FRM Solutions, LLC

Project Planner: How to Get Started

Updated 11/08/19

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Introduction

Project Planner is the FRM project management tool, integrated into both Franchise Information Manager (FIM) and your externally facing Franchisee Gateway. Project Planner enables you to manage any kind of project through task lists and Gantt charts. This can range from store opening and remediation, to training and grand openings—and everything in between.

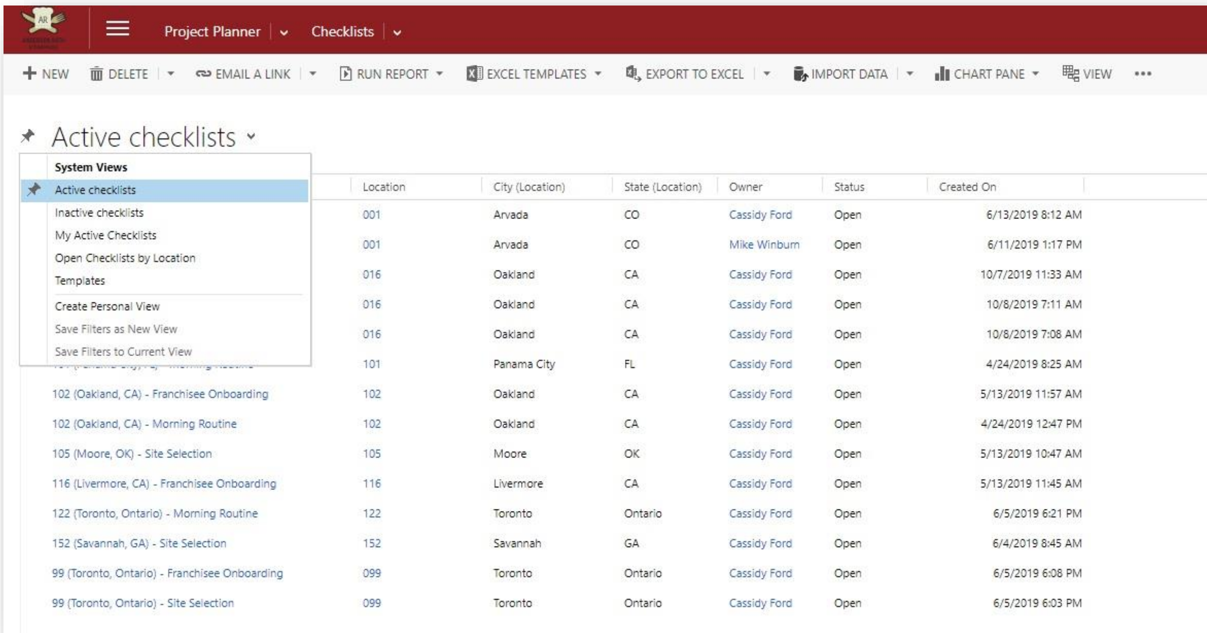
Projects, referred to as checklists, are associated with a location record in FIM, and each location can have many checklists active at one time. Corporate users manage checklists from within FRM, while franchisees manage their tasks by logging into the Franchisee Gateway (reference guide Franchisee Gateway: How to Manage a Project). This user guide focuses on the internal set-up of templates in Project Planner.

1. Accessing Project Planner

First, navigate to "Project Planner" in the main menu, then hit "Checklists." The default view is "Active checklists," but you also have the option to choose the following from the dropdown:

a. Inactive checklists
b. My Active Checklists
c. Open Checklists by Location
d. Templates

When first starting out, you will not have any data in these views.



2. Start by Manually Creating a Template

To manually create a template, begin by finding the Checklists page as described above.

a. Select “Templates” in the drop-down box. You will see a list of all your templates.
b. Select “New” at the top of the page. You will see “New Checklist” at the top of the next page. Here you can:
    i. Create a location-specific checklist that is not a re-usable template
    ii. Create a re-usable template which can be applied as a location-specific checklist again and again
c. Complete the four required fields. To make a template, choose “yes” next to “Is template.” If you want to base the project timeline on business days only, choose “yes” to exclude weekends. Hit save and the Gantt chart will now be enabled.

Best Practices:

- Develop a consistent and generic naming system for your templates, leaving out the word “checklist” to avoid confusion.
- When creating a unique template for a specific location, remember to mark “Is template” as “No.”

