ProjectShare Quick Guide

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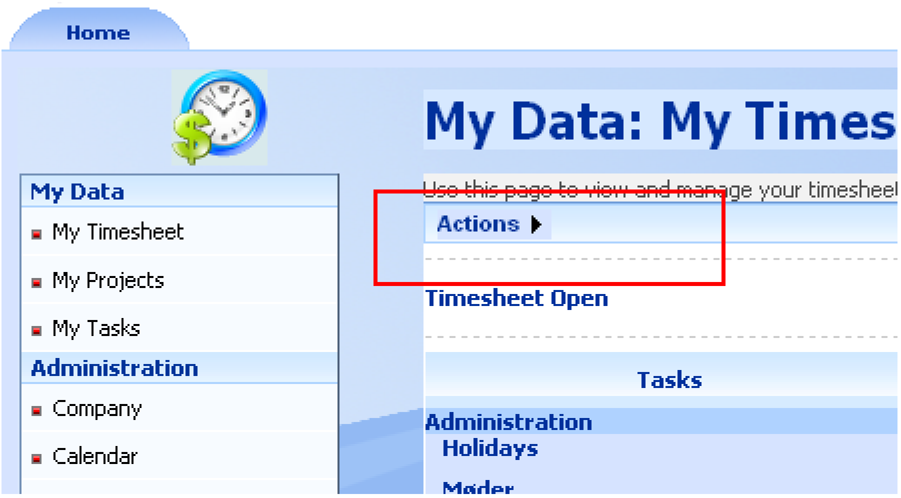
How buttons work in Projectshare (Importaint)?

In almost all of the screenshots you can see a command-bar with buttons (**Actions**).

Under actions menu there is a series of buttons arranged in a row.



How do I set up Project Share for the first time?

You are ready to start because the ProjectShare is automatically configured during registration process.

1) You must log in as administrator.
2) (Be prepared) Draw your organization chart on a piece of paper,
3) Go to left menu "**Company**," Create multiple companies if necessary.
4) Go to left menu "**Department**", Create your departments for the company.
5) Go to left menu "**Calendar**" Change the calendar or standard time, if necessary.
6) Go to left menu "**Administrative Hours**" and Add more administrative activities, if you need additional ones (Requires Administrative Module).
7) Go to left menu "**Users**" and add your employees.
8) Go to left menu "**Projects**" and add your Projects and Activities.

How do I create a new Company?

1) Go to left menu "**Company**"
2) Add more companies by clicking on the command bar menu "**Actions -> Add New**".
3) Enter Company Name, Currency and press "**Save**".
4) You can modify an existing company by clicking on the icon " ".

How do I create a new Department?

1) Go to left menu **"Department"**
2) Add more departments by clicking on the command bar menu "**Actions-> Add New**".
3) Add the Department number and name.
4) "**Company**": Select the company that the department belongs to.

5) **Subdepartment of** : If the department is a subdivision of some other department, select the department from the list.
6) Click **"Save"**
7) You can modify an existing one by clicking on the icon" ".

How do I create a new Employee?

Note: There must always be at least one employee that has administrator rights.

1) Go to left menu "**User**"
2) Add more users to click on the command bar menu "**Actions-> Add New**".
3) Add the user main information under the tab "**General**".
4) Add rights to the user, under the tab "**User Roles**", if you choose it to be department manager then the user will become department manager for the department that is denoted in "Basic Info" tab.
5) Assign the Department manager for newly added user, you can do this under the "**Department manager**" tab, the department manager may approve hours for the user.
6) The user is assigned a default calendar automatically, but you can change user's calendar by using the "Calendar tab".

You can only change the calendar when you click edit on one of users listed in user list.

1) Select the new calendar from the list
2) Click the "Add Calendar"
3) Select the date from which the calendar will come in effect.
4) Click "Save."
5) Then press the "Update"

How do I create new Administrative Hours?

Administrative hours are used for global or department related activities and absences, as well as meetings, faculty meetings, holidays etc.

You can also use administrative hours for "work account", ie use the fields to gather the hours that deviate from standard time. Ie if standard time is 7.5 and if the employee has spent 10.5 hours. Here, the employee enter the difference of 3 hours in the "working account" box.

"Work Account" can be used for different types of work ie. overtime, 100%, 50% overtime, flex or similar entries.

How do I create an Activity?

