FRM Solutions, LLC

Managing a Project in Franchisee Gateway

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Introduction

Project Planner is a project management tool which allows you to interact with your franchisor on a range of projects through task lists and Gantt charts.

Projects, referred to as checklists, are associated with your location or locations, and each location can have many checklists active at one time. Corporate users manage checklists from within FRM, while franchisees manage their tasks by logging into the Franchisee Gateway. This user guide focuses on using Project Planner inside the Franchisee Gateway.

Note: This guide outlines steps for using the standard FRM Franchisee Gateway. Your gateway is custom to your brand and may look different than the pictures provided here. Also, your franchisor may have certain notifications or settings which are not outlined here. Please contact your franchise support team for clarifications on your brand's specific configuration.

How to Use Project Planner

1. Logging In to Franchisee Gateway

Your franchisor will provide you with a username and password via email to log in to the Franchisee Gateway, along with a link to the gateway. It will be specific to your brand and look similar to this:

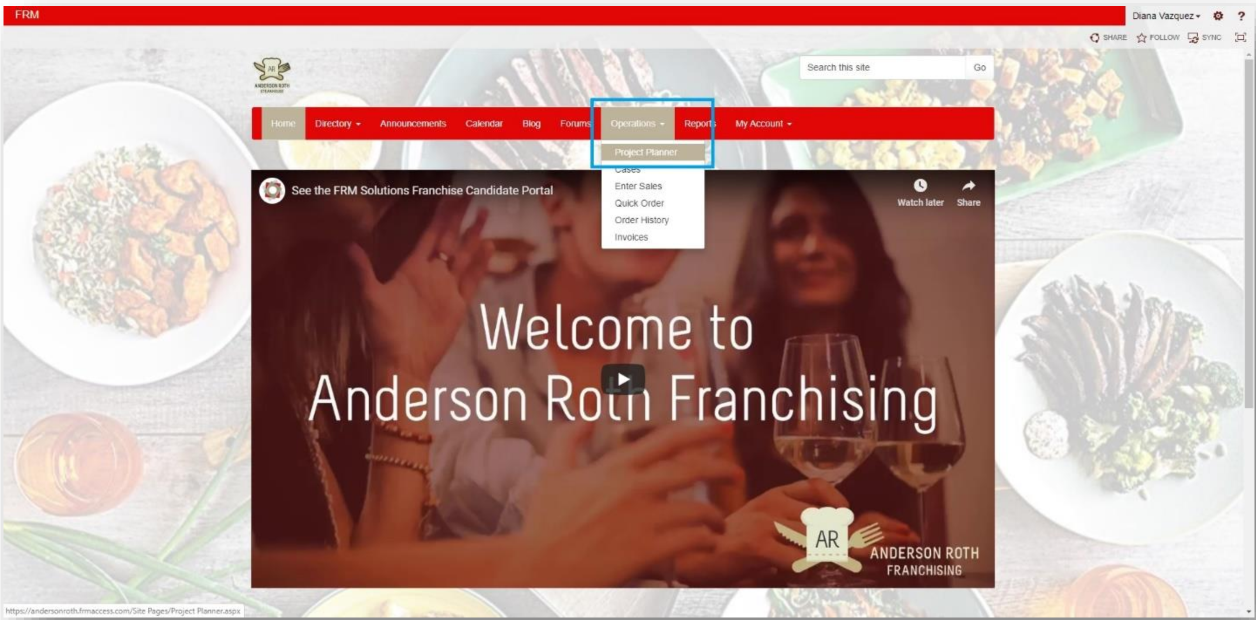
https://xyzcompany.frmaccess.com

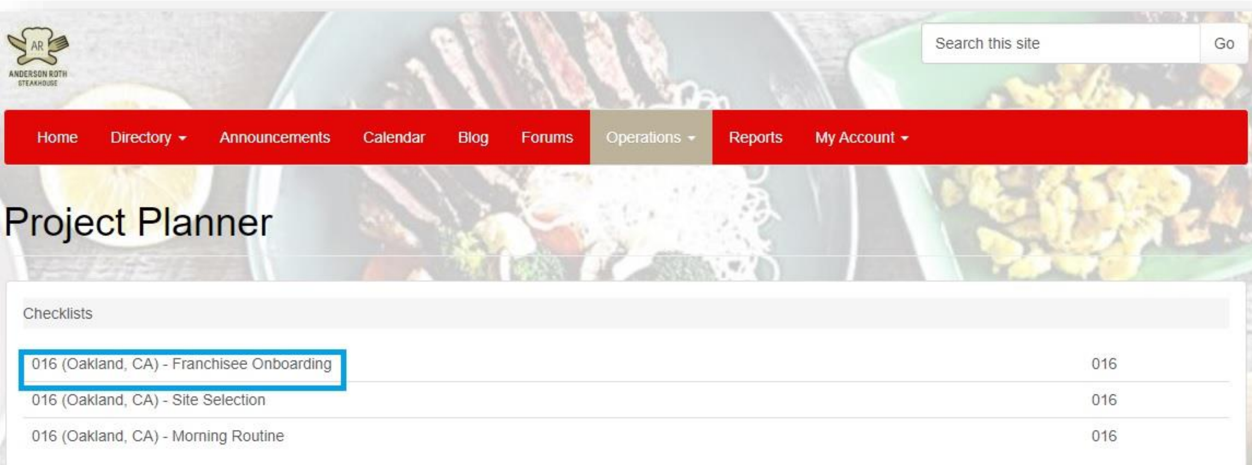
If you have trouble logging in to the gateway or wish to reset your password, contact your franchise support team.

2. Accessing Project Planner

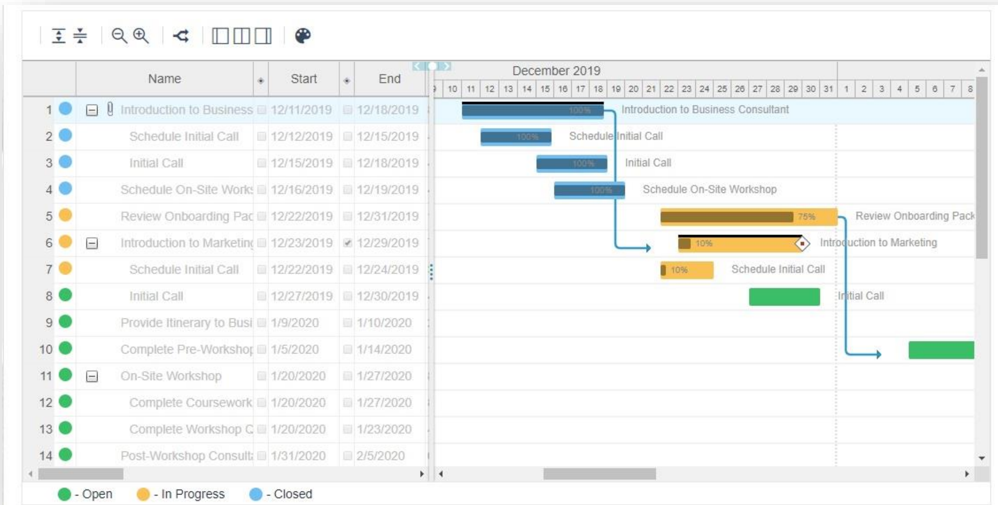
Once you have logged in, access the Operations or Project Management tab at the top of your screen. Again, this may be located in a different menu depending on configuration. To begin managing your projects:

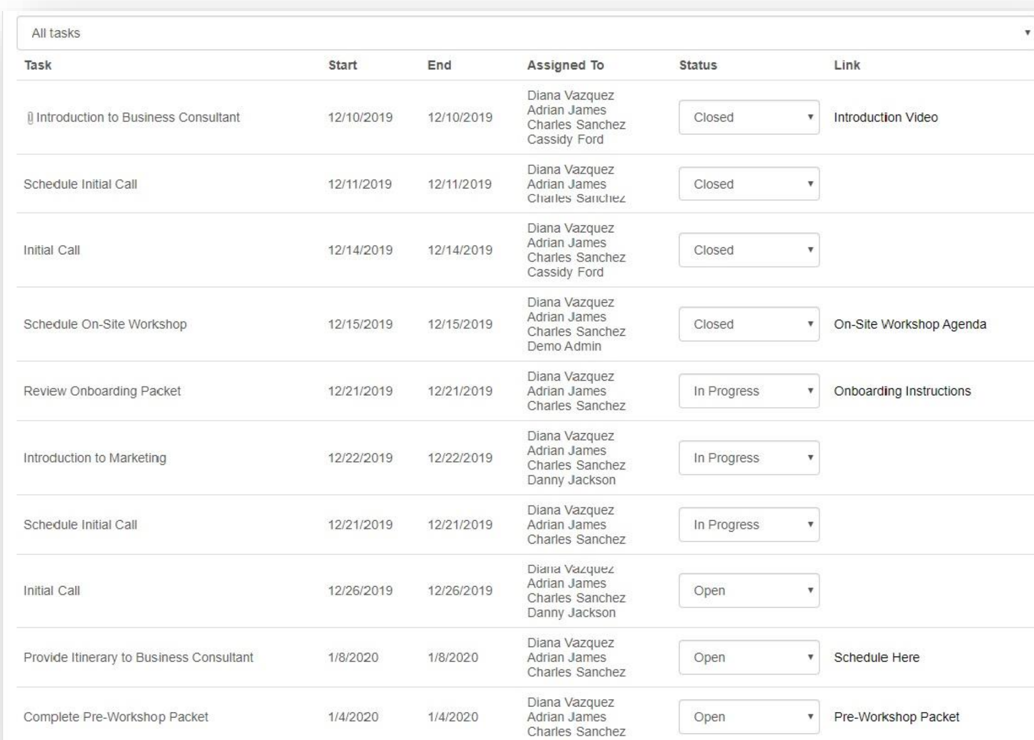
Click Project Planner under the Operations or Project Management tab, and find your list of checklists. Both closed and open checklists will appear in the lists of projects.





a. Click on the checklist you wish to manage. There are two main elements of your project: the Gantt chart and the task list. Depending on configuration, the Gantt chart may not be visible.