3. Start by Importing an Existing Data Template

Many times, creating a manual checklist template can be easier than importing from an existing data template. Most franchisors opt to build their checklist templates manually; however, if you wish to import your data from a standard data template instead, please submit a support ticket through FRM’s Client Support, and we will provide you with the appropriate data templates and instructions. If you wish FRM to import the data on your behalf, or even build a manual template for you as outlined above, we can complete the request as a premier support service.

4. Build Your Manual Template

If you’ve chosen to manually create a template, you’ll build your task list once the Gantt chart is enabled. You can save an incomplete template and return later to finish it, but in order to successfully apply a checklist to a location, all fields in the base template must be complete (dates, durations, assignees, etc.).

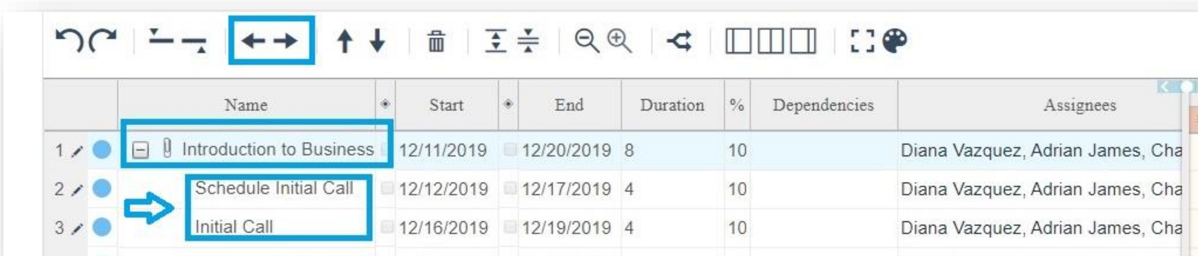
a. Choose Task Status
    i. The status you select in your template will automatically be the starting status of a task when a checklist is applied to a location.
b. Create a Task Name
    i. Manually create the task names by typing in the checklist item.

Tips:

- The default task status is green for "Open," as this is most common in new projects.
- Quickly populate your task list by filling in all task names first, then adjusting task details like dates and durations.
- Clicking on the name field will prompt a drop down with recently used task names for quicker completion.
- Clicking on a task in the Gantt chart will highlight the item in the task list to make finding tasks easier in large projects.

c. Create a Subtask

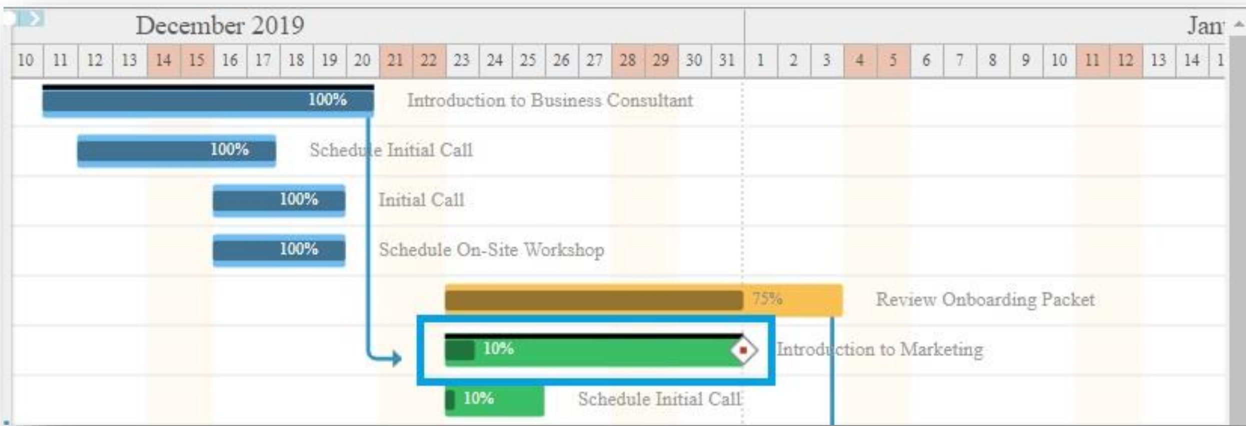
i. Once you've created a task, you can create a subordinate task by hitting the indent button at the top of the Gantt chart.



ii. A main task can have multiple layers of subtasks, which will be further indented in the task list.

iii. All subordinate tasks must be complete before a main task can be closed. As you start assigning dates to tasks, you will see that the main task's end date will change according to the end dates of the subtasks.

iv. A black bar will appear at the top of main tasks in the Gantt chart.



d. Select Start and End Dates
   i. These dates will be adjusted to fit your project when you apply a checklist. In the template, they serve as a baseline to calculate durations of tasks.
   ii. When a checklist is applied, these dates will become your Baseline Start and Baseline End dates. These dates do not change during the project.
   iii. Start by establishing the start date, then input the duration. When you click on a date field, a calendar will pop up for easy date selection.