1) Click on the command bar menu "**Actions-> Add New**".
2) Enter the name of the Activity in the "**Category**"
3) Select "Work Type", select **Absence** activity as well (Holiday, vacation hours, maternity sick leave, dental, etc.).
4) Select Company and Department whose activity must belong to a particular department.
5) Select the **Type**, ie. whether the activity should be calculated as days or hours.
6) Select **Activities** from the Activity Type.
   Choose your work account if the fields are to be used for overtime, or flex. (See Note)
7) *Select "**Show in Work balance**" if this activity is to be budgeted or reset. (See Note)*
8) Select **Import to MS Project**, for those absences that will be imported into MS Project.
9) Click "**Save**"

***Note**: The percentage rate will be used **ONLY** for activities such as "**Work Account**". You can for example, create an account to work with a 50% rate. I.e. when the employee enters 3 hours in the box then calculated the total to **4.5** and the totals in Timesheets. When the employee is compensated for overtime hours, you can reset the totals again using the **Work balance** menu. Using **work balance** menu, you can budget your activity. Holiday is a typical example. You can enter the number of vacation days before 1 May. At timesheet employee can see how much*

leave he/she is good and even when he/she enters his holidays in timesheet so he/she can immediately see how many holidays he/she has left.

How to combine my work balances and administrative hours?

How do I reset overtime that is spent for an employee?

You can reset an administrative hours (example: overtime) under the menu item: "**Work balance**".

You must have a manager or administrator rights.

1) Click **Work balance** on the left menu.
2) Click on the command bar menu "**View/Save**".
3) Select the users for which you want to change data. (You can select multiple employees by holding down the Ctrl key + right mouse click). You can see the list of administrative hours for the staff that you have selected.
4) You can see the hours consumed on the work account (including overtime, 50%) is set to 1.5 hours. By entering -1.5h it will reset from 1.5 to 0.

Action ▶

ALB (Aleks - Bakalov)

Admin Task	Balance	Adjust	Note	Changed by	Changed	
Holiday	0.0d			administrator (Bobby Saeidi)	21/07/2009	
Overtime 50%	1,5h	-1,5		administrator (Bobby Saeidi)	21/07/2009	

5) Go to the **actions** and press **Save**

Note: you can update the more users at once by using the under **Show/Hide** command bar button and selecting multiple users from the list box on the left.

Groups Alignment of all administrative activities

AdminTask	adjust	Note
Holiday	29	
Overtime 50%		

How do I budget for my Administrative hours (working balances)?

Absence activities, holiday or free hours are typical activities that can be budgeted.

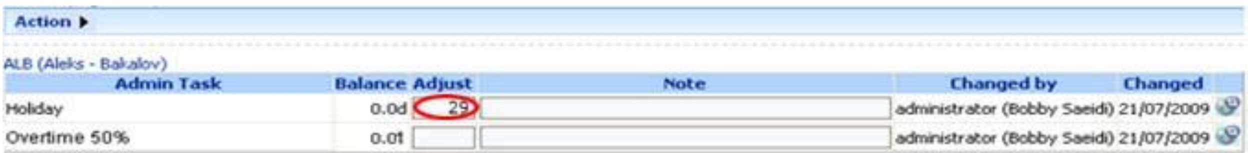
It is necessary to update the holidays for employees before 1 May and you can enter number of day in specified holiday.

You must have a manager or administrator rights.

1) Click on the command bar menu "**View/Save**".

2) Select the users you want to change. (You can select multiple employees by holding down the Ctrl key + right mouse click). You can see the list of administrative hours for the staff that you have chosen.

3) You can enter the number of days/hours for which you want budgeting.



Action ▸

ALB (Aleks - Bakalov)

Admin Task	Balance	Adjust	Note	Changed by	Changed
Holiday	0.0d	29		administrator (Bobby Saeidi)	21/07/2009
Overtime 50%	0.01			administrator (Bobby Saeidi)	21/07/2009

4) Go to the **actions** and press **Save**

How do I create Project Types, Projects and Activities?

Once you have defined your business and employees, you can define your projects and activities.

You must have a manager or administrator rights.

How do I create Project Types?

Always start with the creation of project types. Defining the types of projects so you can categorize your projects.

Example: Use of Project Types

Projects:

Internal projects, External projects, IT projects

Customer-name:

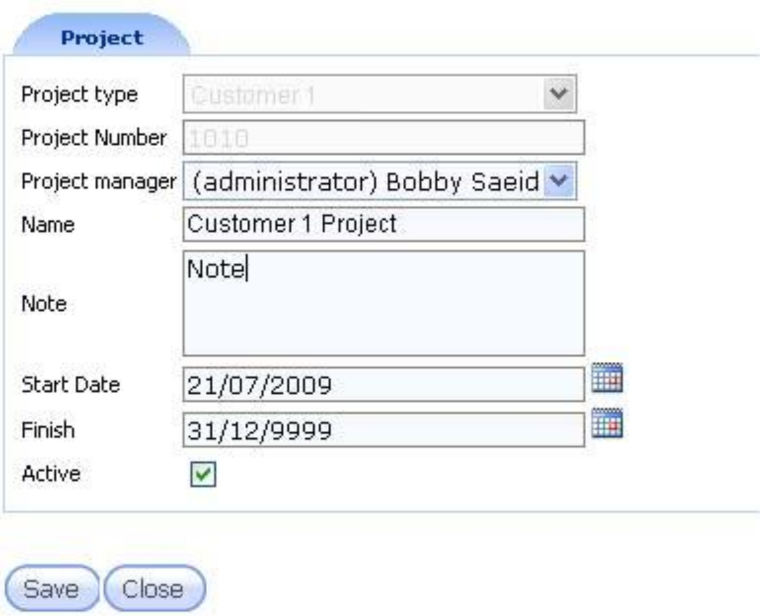
IBM, ADEPT, DSB.

