

PlanMill Work Schedules

User Guide

Version 1.0

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1. Getting started in PlanMill Work Schedules

Work Schedules are used for viewing the resource situation and availability of individual employees, as well as the assigned work load of each person or each project for a certain period of time. Work Schedules can also be used to edit the work load unevenly for periods of time (day, week, and month).

Work Schedules shows the load situation in green if no assignments with remaining work exist for a person on a given period. It also appears in red color if a person's available capacity (calculated from work calendars) is exceeded for example if the person assigned has too much work or is overbooked during that period.

Before planning resources with Work Schedules, check that you have valid information in the projects you are scheduling. This includes the following:

- Tasks or requests exist with valid deadlines
- Assignments (correct performers assigned to the task)
- All users assigned as performers have valid calendars for the planning period (otherwise Work Schedules will show 0 hours for the persons)

Work Schedules are a resource management tool for resource managers and project managers. Usually, team members do not have editing rights but it is generally recommended that everyone can see what work and how much work is scheduled for them for each period.

Work Schedules also show the absence situation, so it can be used for planning annual holidays, and so on.

Preliminary projects are visible in Work Schedules but not in the Time Sheet. This allows for resource planning for example for projects in sales stage or early budgeting stage. Users can select which projects' resource plans one wants to see (preliminary, execution or both).

2. Key functions of PlanMill Work Schedules

PlanMill Work Schedules allow specific actions for different types of users. Below is a description of the common functions for all users.

2.1 Entering work schedules and choosing correct scheduling accuracy

Start scheduling work from Project space (Works schedules filters automatically only that specific project to the scheduling window).

You can also go to Work Schedules from **My workspace** directly.

You can schedule in day, week or month mode. Choose the one best suited for your company needs and stick to that for the whole company (recommended).

Next, select the period from the calendar selection or other tools. Then, choose the portfolio, projects, person, team or other filtering with which you want to filter the resource situation.

2.2 Numbers in the Work Schedules (day/week/month)

If you have inserted planned or remaining values for the assignment from the Project space (Task, Assignment or Plan-tabs), the period boxes will show the remaining value divided to the whole period of the task. See example assigned to John Doe where the planned work schedule is 60 h and remaining time is 60 h (inserted from Task ----form):

Task/Assignment	Start	Finish	Planned	Accepted	Remain
Task 1/Doe, John	2.2.2009	29.5.2009	60 h	0	60 h
Task 2/Martin, Steve	2.2.2009	29.5.2009	0	0	0

Figure 1 Numbers in the Work Schedules (day/week/month) cells

Example: With the person called John Doe, his screen looks initially like this in Work Schedules (Month –mode):

Task/Assignment	February	March	April	May	Scheduled	Assignment
Task 1/ Doe, John 2.2.2009 – 29.5.2009	15 h	15 h	15 h	15 h	0 h	Planned: 60 h Actual: 0 h Remain: 60 h

The 60 hours that was planned and remaining time is divided to 4 months, giving every month 15 days. Scheduled 0 h means that noone has yet edited the scheduling manually from the Work Schedules and this is an even breakdown of the work.

Notes: In reality, the figures would be a little bit different because of national holidays (like Easter and Labor Day) in the user's calendars and these months would have fewer work days.

Planned and Remain times will show the same amounts before any actual hours have been reported.

Planned and Remain will also be updated to Project space -> Task - and Assignments -tabs, Time sheet and reports.

2.3 Changing the scheduled work amounts

If the project manager thinks it is best if the work is not scheduled evenly, and decides to change the scheduling manually. After manual editing Work Schedules will look like this:

Task/Assignment	February	March	April	May	Scheduled
Task 1/ Doe, John 1.2.2009 – 31.5.2009	20 h	10 h	10 h	20 h	60 h

The screenshot shows the 'Work schedules' interface. At the top, there are navigation tabs for CRM, Projects, HRM, Administration, and Products. Below this is a filter bar with options for 'View by', 'Order by', 'Project status', 'Person', 'Team', 'Competence', 'Customer', 'Portfolio', and 'Project'. The main area is a calendar grid for the year 2009, with columns for each month. Two tasks are listed: 'Task 1' for 'Doe, John' and 'Task 2' for 'Martin, Steve'. Task 1 has 20 hours scheduled in February, 10 in March, 10 in April, and 20 in May, totaling 60 hours. Task 2 has 0 hours scheduled in all months, totaling 0 hours. The 'Scheduled' column on the right shows the total for each task.

