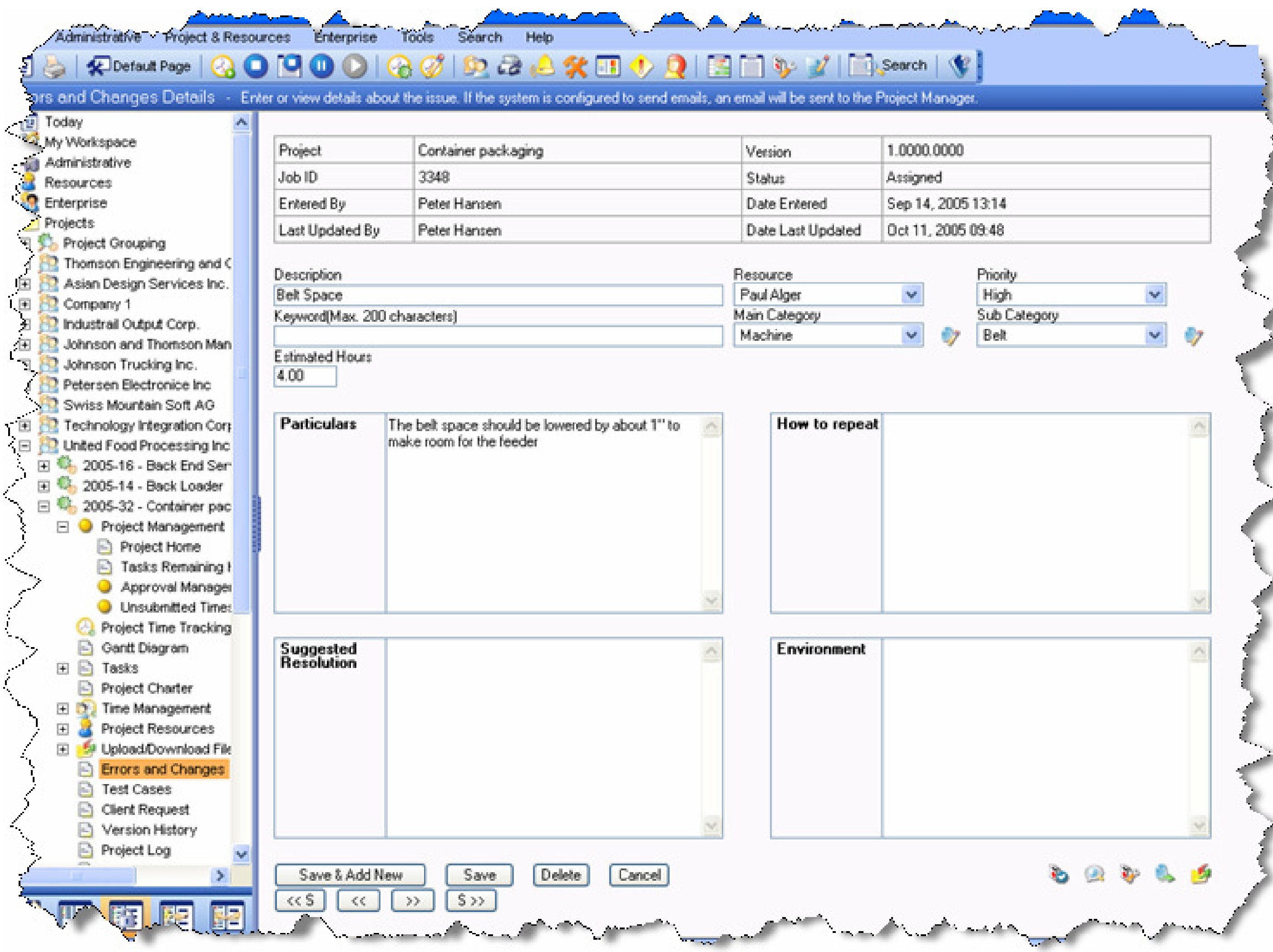
3f Software Planner 2006
Base Module Advanced Features



Project Management. Anytime. Anywhere.

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.

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 is being time-tracked. Upon stopping "Quick Time", you will be asked to assign a task to the accumulated time. Once time has been allocated, the 3f Software Planner can automatically resume time tracking on the task 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.

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.

Project Templates
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.

To create a template
File > Export > XML - Task List

To import a template
File > Import > XML - Task List

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.

Project Grouping

Project Grouping provides you with an overview of the number of hours that has gone into a group of projects, which are not otherwise related to each other. You can set up an unlimited number of project groups in which you can include an unlimited number of projects from any client. You can even include the same project in multiple project groups.

To create a Project Grouping
Click the Tree View > Projects > Project Grouping

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 the current version's look and feel. However, the general principles are the same.

Version History
Click the Tree View > Projects > Name of Client > Project Name > Project Reports > Version History
Software companies commonly use Version History. It tracks which tasks have been finished and which issues have been resolved in a particular version. To learn more about Version History, we suggest that you view our video tutorial:
http://www.3f-project-management.com/kb/video-tutorial/f2005/ADVFEA_25_UsingVersionHistory.html

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

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