FRM Solutions, LLC

Project Planner: How to Manage a Project

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Managing a Project with FRM Project Planner

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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.

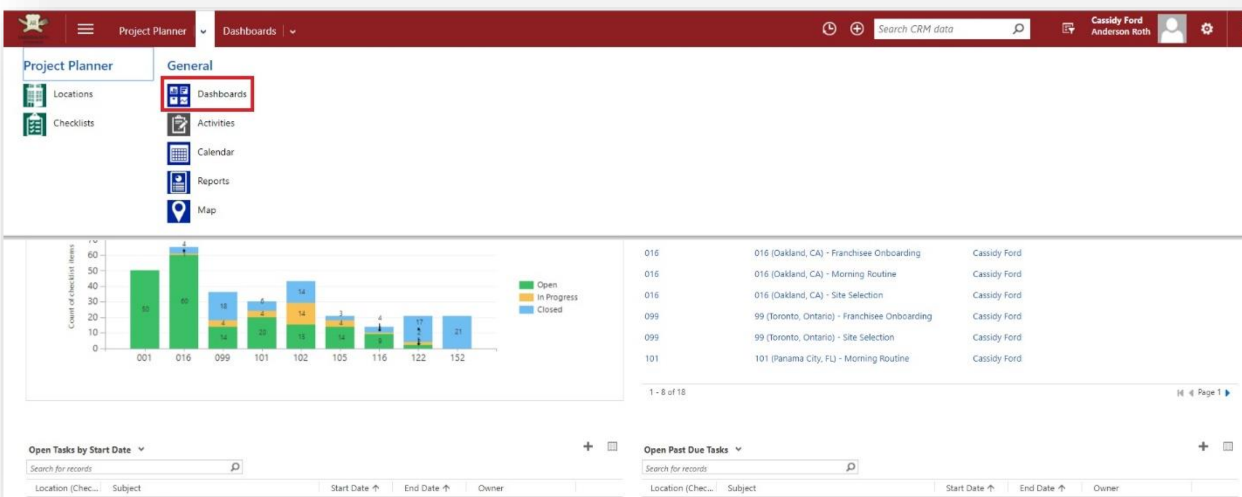
Projects, referred to as checklists, are associated with a location record in FIM, and each location can have many checklists active at one time. Corporate users manage checklists from within FRM, while franchisees manage their tasks by logging into the Franchisee Gateway (reference guide [Franchisee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

1. Accessing Project Planner

There are three ways to view your Project Planner checklists and data.

a. Dashboards: A high-level view of your system-wide project pipeline. [Reference our YouTube video library] to learn how you can use and build your own dashboards.

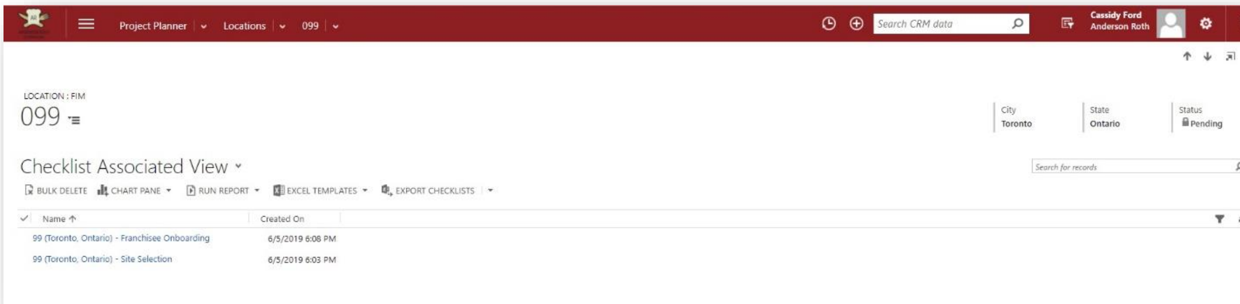
   i. Find Project Planner in your main menu, then click "Dashboards" in the drop-down menu.



b. Location: A sortable list of all checklists specific to one location. This list is accessible from the main menu two ways.

