Workplan.gov

Work Plan & Capacity Analysis
User Manual

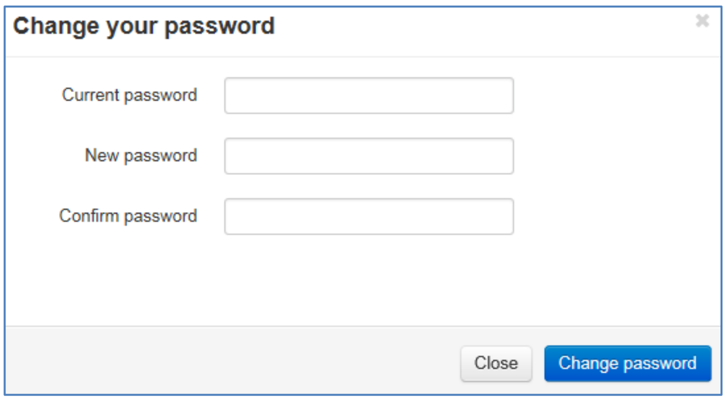
Introduction

The Work Plan software is for time management and project management for staff. This tool offers a concise method for creating, implementing and tracking Municipal Projects and the requisite tasks and time commitments associated.

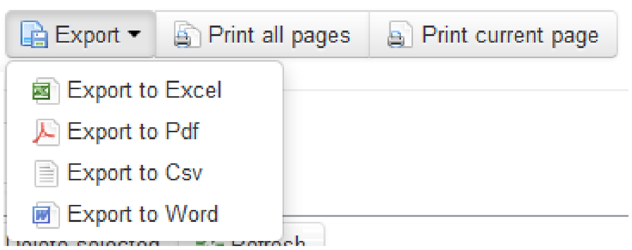
Essential Navigation and Concepts

The first thing you should do is update your password. On the page header look to the top right corner beside the Logout link for the key icon .

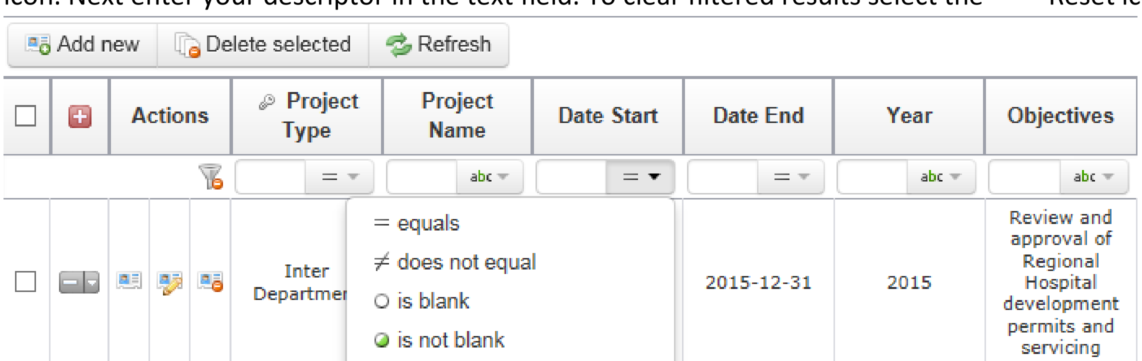
The process is familiar; make your new password unique and relatively simple.



Each section of the Work Plan software has an “Export” link at the top of the page which will allow an export of each table to a variety of formats:



About Filters – These provide convenient methods of sorting and searching for relevant data. Set your cursor in the requisite field and select your criterion such as “equal to” using the icon. Next enter your descriptor in the text field. To clear filtered results select the Reset icon.



About the Drill down Feature

Drill down and expand sections using the various icons throughout the site. The red + icon will expand entire sections. The Grey + icon will expand individual elements and the down arrow icon will jump you directly to the relevant time sheet.