Person	Project	Task	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Scheduled	Assigned
<input type="checkbox"/>	Doe, John	Task 1	0,00 h	20,00 h	10,00 h	10,00 h	20,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	60,00 h	Planned: 60,00 h Actual: 0,00 h Remain: 60,00 h
<input type="checkbox"/>	Martin, Steve	Task 2	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	0,00 h	Planned: 0,00 h Actual: 0,00 h Remain: 0,00 h

Figure 2 Changing the scheduled work amounts in Work Schedules

Scheduled work amounts are changed to 60 hours because the user has manually changed the scheduling. Planned and remaining amounts for the assignment are also still 60 hours, because the amount has not changed and the same amount was scheduled.

Note: Release 12.1 shows the scheduled amount change in real-time even before saving changes. This lets the user see if there is a difference between the project plan or the prior scheduling and the scheduling he is doing right now.

3. Options in Rel 12.1 using planned and remaining values

These parameter-driven features can be activated by contacting PlanMill support. They will enable the features and affect the whole instances.

3.1 Option A: Scheduling from “empty table”

If manual scheduling is started (user enters a value in one of the period cells), all of the values divided to the other cells automatically will be removed and the user can start the scheduling from an “empty table”.

Example of an assignment where the planned 60 h has been given in the Project space

Task/Performers:

Task/Assignment	February	March	April	May	Scheduled	Assignment
Task 1/ Doe, John 1.2.2009 – 31.5.2009	15 h	15 h	15 h	15 h	0 h	Planned: 60 h Actual: 0 h Remain: 60 h

When “empty table” mode is activated, entering a manually scheduled value to a period cell (for example 50 h to April) will cause all the other period cells in that assignment to become 0 h. This can help manual scheduling with very long tasks and especially for continuous services with uneven resource load.

See the table below for a case when the month of April was edited with 50 h. The automatically divided remain times were instantly emptied from other months to help manual uneven scheduling. After that, the user can enter amounts for some of the months or other periods and he doesn't have to manually empty those cells, which are not manually scheduled.

Task/Assignment	February	March	April	May	Scheduled	Assignment
Task 1/ Doe, John 1.2.2009 – 31.5.2009	0 h	0 h	50 h	0 h	0 h	Planned: 60 h Actual: 0 h Remain: 60 h

3.2 Option B: Scheduling more than tasks/assignments remaining amount causes error message

The user cannot exceed the assignments' remaining amount when scheduling in Work Schedules, otherwise the user receives an error message. For example, when John Doe has 60 hours remaining in the Task1 –assignment and someone tries to schedule 20+10+10+50 = 90 hours, an error message is given and no changes are saved.

4. Quick guide scenarios in PlanMill Work Schedules

4.1 Scheduling and planning only from Work Schedules

In some cases, such as continuous services with resourcing needs in only a few periods of the year, it is more convenient to assign performers with 0 hours planned and remaining in the Project space. Scheduling is done directly from Work Schedules.

An example with Steve Martin looks like this initially in Work Schedules, because planned and remain are both 0 hours:

Task/Assignment	February	March	April	May	Scheduled	Assignment
Task 1/ Martin, Steve 1.2.2009 – 31.5.2009	0	0	0	0	0 h	Planned: 0 h Actual: 0 h Remain: 0 h

Editing the values will also change the assignment planned and remain –values (also in Project space). After actual has become > 0 h, only remain is changed from manual scheduling. Actual means the amount of accepted time reports saved to this particular assignment.

After scheduling manually, the assignment will look like this:

The screenshot shows the 'Project space of 'Work schedules demo -project (12777)'' interface. It features a navigation bar with tabs for Overview, Tasks, Assignments, Plan, Team, and Revenues. Below the navigation bar, there are filters for View by, Type, Status, Billing type, Team, Parent, Baseline, and Interval. A search view field is also present. The main table displays task assignments with the following data:

Task	Planned	Reported	Accepted	Remain	Forecast	Performer(s)
Work schedules demo -project (2)	90,00 h	0,00 h	0,00 h	90,00 h	90,00 h	
Task 1 (edit)	60,00 h	0,00 h	0,00 h	60,00 h	60,00 h	Doe, John
Task 2 (edit)	30,00 h	0,00 h	0,00 h	30,00 h	30,00 h	Martin, Steve

Figure 3 Assignment view in Work Schedules after scheduling manually

4.2 Editing remaining amount or start/ finish dates of task/ assignment

Changing remaining amount or deadlines of a task/assignment from Project space Task or Assignment tabs causes the manual scheduling to be “out of sync” with the new values.