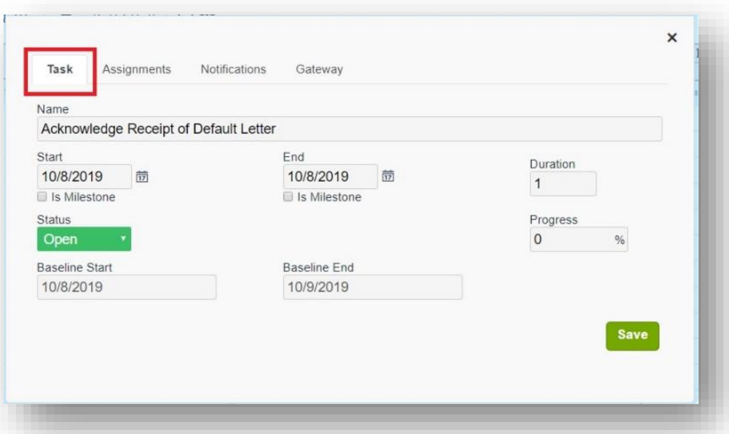
e. Provide Duration
   i. Once you've selected the start date, entering the duration will shift the end date accordingly.

Tips:

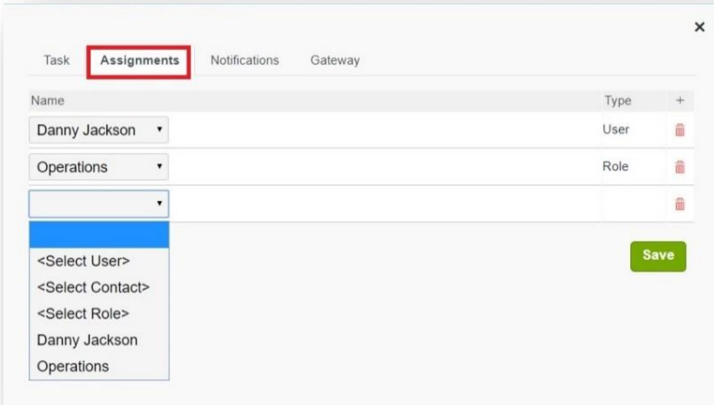
- For easy adjustment of dates and durations, click and drag tasks in the Gantt chart. Make sure you zoom in to land on the right dates.
- Keep your process in mind. If your project timelines are managed from an end date or important final task, rather than a starting date, build your template accordingly. One way of doing this is to set the final task in your template as a "start" Milestone indicating the end deadline for your project. Later, when a checklist is applied based on this template, you should mark the final task as the Baseline Task. Then, assign it the desired date of your deadline, remembering to take the duration of the task into

account. This will cause your checklist dates to populate backward from the end of the project.

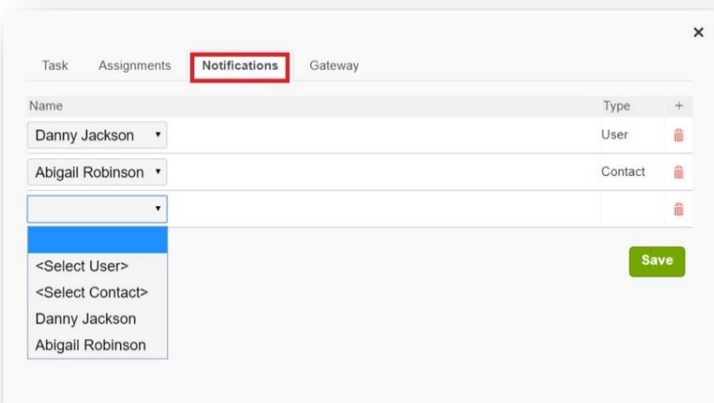
f. Set Milestones
   i. If a task is a project goal, it can be marked as a milestone to be completed just like a task. Milestones can also have durations.
   ii. Selecting something as an End Milestone means that any tasks before that milestone cannot be shifted forward, past that milestone date. Dates on tasks can only be changed directly on that task when the milestone checkbox is checked.
g. Assign Task Details
   i. Double click on the blank “Assignees” field for the first task. A window will pop up which allows you to set the important details of your task. (The task details pane can also be opened by double clicking immediately to the left of the task name).
   ii. All items on the Task tab can be defined in the task list itself.



   iii. You designate task owners on the Assignments tab. Choose from corporate users, system contacts or pre-defined Roles.