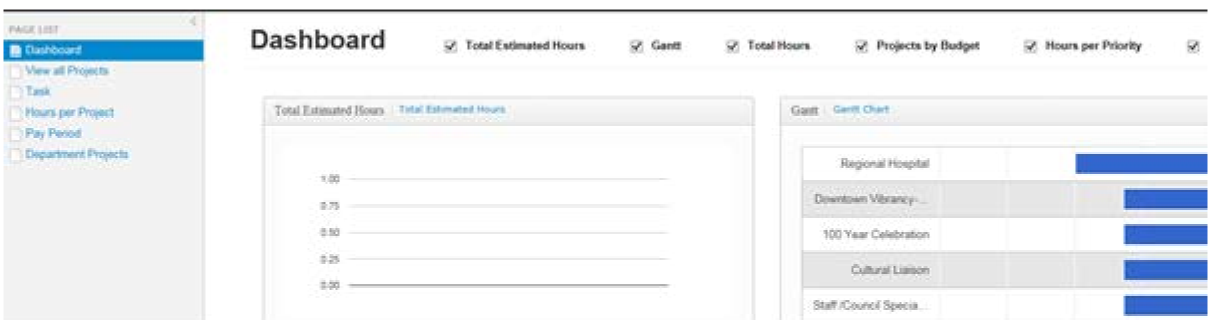
Use this bank of links to "View", "Edit" or "Delete" Task elements

The "Page List" navigation links provide access to elements of the software. You can toggle this element using the , icons.

Dashboard

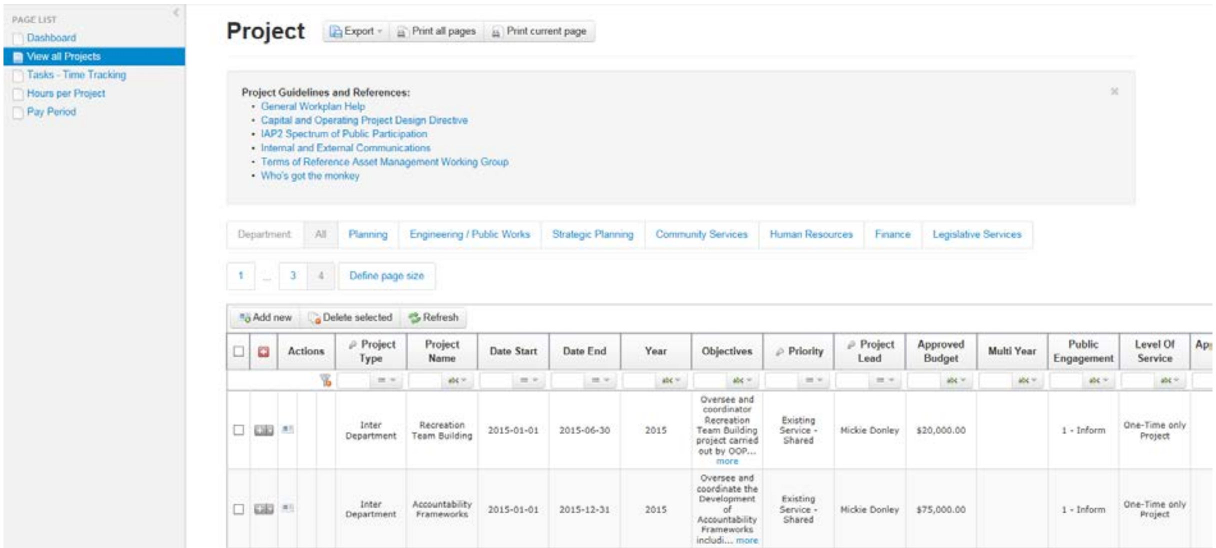
The default page on logon displays summary data of users profile in Work Plan. Manage the view by selecting or deselecting the Check boxes. Click and hold the header bar of any window to move it about on the page to create your own unique layout. Customize the page by selecting or deselecting the check boxes along the top of the page.

Take in all of the interactive features and Hyperlinks on the Dashboard page. Follow the links into each module to see fine detail. Hover over each element to see real time results.