1. Select menu **Project Types**
2. Go to **Actions-> Add New**
3. Enter the **Project type name**. Now you're ready to create your projects.

How do I create projects?

Following steps will enable you to create projects:

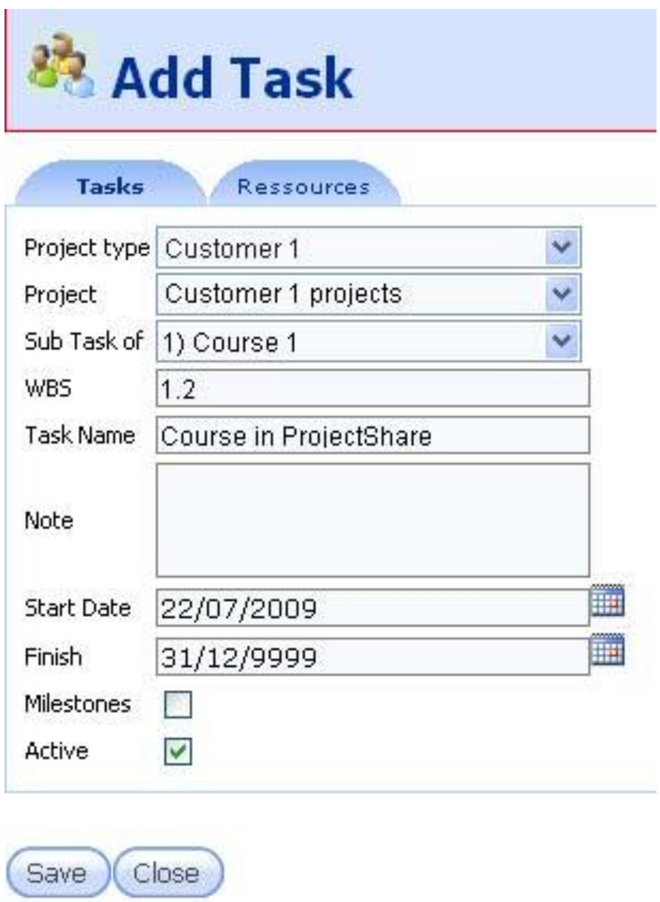
1. Select the **Projects** from the left menu list
2. Go to **Actions-> Add Project**
3. Select **project type** from the list
4. Project number is automatically created.
5. Select the Project Manager for the project.
6. Enter the name of the project (You can also use the name of the client)
7. Enter a short description (optional field)
8. Enter the start date.
9. *Enter end date (end date of 31-12-9999 is used if the project has a long project life span: Ex. projects such as the support, marketing projects, internal IT projects).*
10. Press save



How do I create activities?

Follow these steps to set up activities for your project:

1. Select the **Projects** from the left menu list
2. Go to **Actions-> Add task**
3. Choose the **type of project** under which the project is saved.
4. Select **Project** from the project list
5. If you want your activity to be a sub-activity, choose one activity from "**Subtask of** " list.
6. Enter the task name.
7. Enter a note (optional field)
8. Enter the start date.
9. Enter the end date.



10. Click on the tab named "**Resources**"
11. Select the users you want to assign the activity. You can select multiple users by pressing Ctrl + mouse click from users - the list.
12. *If you want to budget hours to resource allocation, enter the number of hours in the "**Work**" and*
    Click Add.
    Enter 0 if resource allocation has no budgetary demands.
13. Press Save, When you click Save you're ready to add new activity.

How do I find my projects from the list?

You can find your projects and activities quickly and easily.

1. Click **projects** from the left menu
2. Click on the command line **View/Save**
3. Select the project type from the list
4. Every time you change the project type, the system list which projects/activities that are stored under the
   selected project type.
5. Click on the project or activity that you want to change
6. This opens the project/activity that you can edit.

Note: *you can also search by entering part of the name of your project or your activity is the search field and click **Search.***

Default

- 1010) Additional Projects
- 1020) Salg
  - 1) Salg
- 1030) ProjectShare project
  - 1) Requirements
  - 2) Design
  - 4) Test
- 1040) ejendomsprojekter
- 1050) Software Projects
- 1060) salg af træer