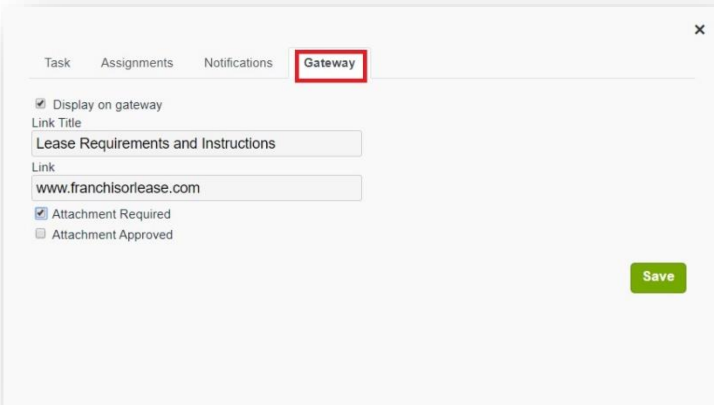


iv. Email notifications (see Section 5 of this guide) are sent to the User or Contact you assign on the notification tab. You can choose multiple people to receive notifications.

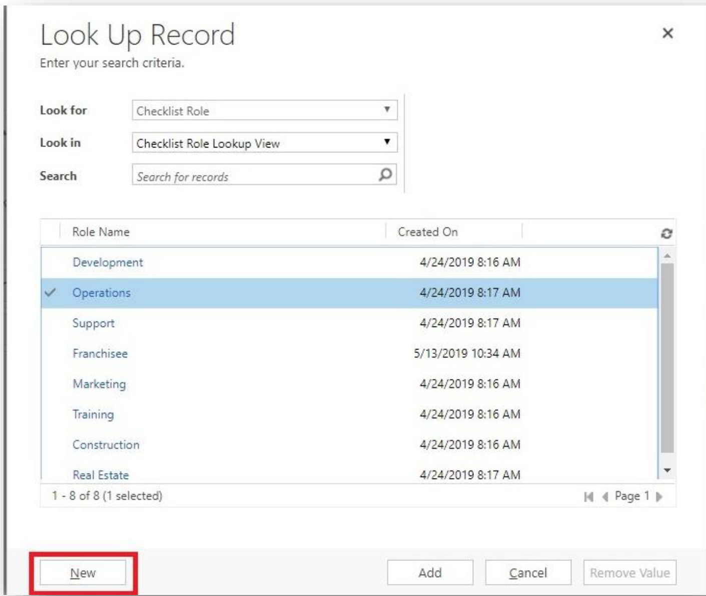


v. You can control how a project behaves in the Franchisee Gateway on the Gateway tab.
   - If you don't want a certain task to be visible to a franchisee in the gateway, uncheck "Display on gateway."
   - You can provide a link to additional resources which will appear in the franchisee's task list under the designated link title on the Franchisee Gateway.

- Checking “Attachment Required” forces a franchisee to upload a document, which you must mark approved, before the franchisee can close that task.



h. Create Roles
   i. If you don’t already know how to create a user or contact, reference the following guides:
      i. User Management Training Guide
      ii. Franchise Information Manager (FIM) User Guide
   ii. You can create many different Roles, such as “Franchisee,” “Construction” or “Vendor.” You can specify exactly who will fill these roles when you apply a checklist to a location.
   iii. The quickest way to create a new role is to hit “New” in the Checklist Role Lookup view, which is found via the Assignments tab when you hit “Select Role.”