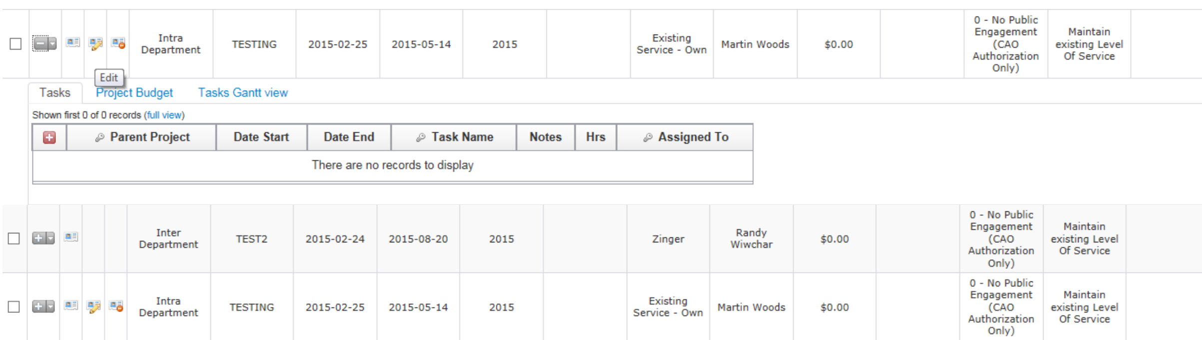


View all Projects

Provides a "read only" view of all Projects, any Project you own can be edited. Take note of the "Project Guidelines and References" section for Help and conceptual understanding of the Work Plan system. Use the Page Navigation and "Define page size" to view as desired.



Drill into all Projects using the icon and view associated tasks. Use the icon to navigate into specific Project's. The default view is Task overview; select (FULL VIEW) to show the Tasks fine detail. Drill into the (FULL VIEW) in your Task to enter "Time Tracking". This is where you will enter your time for your various tasks. Project Budget provides a chart comparison of the Approved Budget vs the Budget Spent. Task Gantt View provides a projected timeline of each Task in the Project.



Use the "Edit" icon to jump directly into editing your Task, Add Project to Outlook Calendar if you desire.

21 Add Project Calendar to Outlook

TESTING

Save | Cancel

Project Type *	Intra Department
Project Name *	TESTING
Date Start *	2015-02-25
Date End *	2015-05-14
Year *	2015
Objectives	
Priority *	Existing Service - Own
Project Lead *	
Approved Budget *	0

Tasks – Time Tracking

View and edit all of your Tasks. Utilize the filters to isolate specific tasks. Drill down to view Timesheets. Add New to add hours onto the task. Use the Search tools to find key words.

what

Hours	Notes	Date
2	what is next	2015-03-12

If a Project has been approved by the CAO, only new Budget and Progress percentage complete entries can be edited. Select the Edit Icon in the Projects list to update “Budget Spent” and “Progress”

Master record (Return to list)

Project Type	Project Name	Date Start	Date End	Year	Objectives	Priority	Project Lead	Approved Budget	Budget Spent	Multi Year	Public Engagement	Level Of Service	Approved by CAO	Progress	Department
Inter Department	Project TEST123	2015-03-09	2016-03-03	2015		#1 Council - Braidwood Housing		$0.00	$0.00		0 - No Public Engagement (CAO Authorization Only)	Maintain existing Level Of Service	✓	0%	Legislative Services

You cannot edit, add or delete a Task from an approved Project

An error occurs during insert:
You cannot add a task to an approved project.

Hours per Project

Provides a simple tally of hours dedicated to all your Projects utilizing Pie Chart, Gantt and table view.

Pay Period

Provides a view of hours entered by Project using a standard Pay Period structure.
Use filters to isolate particular jobs if you’re working on multiple Projects in a day. Open a separate window to keep an eye on this table as you work thru the day, click on the Refresh icon to update periodically.

For the Power User

You can define the view of your page and limit what you see based on user defined criterion. Select the "Create Filter" hyperlink at the bottom of the page.
Select your criterion option (And – Or…) from the "abc" dropdown and then Add condition(s) enter your descriptor in the text field
*TIP: simply entering the first character of the descriptor should suffice. To clear the filter and return to the default view click the "Reset Filter row" icon