If assignments have been scheduled for the task you are editing in the task form the task form will ask user if manual scheduling is going to be removed or not when editing remaining amounts or start and finish dates.

If user answers “yes” the new remaining amounts will be divided evenly across all periods of the assignment.

If user answers “no” the manual scheduling will be kept intact (for example like in the table below), but the Remain –value will be different.

When the start or finish dates are edited all scheduling outside the task’s new start and finish dates will be deleted.

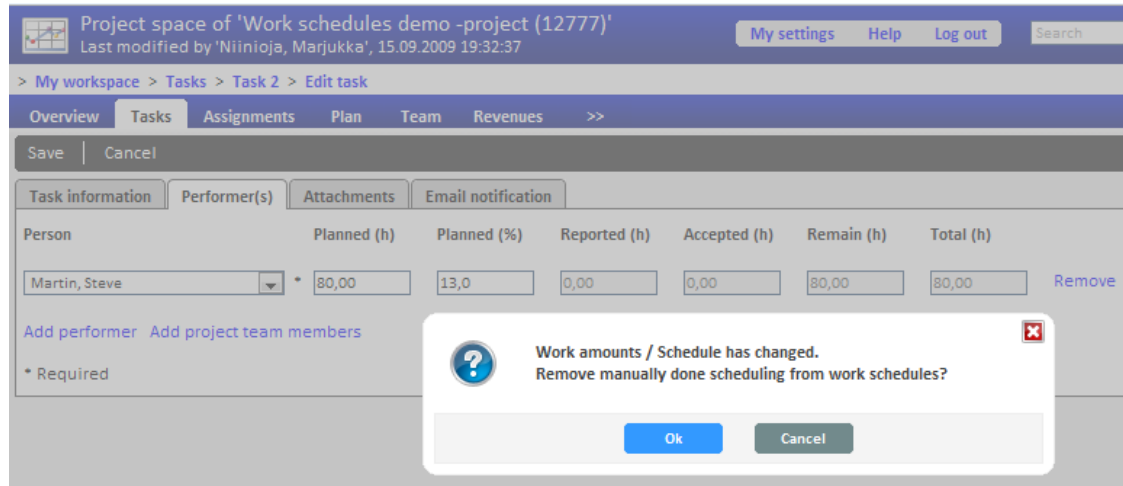


Figure 4 Picture from Project space task-form after changing the assignments amounts

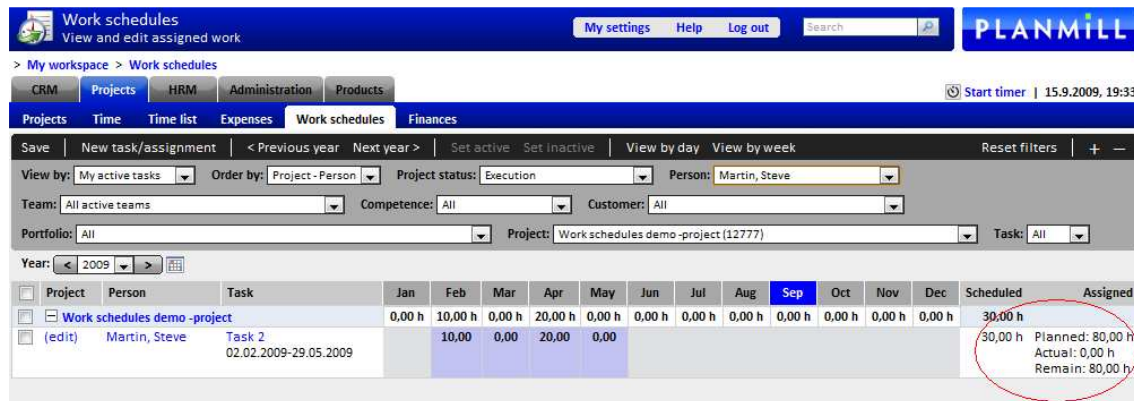


Figure 5 Red circled values show that amounts have been changed also in Work Schedules

Red circled values show that amounts have been changed also in Work Schedules by answering “Cancel” in the Task form but the scheduled amounts show still 10+20=30 hours, not 80 hours. This can be edited by entering new values to each month cell. Answering “OK” would have changed the values to 20+20+20+20 = 80 h.