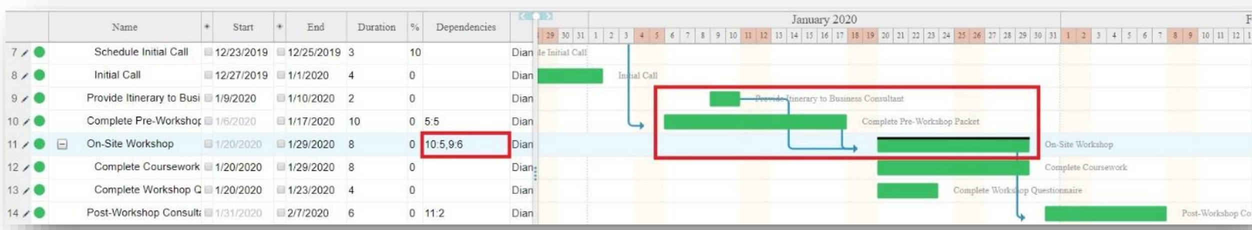
Best Practices: - Unless you know a specific person will be completing a certain task every single time for every single project, assign Roles when creating a template. - If multiple people need to complete a single task separately, create multiple tasks rather than assigning one task to a group of people.

i. Create Dependencies

   i. In the Gantt chart, hover over a task bar then click on the dot at the end of the task bar. Drag your mouse to the start of another task and a line will appear connecting the two tasks.
   ii. Dependencies can be formed bi-directionally, by following this step in reverse.
   iii. Dependencies can also be created in the Dependencies column by manually identifying tasks. On the dependent task, type which task it depends on, add a colon, then type the number of days the dependent task is offset from the original task. In the example below, Task 11 is dependent on Task 10 but starts 5 days after Task 10 is

complete. It is marked as 10:5. See “Common Scenarios” of this guide for a detailed example.

iv. Keep in mind, a task can have multiple dependencies, and can also be offset into the past (Task 11 is dependent on Task 10 but starts 5 days *before* Task 10 is complete, so it is marked as 10:-5).



v. Creating dependencies may limit your ability to move certain tasks forward or backward in time, including tasks with subtasks.

Tip: If you often need to shift multiple tasks forward at once, make all of these tasks dependent. If you change the date of the first task in the chain, all of the following tasks will shift. A good way to identify key tasks like this is to select the “Critical Path” button at the top of the Gantt chart.

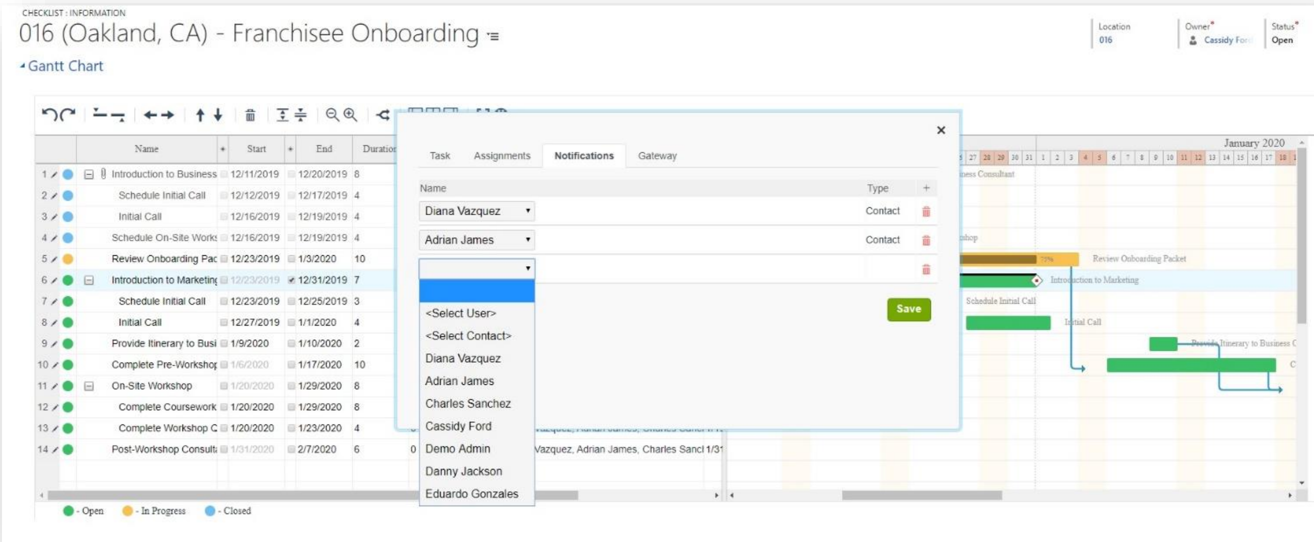
5. Notifications and Communication

a. There are two out of the box notifications:

i. Notify Checklist Item and Checklist Owner on Item Overdue: “This email is to inform you that ‘checklist item’ is overdue for ‘checklist.’ Click ‘link’ to view the overdue item.

ii. Notify Checklist Owner on Checklist Item Closed: “This email is to inform you that ‘checklist item’ for ‘checklist’ has been closed by ‘user.’

b. You can choose who receives notifications on which tasks when creating a template or managing a checklist, in the notifications tab of the task detail.