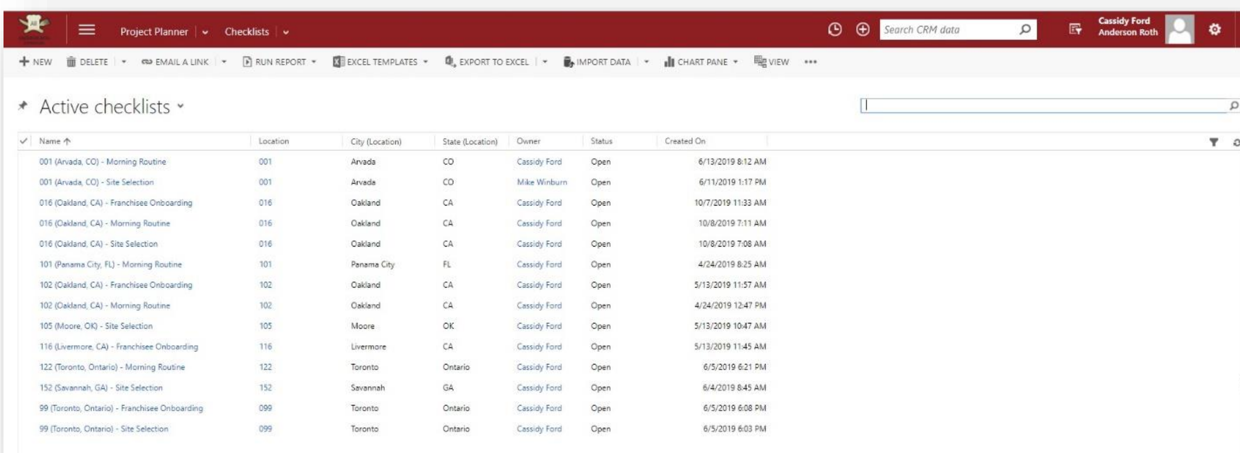
i. In the Project Planner drop-down menu, click “Locations,” select a location, expand the drop-down menu next to the unit number at the top, and click “Checklists.”

ii. In Franchise Information Manager (FIM) drop-down menu, click “Locations,” select a location, expand the drop-down menu next to the unit number at the top, and click “Checklists.”



c. Checklists: A sortable list of all checklists for all locations.

i. Find Project Planner in your main menu, then click “Checklists” in the drop-down menu.



2. Applying a Checklist

There are two ways to apply, or “create” a checklist for a location, depending on your type of project. The most common is to use a pre-existing template. Another option is to create a standalone checklist, which is more typically done for one-off projects.

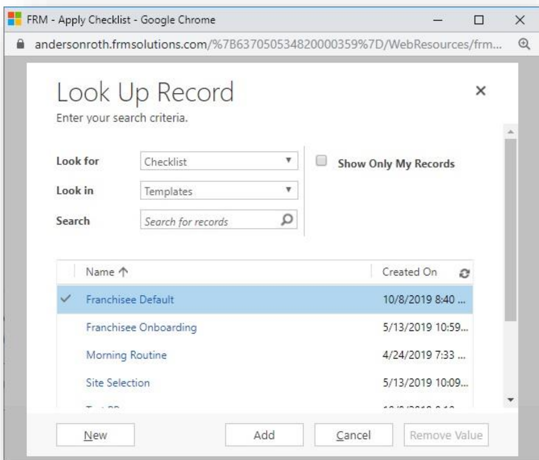
a. Standalone checklists are created the same way as an original template, with a few minor differences. (See guide Project Planner: How to Get Started for instructions to create a template).
   i. Begin by finding the Checklists page. Click "New" at the top.
   ii. Complete the required fields, but mark "Is template" as "No."
   iii. Select a specific location to which the standalone checklist will be applied

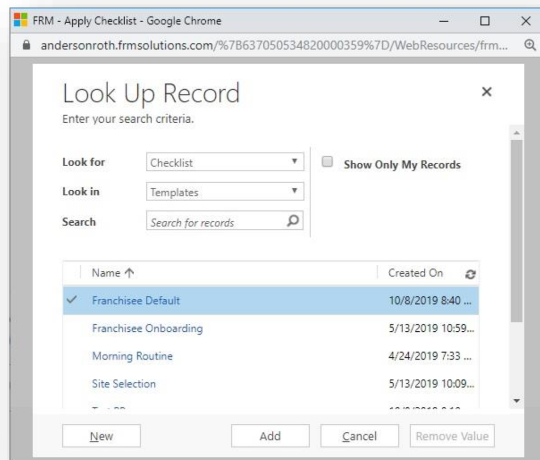
Tip: Follow the same consistent naming conventions for standalone checklists to keep your projects more organized

   iv. Hit "Save, finish the checklist, then hit "Save and Close."
      1. The checklist will now show up in the Active Checklists view of Project Planner and in the Checklists section of the Location record
b. The more common way of creating a location-specific checklist is to use a template, as most of your projects will follow the same steps and a similar timeline.
   i. Navigate to the desired location (see Section 1b)
   ii. Near the top of the location record, click "Apply Checklist" and follow the prompts.
   iii. Choose a Template by clicking the icon next to "N/A." Select the correct template by hitting the check mark to the left of the template name, then click "Add." Then hit "Next" to move to the next step.
   iv. Choose a Baseline Task and a Start Date. This will cause all the dates in the template to populate according to these parameters. The Start Date can be in the past, today, or in the future.

