

PlanMill Calendar

User Guide

Version 1.0

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1. PlanMill Calendar for Collaboration

PlanMill Calendar is a free web-based solution to all PlanMill Cloud and On-Premise customers. It can be used for viewing various kinds of calendar events such as **absences, actions, annual holidays, opportunities, requests, project milestones** and **tasks**. Separate activation requests from Cloud Customers are required.

We have grouped all the existing features needed for group working and collaboration under one **'Group'** tab in the user interface where these features can be found more easily.

1.2 Why use PlanMill Calendar?

Calendar in PlanMill is straightforward and easy to use. The essential user interfaces to calendar management is similar with all functions found in the PlanMill systems. The Calendar feature tracks all accounts, requests, actions and other activities within your organization.

The Calendar module is a visual tool that shows PlanMill-timed entities as calendar events. From events, the user has direct access to the summary page of the entity in question. Calendar module also includes a filter method to allow inspection of the different calendar events more efficiently.

Calendar can be opened by selecting the **'Calendar'** tab, which in multitab environment resides under **'Collaboration'**. The module can also be found in the Project space, thus providing the same features with fixed Project space related filters.

1.3 User interface

The user interface consists of two parts: the *filter* and the *calendar view*.

The calendar view includes the buttons for navigation through different views. In the upper right corner, select whether you would like to see the **Month, Week, or Day view**. In the upper left corner you can navigate backward and forward (*month, week or day* depending on the view selection). Also, you can view Today's calendar events.

The filter includes check boxes for different PlanMill entities (**Annual holiday, Actions, Requests, Opportunities, Tasks, Milestones** and **Absences**) for selection of whether they are visible or not. In the tool bar, choose if you want to **select** or **unselect** them all at the same time. There are also drop-down selections for the more detailed filtering of calendar events.

*Note! If your calendar does not show anything, it might be due to excess filtering or due to session time-out. To check if the session has timed-out, click on **Calendar** tab (or refresh the web-page) and wait for the respond from the system.*

1.4 Viewing the Calendar

You can view your calendar from **My Workspace** under the new **Collaboration** tab. Click Calendar to show the three basic tasks: **Create new item, Select all, and Unselect all**.

By clicking on the event link, the pop-up information about the specific event appears. Calendar events are clickable elements; click to see the summary page of the event in question.

1.5 Managing the Calendar

Use the Calendar to know what everyone has scheduled for any given date and time. The Calendar module offers a daily, weekly or monthly view of all the items in PlanMill which can be scheduled. View your own **actions, your team, or company's actions, absences, tasks, milestones, requests and opportunities** in a calendar view.

This feature is available to all PlanMill users, but it needs to be activated to each role by sending a request to **Power users**. Users will see only those items in the calendar, which they already have access rights to see elsewhere in the user interface.

1.6 Creating new items

From **Create new**, start or enter into the calendar any of the following new items:

- New action
- New expense
- New calendar
- New team
- New product
- New account
- New opportunity
- New project
- New competence
- New absence
- New product group
- New campaign
- New request
- New portfolio
- New user
- New contact

1.7 Selecting all

Selecting all allows you to select and view all the items at one glance. You can also choose the **Month, Week, and Day** views.

1.8 Unselecting all

Unselecting all shows the empty calendar where you can also choose the **Month, Week, and Day** views.

1.9 Hiding filters

Hiding filters allows you to view the calendars without filters.

1.10 Resetting filters

Resetting filters allows you to reset the calendar filters. The following are filters in the Calendar: **Annual holiday, Actions, Requests, Opportunities, Tasks, Milestones, and Absences**.

2. Glossary

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.
Calendar	PlanMill Calendar component is a visual tool that shows PlanMill timed entities as calendar events. This includes a filter method to allow inspection of the different calendar events more efficiently. The filter includes check boxes for different PlanMill entities (Annual holiday, Actions, Requests, Opportunities, Tasks, Milestones and Absences) for selection of whether they are visible or not.
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.
Collaboration	All the existing features needed for group working and collaboration is under one group tab in the user interface, where features such as Calendar , Contracts , Products , and Forums , can be found.
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 and partners. Time can be reported for each project and can be entered by the performer(s) after each request. A competence bound to a billable request is based on a project's price list. Each project contains different price types.
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.
Task	A task is attached to a certain project assigned to one or more performers.
Task management	Manage unlimited tasks and subtasks including start/finish dates, dependencies, billing type, duty type, status and percentage of completion, summary and attachments. Multiple assignments (persons and teams) on tasks. Additionally, every team member assigned to a task can update the time spent working on the task. Planned/Actual/Remain/Forecast comparisons.
Users	Refers to all the persons or employees in the company listed in the HR database, which for example, can report time using Time sheet or Timer.
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.
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.
Users	Refers to all the persons or employees in the company listed in the HR database, which for example, can perform general actions within the PlanMill Absence system.