Tip: If you are interested in learning about customizing notifications, please submit a request through the FRM Client Support portal to schedule a consultation.

c. How to communicate with your team

i. Keep internal notes and records in the Checklist notes section or the notes section in the Location record

ii. Internal Tasks and appointments related to projects can be created in the Activity Feed within a Location record

iii. Utilize the Outlook Plug-in to track team communication (reference FRM Microsoft Dynamics 365 documentation for install and user instructions).

Best Practices:

- Use the Outlook Plug-in to track all email communication, and sync appointments and tasks. This is important for effective internal communication, franchisee accountability and record retention. With the plug-in, you can maintain a complete copy of your incoming and outgoing emails in both your Outlook and in FRM. Watch this video for a quick view of how the plug-in works.

- FRM also integrates with G-mail email, calendar and tasks. (Reference FRM G-mail Integration User Guide for install and user instructions.)

d. How to communicate with your franchisee
    i. Anything recorded in or uploaded to the Notes section of an individual task will be visible to the Franchisee
    ii. When a note or file exists in a task, a paperclip icon will appear to the left of the task status in the task list. Files and notes can be uploaded and received in real time.
    iii. When a franchisee submits a document for a task which requires document approval, you can mark that item approved by Opening the Task→Gateway Tab→Attachment Approved.
    iv. Track all email communication regarding a project in the activity feed of the Location record by using the Outlook Plug-in

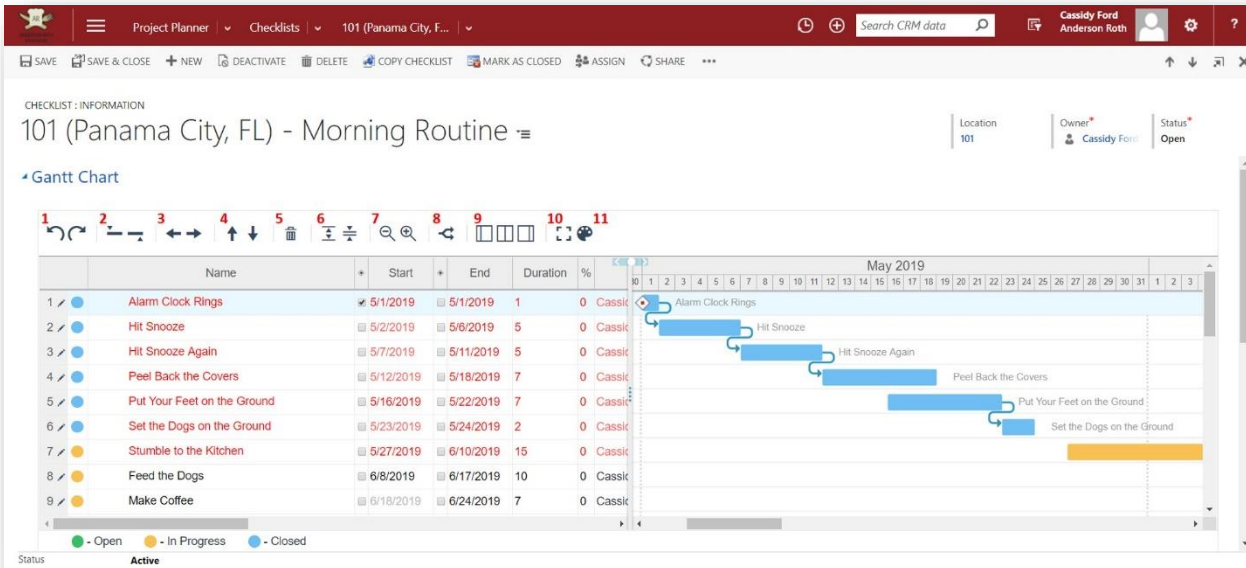
> Tip: If you want to communicate with a franchisee outside of just the notes in the checklist, consider setting up email templates in FIM for common actions. For example, “Your recent file has been received and approved.” Watch this video for a quick tutorial on how to create email templates in FRM.