Best Practice: Many project timelines are managed not from a starting date, but an end date or important final task, such as a Grand Opening. If the final

task in your template is a "start" Milestone indicating the end deadline for your project, mark it as the Baseline Task when you apply your checklist. Then, assign it the desired date of your deadline. This will cause your checklist dates to populate backward from the end of the project.





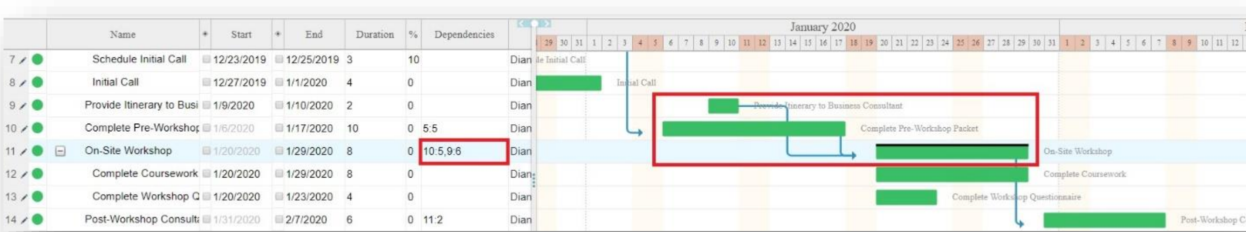
v. If your template has designated roles for tasks, you'll be prompted to assign a User or Contact to those roles.
   1. If a task in the template was assigned to a specific User or Contact, this is the person who will automatically appear as the Assignee in the checklist.
   2. To add multiple Assignees to a Role, hit the plus sign. To remove an Assignee, hit the plus sign and then the minus sign next to the one you wish to delete.
   3. A checklist cannot be successfully created until all fields are complete.

vi. The checklist will now show up in the Active Checklists view of Project Planner and in the Checklists section of the Location record

3. Using a Checklist

You will follow many of the same actions to use the checklist as you did in creating it. See Section 4 of this guide.

a. Reference the guide's icon Key for descriptions of action shortcuts.
b. Adjust tasks by using the down or up arrows at the top of the Gantt chart
c. You can adjust task dates three ways. Keep in mind that dependencies and milestones could limit your ability to change the dates or durations of certain tasks.
    i. Change date fields or shifting in Gantt chart
    ii. Change duration fields or expanding in Gantt chart
    iii. Click and drag a task in the Gantt chart
d. Update percentage of task completion in the task list. This will shade the task in the Gantt chart with the completion percentage.
e. To make changes to the details of the task:
    i. Double click in the space to the left of the task name
    ii. Click on the pencil icon to the right of the task number
f. Changing dependencies can also be done in different ways:
    i. Click and drag a task in the Gantt chart to change dependency or main and subtask timing
    ii. Click and drag the blue dependency arrow in the Gantt chart
        i. To delete, click the dependency, then hit the delete shortcut at the top of the chart
    iii. In the "Dependencies" column in the task list, you can identify the relationship of task numbers you wish to be dependent on one another. 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. 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).



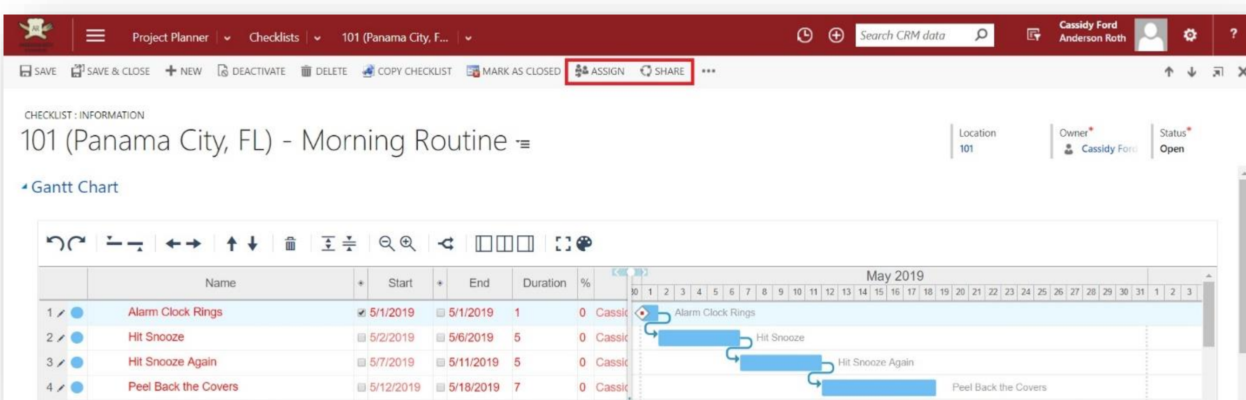
Tip: When navigating through the Project Planner tool, use the navigation buttons in FRM rather than the back button of your browser. To quickly return to recent views or records, click the clock icon near the search bar at the top of your page. This also applies to any unsaved changes to the Gantt chart. Hit the "Undo" button rather than the back button of your browser.