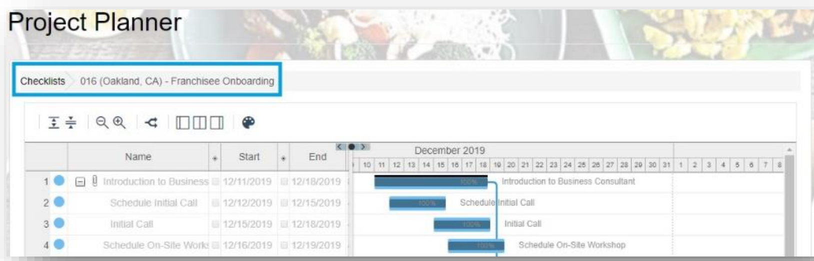




All tasks

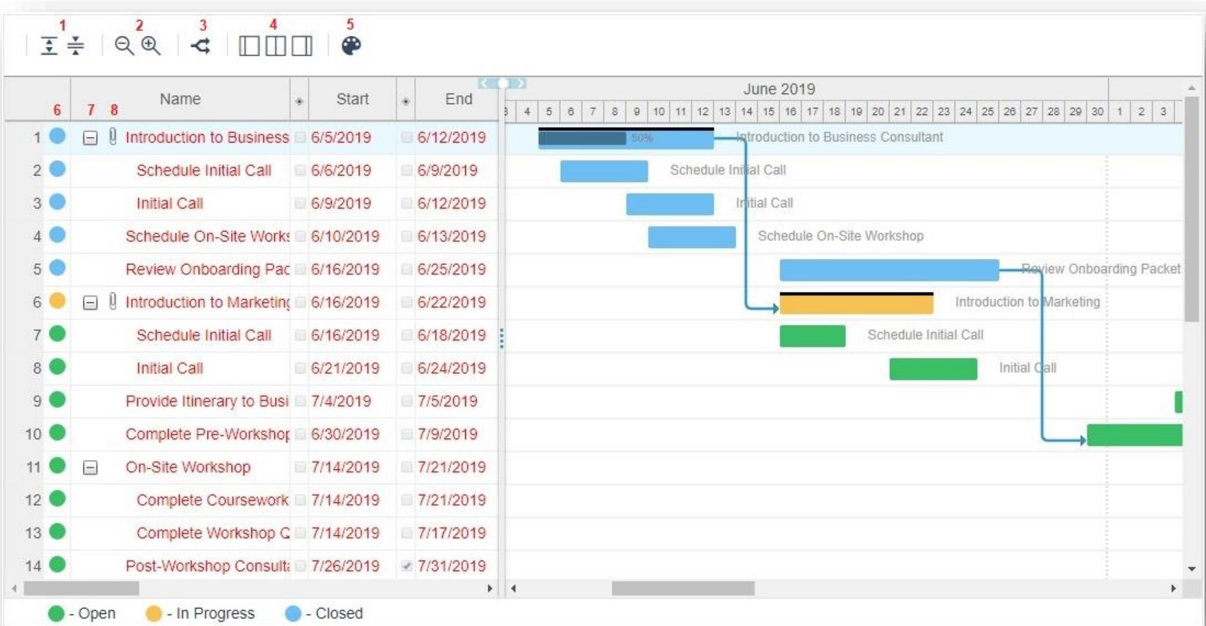
Task	Start	End	Assigned To	Status	Link
Introduction to Business Consultant	12/10/2019	12/10/2019	Diana Vazquez Adrian James Charles Sanchez Cassidy Ford	Closed	Introduction Video
Schedule Initial Call	12/11/2019	12/11/2019	Diana Vazquez Adrian James Charles Sanchez	Closed	
Initial Call	12/14/2019	12/14/2019	Diana Vazquez Adrian James Charles Sanchez Cassidy Ford	Closed	
Schedule On-Site Workshop	12/15/2019	12/15/2019	Diana Vazquez Adrian James Charles Sanchez Demo Admin	Closed	On-Site Workshop Agenda
Review Onboarding Packet	12/21/2019	12/21/2019	Diana Vazquez Adrian James Charles Sanchez	In Progress	Onboarding Instructions
Introduction to Marketing	12/22/2019	12/22/2019	Diana Vazquez Adrian James Charles Sanchez Danny Jackson	In Progress	
Schedule Initial Call	12/21/2019	12/21/2019	Diana Vazquez Adrian James Charles Sanchez	In Progress	
Initial Call	12/26/2019	12/26/2019	Diana Vazquez Adrian James Charles Sanchez Danny Jackson	Open	
Provide Itinerary to Business Consultant	1/8/2020	1/8/2020	Diana Vazquez Adrian James Charles Sanchez	Open	Schedule Here
Complete Pre-Workshop Packet	1/4/2020	1/4/2020	Diana Vazquez Adrian James Charles Sanchez	Open	Pre-Workshop Packet

Tips: Use the navigation buttons, rather than the back button in your browser, to maneuver around the Franchisee Gateway.



3. Using the Gantt Chart

The Gantt Chart is read-only and shows a high-level overview of the project, including the timeline, dependencies, percentage complete and more. Please reference the key on the following page and the Glossary in this guide for an explanation of icons and terms.



1 Collapse or expand all tasks containing subtasks

2 Zoom in or out of Gantt chart

3 Identify critical path
4 Change view: task list only, split screen or Gantt chart only
5 Show or hide Gantt chart colors
6 Task status
7 Collapse or expand individual tasks containing subtasks
8 Indicates notes are associated with a task