Glossary

Apply Checklist	This is the process of selecting a base template to turn into a location-specific checklist.
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 applied. 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 applied. 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.
Dependency	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 applied. The dates in this column can be adjusted and indicate the actual end date of a task.
Exclude Weekends	You can create template and checklist timelines based on a full week or a business week. When excluding weekends, task dates are still determined by task duration.
Gantt Chart	Shows the project in visual form and can be manipulated to adjust tasks and dates.
Link	Certain projects may contain links to additional resources pertinent to an individual task. This could be a link to your website, a vendor's website, or even a specific document or folder located in the SharePoint document library of your Franchisee Gateway. See "Common Scenarios" of this guide for a description of how some franchisors use this tool.
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.
Notifications	Simple, templated emails sent to the assignee regarding a particular task.

Role	Selected when creating a new template. When determining task assignees for a new template, you can choose a corporate user, a general contact, or a role. Selecting a user or contact will assign the task to specific person every time you use that template. Choosing a role like “Training,” “Marketing,” or “Operations” allows you to select different assignees every time a checklist is applied using that template.
Start	The start date is established when a checklist is applied. The dates in this column can be adjusted 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. The technical name for tasks in FRM is “Checklist Item,” and those designations are sometimes used interchangeably.
Template	A template follows a theme such as “Store Opening” or “Onboarding.” This is the starting point for repetitive projects, providing the base framework for tasks and timelines which are then applied to specific locations in the form of checklists.

Key



1	Undo/Redo action
2	Insert task below or above
3	Indent/un-indent task
4	Move task up or down
5	Delete task
6	Expand or collapse tasks containing subtasks
7	Zoom in or out of Gantt chart
8	Identify critical path
9	Change view: task list only, split screen or Gantt chart only
10	Full screen
11	Show or hide Gantt chart colors

Tip: Hover over an icon for a description of its action

Frequently Asked Questions

1. **How do I request training, submit general questions or learn about other FRM solutions?**
   We provide one-on-one training as a premier service. Also, we welcome the opportunity to answer your general questions about any of our available solutions any time. All you have to do is submit a request to our Support Team through the Client Support platform. For instructions on how to access FRM Client Support, reference this quick user guide.
2. **Do individual checklists have the ability to talk to each other?**
   You may have multiple teams working in phases on the same project. For instance: Sign Franchise Agreement → Onboarding/Training/Real Estate → Construction/Marketing → Grand Opening → Field Consultants.

   Separate checklists for each team or phase of the project are inefficient, as they do not interact with each other. Instead, create one comprehensive checklist using main tasks and sub tasks to organize different phases of your project. A few notes here:

   - When a template is created, you can assign a task to a Role such as "Marketing" or "Construction" rather than a specific person. This allows you to assign multiple people to a functional role when applying a checklist, and it doesn't have to be the same people every time.
3. **How does reporting work?**
   Every brand tracks and reports on projects in a unique way. If you are interested in building a custom report, please contact us by submitting a request through the FRM Client Support platform.
4. **How do I build my own dashboard?**
   Please reference our YouTube video library for a tutorial on building custom dashboards and views. FRM can also build custom dashboards and views for you as a premier support service.
5. **How can I see where projects are delaying?**
   Many franchisors use custom reports to provide a comprehensive view into roadblocks and delays in their project timelines. You can also look at the Baseline

Start and End dates and compare those to your actual Start and End dates. This will indicate how your project should have played out versus how it actually did.

6. **What does it mean when my task is red in the task list?**
   If a checklist item (task) is red, that indicates that the task is past due.
7. **Does Project Planner work without Franchisee Gateway?**
   After 2019, all new Project Planner implementations will also require Franchisee Gateway. If you are currently operating without Franchisee Gateway, please contact FRM by submitting a request via the Client Support platform.
8. **Can 3rd party vendors access the checklist?**
   This is up to your discretion. If you track vendors as contacts in your system, you can assign tasks to them and also provide them with access on a location by location basis. Keep in mind that in doing this, vendors will be able to see any system-wide information contained in your Franchisee Gateway.
9. **How do I provide additional resources, such as training videos, site specifications and opening guides to my franchisees?**
   During implementation, FRM can create a link in your Franchisee Gateway to a short training video and a franchisee training guide. If you are currently using Franchisee Gateway and would like to add this feature, please contact our Support Team as described above.