4. Managing Checklists

For high-level project pipeline management, start on the general Checklists page and expand the drop-down menu at the top of the list of checklists. This allows you to toggle through views of projects in different statuses. To choose a default view, click the push pin next to the title.

a. Active Checklist: Any open or closed projects
b. Inactive Checklists: Any deactivated projects
c. Open Checklists by Location: Open projects only

At some point, a project status or owner may change. When working with teams, you may need to share or assign checklists. These actions can be performed via the buttons near the top of a particular Checklist by clicking the "Assign" or "Share" buttons and following the prompts.



Other available actions include:

a. To permanently delete a checklist and all the associated task records, hit "Delete."
b. The "Deactivate" action can be performed for both closed and open checklists, and it is reversible. A deactivated Checklist cannot be modified while it is Inactive.
   i. To re-activate a project, open the deactivated Checklist and click "Activate" at the top of the page.
   ii. Checklists can be made inactive whether they are open or closed.
   iii. De-activating a Checklist removes it from the franchisee's view in the Franchisee Gateway
c. Mark as Closed:
   i. Closed checklists remain Active and can still be modified.
   ii. Any open (active or inactive) checklist will show a "Mark as Closed" button at the top. You will be prompted to provide a reason for closing the checklist before completing this action.
   iii. Marking an inactive, closed checklist as re-opened will not change the status of the checklist to Active.
   iv. Closed checklists remain visible in the Franchisee Gateway

Tip: As with naming templates and checklists, establish consistent reasons for closing checklists so anyone can look at the project and understand the closure reason clearly.

d. Mark as Re-opened:
   i. Re-open a checklist (active or inactive) by clicking "Mark as Re-opened" at the top of the page.
e. Copy Checklist:
   i. If you've made certain changes to a checklist which would be handy for another standalone checklist, select "Copy Checklist" and follow the prompt to "Duplicate this Checklist. Hitting "Next" will complete the action.
   ii. If you've made certain changes to a checklist which would be handy for multiple checklists in the future, follow the same steps above, but select "Create a Template from this Checklist."

Best Practices:

- Only delete a checklist if you are absolutely certain you no longer need it.
- De-activating a checklist is like hitting the pause button. These are projects you either want to put on the backburner or hide from active view.
- Closing a checklist is recommended when a project has reached completion. Ideally, all tasks are marked complete before a checklist is closed. By doing this, you can keep your task reporting/dashboards more accurate.

5. Making Changes to a Checklist

Your established Templates will be applicable across the board to your projects, but each project is always slightly different. All the items in the Task List are adjustable, except the Baseline Start and Baseline End dates. Many of the actions taken to manage checklists are similar to those used in setting up templates, specifically changing any items in the task detail pane.

Details can be changed in the various columns of the task list, or in the task detail pane. You can access the task detail pane by double-clicking to the left of the task name. Please reference the user guide Project Planner: How to Get Started for more information.

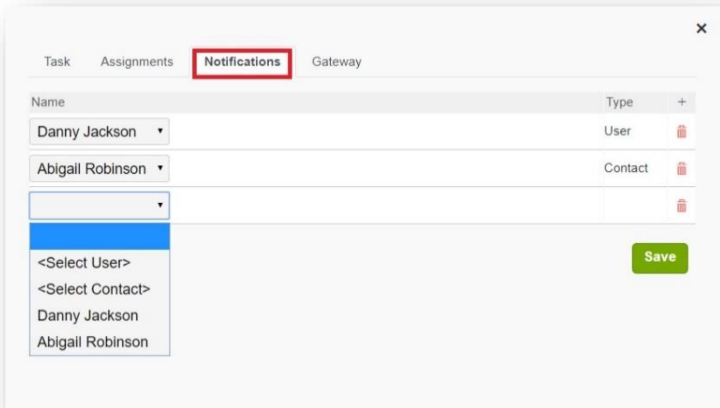
Tip: If you are trying to open the task detail pane and a task already has a note attached or if it is a main task, double-click to the left of those icons.