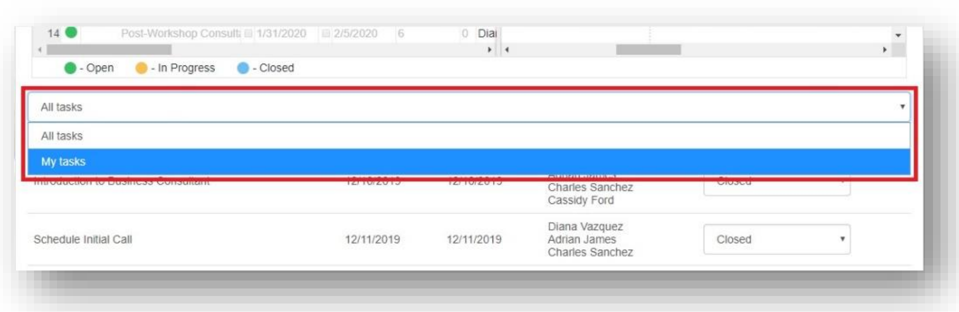
This view shows a detailed task list on the left. On the right is the chart, or visual timeline of the project.

a. Percentage complete shows up as a shaded bar on a task in the Gantt chart
b. Arrows indicate task dependencies
c. A solid bar at the top of a task in the Gantt chart identifies main tasks
d. A diamond shape represents a project milestone
e. Certain projects may exclude weekends. In this case, weekend dates will be grayed in the day tracking bar in month-view

4. Using the Task List

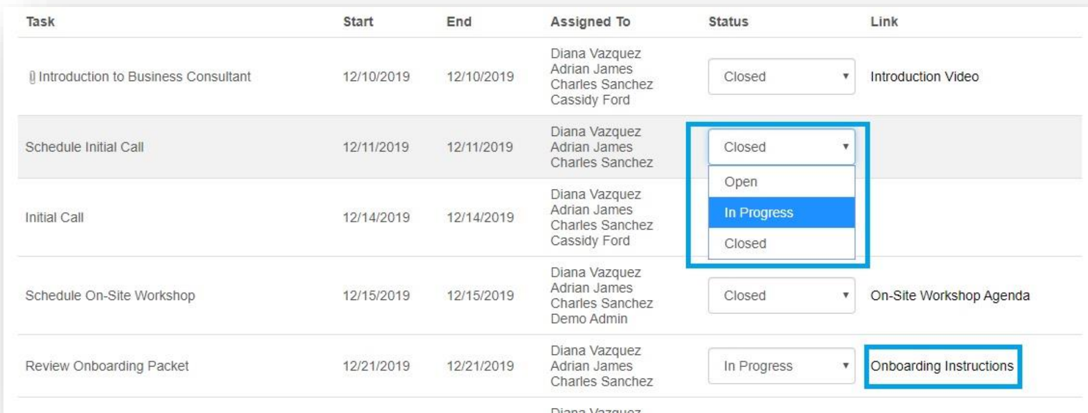
Your action items can be updated or completed in the main Task List below the Gantt Chart. Depending on the project settings set by your franchisor, you may see all tasks associated with the checklist, or only certain tasks. Tasks not assigned to you are read-only.

Tip: For longer checklists, use the drop-down menu to filter the list to show only the tasks assigned to you.

