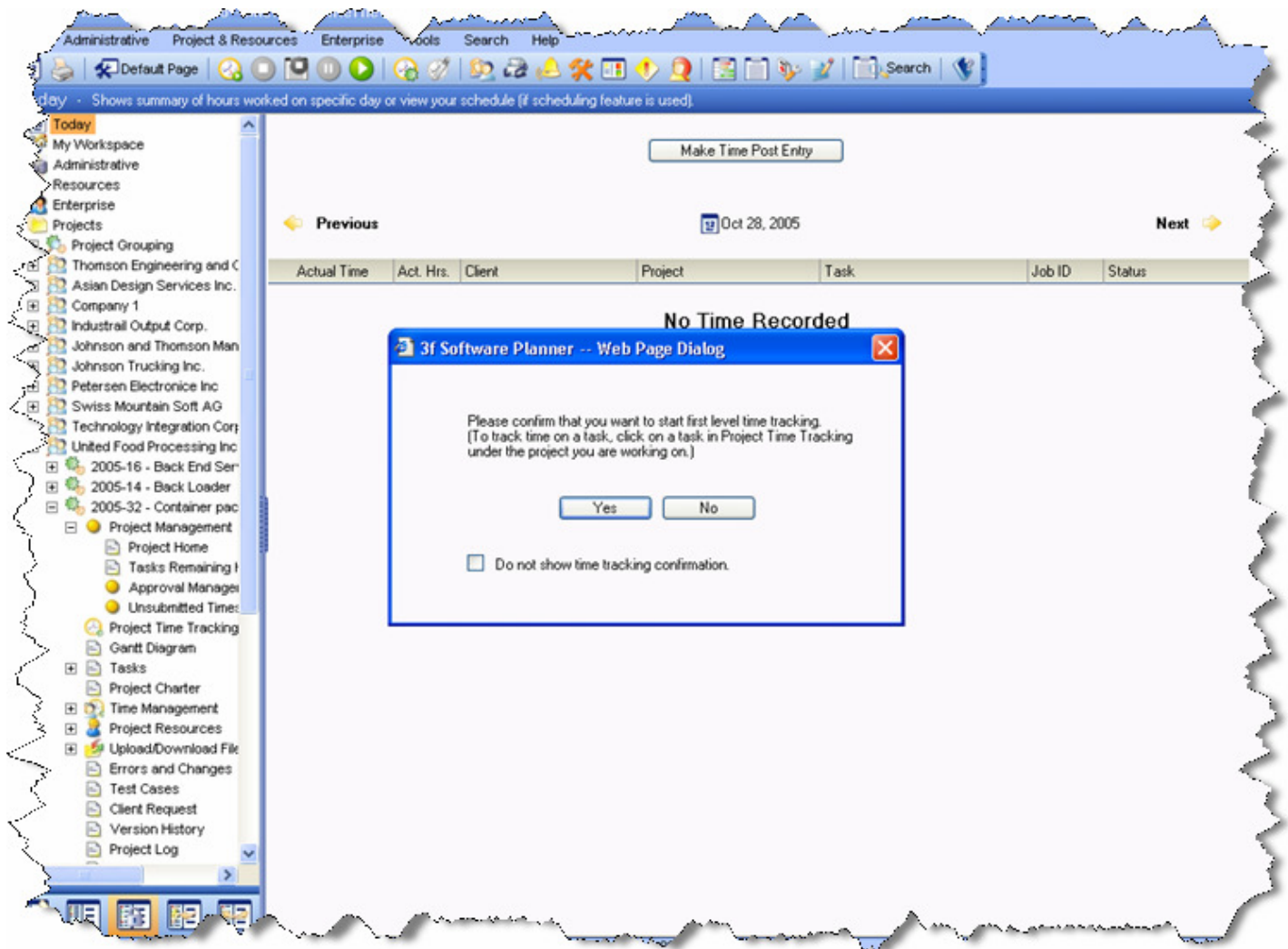


3f Software Planner 2006 Base Module Getting Started



Project Management. Anytime. Anywhere.

This Getting Started document will guide you through the working process of the 3f Software Planner Base Module, which takes less than an hour. Once you have gone through this paper, we strongly suggest that you take a look at the "Advanced Features" paper where more powerful advantages are described.

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. If you have not yet set up the trial account, go to <http://www.3f-project-management.com/start/> to do so.

CUSTOMIZING

Step 1. Enter employees

Click Projects & Resources > Login Resources

On the "Login Resources" page click "Add New"  and fill out the form.

Note: Set up a new Department by clicking Administration > Departments

Step 2. Enter clients

Click Projects & Resources > Client and Projects

On the "Client and Projects" page click "Add New"  and fill out the form.

Note: Set up a new Project Type by clicking Administration > Project Types

Step 3. Set up client project

Click Projects & Resources > Client and Projects

On the "Client and Projects" page, click "Add/View Projects" to the right of the specific client for whom you wish to set up a new project.

On the "Project List" page click "Add New"  and fill out the form.

Step 4. Add tasks to client project

Click the Tree View > Projects > Name of Client > Name of Project > (Optionally version number, if project is linked) > Tasks

On the "Task List" page click "Add New"  and fill out the form.

Note: Please disable your popup blocker for the server address.

Important: An unlimited number of persons may work on the same task at the same time. Therefore, enter hours for the team as a whole.

Step 5. Set Up System Defaults (Optional)

Click Administrative > System Defaults

Define your mail server for outgoing e-mails.

Define time tracking round off.

Upload images (e.g., your logo) to be used as header on printouts and in HTML e-mails.

TIME TRACKING

Step 6. 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 7. 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 8. 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 9. 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  which is found towards the right of the active task.

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


Step 10. 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 11. Stop daily time tracking (First and Second Level Time Tracking)

Click  to stop all time tracking.

Step 12. 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 timesheet 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 13. Tasks Remaining Hours

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 reports.

Note: To set a task to "Finished", enter 0 in the "Rem. Hrs." (Remaining Hours) field across the task.




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  button.

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

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