6. Notifications and Communication

a. 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.
b. There are two out of the box notifications which will be established when the template is created:
   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.’

c. To turn on notifications to assignees for a certain task, navigate to the “Navigation” Tab of the task detail pane, and follow the prompts.

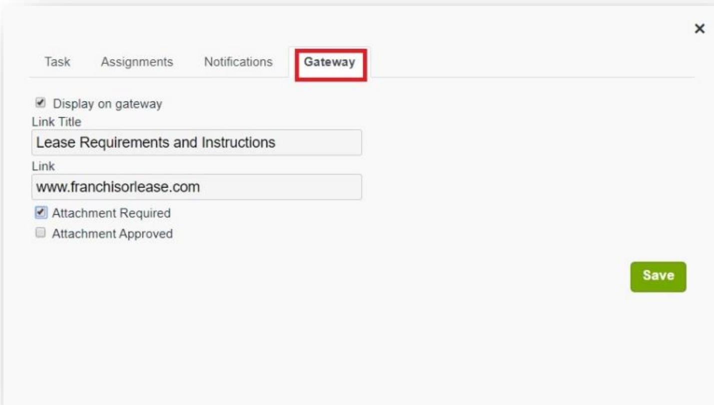


Tip: Streamline the number of alerts you create. Setting up notifications for many tasks and actions can be ineffective and overwhelm your team.

d. 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

e. 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, finding the Gateway tab, and marking "Attachment Approved."



iv. Track all email communication regarding a project in the activity feed of the Location record by using the Outlook Plug-in

Best Practice: If you are a PC and Outlook user, you can track all incoming and outgoing email communication in FRM using the Outlook Plug-In. Tracking communication increases efficiency between team members and provides a compliance track record for your franchisee. An integration is also available for G-mail users. Installation instructions can be found online, or FRM can install the plug-in for you and provide training as a premier support service.

7. Using Franchisee Gateway

For instructions on how to manage tasks which appear in Franchisee Gateway, please reference one of two user guides:

a. Franchisee Gateway – How to Use Project Planner
b. Project Planner – How to Get Started

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.
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 th 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.

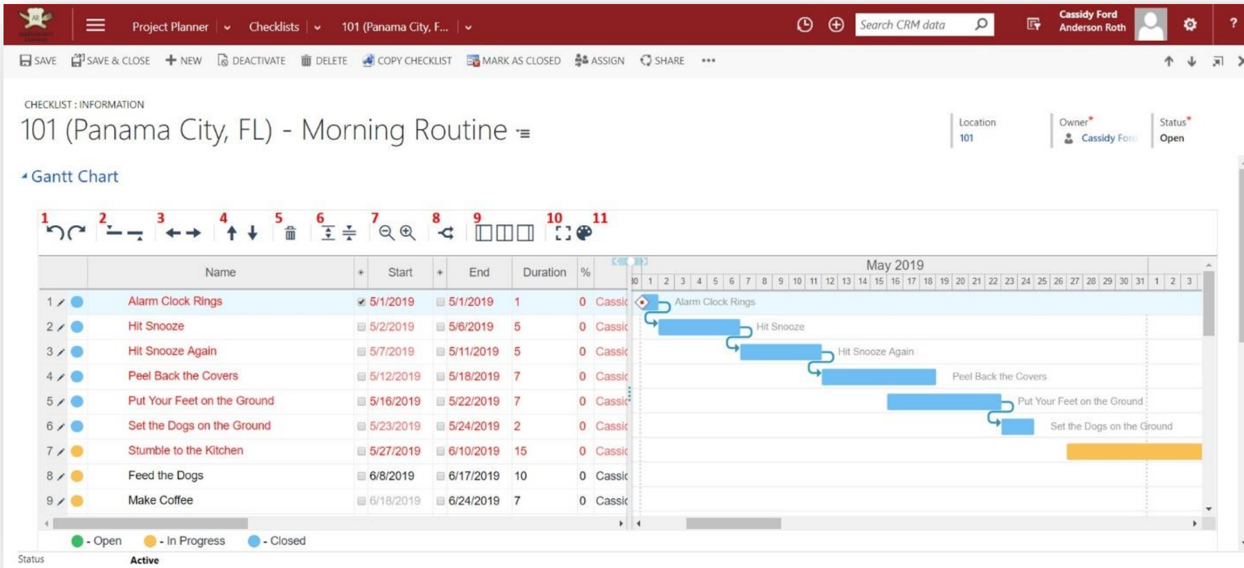
Start The start date is established when a checklist is applied. The dates in this column can be adjusted and indicate the actual start date of a task.

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.

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