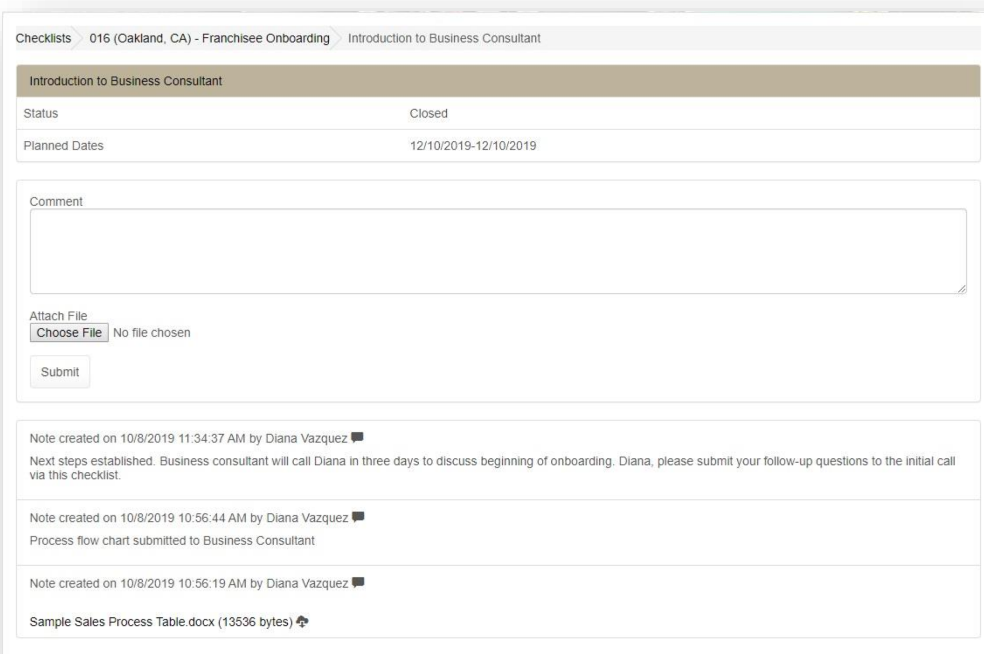


Notice the main Task List is a streamlined summary of the detailed view in the Gantt chart. Here you can:

a. Access resources provided by your franchisor in the Link section on the right
b. Mark tasks as open, closed or in progress in the drop-down menu



On the left are the individual task names. Click on a task to view more detailed information:



a. Observe task status and planned dates at the top of the pane.
b. Submit notes regarding the task in the Comment section. You can also submit photos or other files. Likewise, your franchisor can post comments and provide attachments for you to see. Notes and attachments will be logged in a read-only feed below the Comment section.

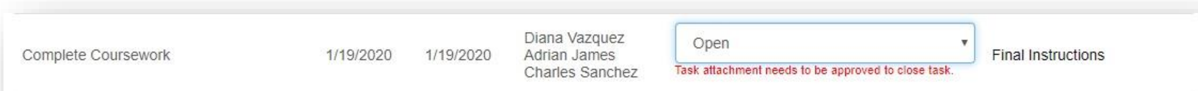
Tip: To submit multiple photos, documents or large files, upload a .zip file up to 128 MB in size.

c. You will be able to access the notes and attachments even after a checklist has been completed and closed.

5. Notifications and Communication

Your franchisor will have a unique way of communicating with you about your tasks and checklists. This may include automated emails for upcoming or past due action items.

Certain items may require the submission of an attachment which must be approved by a franchisor before you can close a task and move to the next one. You'll receive a notice if you try to close a task before approval is granted.



You'll receive a similar message when trying to close a task which is dependent on another task, if the first task has not yet been marked complete.

Glossary

Assignee	Selected in the process of applying a checklist. This is the person or persons responsible for a particular task.
Baseline End	The baseline end date is established when a checklist is created. It does not change, allowing you to always see the original, projected completion date of a task.
Baseline Start	The baseline start date is established when a checklist is created. It does not change, allowing you to always see the original, projected start date of a task.
Checklist	A location-specific “project.” It consists of a list of tasks and the important details associated with each item, such as start and end dates and who is responsible for the task. The checklist consists of two parts, the task list and the Gantt chart.
Critical Path	Identifies tasks which determine the shortest path to project completion. Shifting these tasks will directly impact your timeline.
Dependencies	Certain tasks can be identified as dependent on others. Adjusting dates on one task will change the date on the reliant task and initial tasks must be completed before dependent ones start.
Duration	The number of days a task should take to complete.
End	The end date is established when a checklist is created. The dates in this column can be adjusted by the franchisor and indicate the actual end date of a task.

Exclude Weekends	Project timelines may be based on a full week or a business week. When excluding weekends, task dates are still determined by task duration.
Gantt Chart	Shows a read-only view of the project in visual form.
Link	Certain projects may contain links to additional resources pertinent to an individual task.
Milestone	Key moments which represent overall project goals. Milestones can be marked as "start" or "end." End milestones limit your ability to move previous tasks forward in time.
Start	The start date is established when a checklist is created. The dates in this column can be adjusted by the franchisor and indicate the actual start date of a task.
Subtask	Some projects may be designed in phases or may require execution of multiple steps to complete a single task. Subtasks are subordinate to tasks and must be marked closed before the parent task can be completed.
Task	Specific action items that need to be accomplished to complete a project.