After time reports have been saved and accepted for the assignment the Work Schedules will show the actual amount + remaining scheduling for all manually scheduled assignments. The user interface will show the cells as “locked”

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Time sheet, Week 6, 02.02.2009 - 08.02.2009 My settings

> My workspace > Time sheet

CRM Projects HRM Administration Products

Projects Time Time list Expenses Work schedules Finances

Save | Delete selected | Set active | Set inactive | Set ready | Lock week | Unlock week

View by: My active tasks | Person: Doe, John | Account: All

Billing type: All | Days: 7

Week: < 6 2009 > | 1 new tasks (★) | Balance: -1335,00 h (01.01.2009 - 15.09.2009)

Task	Deadline	Mon 2	Tue 3	Wed 4	Thu 5	Fri 6
+ BillionMill/PlanMill Project Deployment (12639)						
- Work schedules demo -project (12777)						
Task 1 ★	29.05.2009		5,00			

Legend: Task late Accepted Preliminary Multiple times

3 (3)	Total:	0,00 h	5,00 h	0,00 h	0,00 h	0,00 h
	Billable:					
	Non-billable:					

1 Add new time report Delete

Reported: 5,00 | Comment: Creating time reports for demo

Overtime: | Overtime comment:

Travel time: |

Figure 6 Work Schedules show the actual amount + remaining scheduling for all manually scheduled assignments

Glossary

Absence type	By default, the absence type includes: <i>Annual holiday, Sick leave, Sick leave due to child, Maternal leave, Paternal leave, Military leave, Unpaid holiday, Paid holiday, Overtime leave, Balance leave, Bonus holiday pay, Military refresher, Layoff, and Child care leave.</i>
Accepted time reports	Time reports that have been approved by Acceptor and lists the reported time for the request.
Assignment	For each performer, an assignment is created after a request or requirement attached to a certain project as a task is given to one or more performers.
Accounts	Each contact belongs to an account. All the users are also shown on the contacts tab. Contacts can be linked to actions, requests, campaigns, and so on. Accounts are typically companies that are potential customers (prospects) or existing customers.
Annual holiday	Refers to the holiday calculation according to Finnish annual holiday law (implemented by default).
Balance	Refers to the remaining time measured in hours after the time reports are calculated.
Contacts	Store information about your partners, affiliates, suppliers, and other relevant details. Enjoy quick access to all critical account data, including a company overview, key sales data, relevant documents, partners involved in the account, and more.
Document Library	Integrated and simple way to store customer related materials and documents. All PlanMill activities are by default shared with colleagues. Notify by email from any activity if you want instant reaction.
Import specification	Description and details of Accounts, Contacts, Actions and Opportunities parameters.
Power User	Refers to person(s) with corresponding access rights as a power user, and can for example view all absences and accept interruptions in absence request. Power User also refers to the system roles of a person with corresponding access rights to the PlanMill system as a whole.
Project	Refers to specific tasks assigned to one or more performers as an assignment. A request has to be related to a project. Project requests are also related to contacts /partners. Time can be reported for each project and can be entered by the performer(s) after each request. A competence is bound to a billable request is based on a project's price list. Each project contains different price types.

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- Request** A request is a wish or requirement attached to a certain project as a task and optionally to one or more performers. For each performer, an assignment is created. A request can be related to contacts, projects requests and partners. Time can be reported for the requests by the performers.
- Time reporting** Refers to vacations, leaves, or any types of time reporting by a person or employee working in a company or organisation. The finish date (and optional time) of time reporting is entered in the Time reporting field.
- Task** A task is attached to a certain project assigned to one or more performers.
- Time sheet** Allows users to report time for 7, 14 or 21 days at a time. Time sheet looks like a grid with tasks as rows and days as columns. Time is reported as hours (0,5 h = 30 min) or optionally with start and finish times (9:00 to 11:00) to each cell. **Normal time, Overtime** and **Travel time** are supported in Time sheet.
- Users** Persons or employees in the company listed in the HR database, which for example, can perform general actions within the PlanMill system.
- Work Schedules** Used commonly by the **Resource & Project Manager** for tracking tasks, requests and their deadlines and shows assignments and performers assigned to the tasks. In PlanMill Time Reporting, this is useful for checking current resources for the company during multiple projects.
- Workspace** Also called **My Workspace**, this is the PlanMill dashboard where users can customize screen layouts from different readymade options and can add frames, gadgets, and widgets.