WorkPlan.Gov - Work Plan & Capacity Analysis

Admin 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.

The User Interface is simple for fast data entry and to see at a glance:

- A list of projects by approved budget
- A project Time Line Gantt Chart
- Total hours by staff
- Total Allocated hours by staff
- Total Allocated hours versus Actual hours by staff
- And total Allocated hours by Priority.

Page Elements

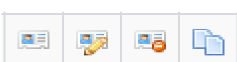
Page elements facilitate organization and navigation from parent to child levels of the Work Plan. Within a Project you can drill down into all or one Project. Drill further into Tasks then time sheets. You can jump directly to relevant Time sheets or edit a given Project or task.

- enter text search and clear search field

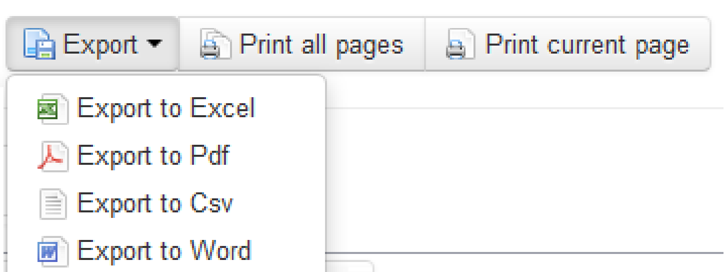
- personalize and clear your own filters


- drill down to all elements


- drill down to individual elements or jump to time sheet

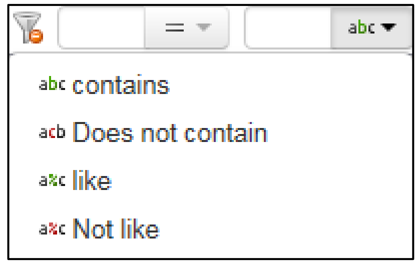

- view, edit, delete or copy elements

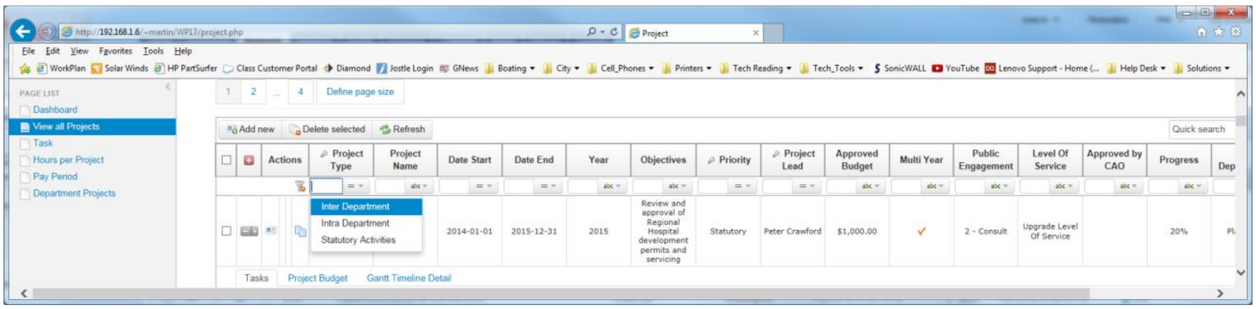
Each section of the Work Plan software has an “Export” icon at the top of the page which will allow an export of each table to a variety of formats:



About Filters – Filters provide convenient methods of sorting and searching for relevant data.

The “abc” drop down arrow sets predefined conditions. Enter your criterion in the text field to define your Filter. Some fields accept text input, some are predefined.





Page List

The Administrators Page List has an expanded Listing of system elements. These links provide administrative control over these elements. They are not operational as a User would typically see. By default the Administrative user sees all Users details.

Dashboard

The default page on logon displays summary data of users profile in Work Plan. The individual elements can be collapsed and moved around the page to suit the user’s desires. The users view is determined by Permissions established under the Admin Page.

Project Type

An Administrative page to create new Project Types. Current Types are Inter Department, Intra Department and Statutory Activities.

View all Projects

Provides a Read Only view of all Projects within the system. Projects assigned to the user 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. Note, if Projects have been approved by the CAO they become read only except for the Budget Spent and Progress fields.

Tasks – Time Tracking

View and edit all Tasks. Drill down to view Timesheets.

Hours per Project

Provides a simple tally of hours dedicated to any Project and all users.

Staff

An Administrative page for the creation of system users. The copy command speeds the process if a user details are comparable to another. Select 

and fill in the pertinent details. See the Admin page for setting permissions.

Time Tracking

Provides an overview of all Task time commitments for all users. Use filters to isolate user names.

Priority

An Administrative page for the definition of Project Priority levels

Task Names

An Administrative page for the for the creation of Task Names

Pay Period

Provides a view of hours entered by Project using a standard Pay Period structure. Open in a separate window to keep an eye on this table as you work thru the day.

Department Projects

The main activity and working area of the application. View all Projects by Department. 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. Note, if Projects have been approved by the CAO they become read only except for the Budget Spent and Progress fields.

Department

An Administrative page for the for the creation of Department Names

Administration – Admin Page

Allows for creation of new users and setting granular permissions of users. Generally you should use the Staff page to add users.

Permissions levels are:

Admin	Global view and control All, typically for site Administrators only
Select	Allow view
Update	Allow edit value
Insert	Allow create new
Delete	Allow delete

The permissions table view is logically laid out to reflect the structure of the Work Plan application. Names of Elements are obvious and selections should be made based on the Users functional need. To edit a user’s permissions select “Permissions”, make changes then close “Permissions to apply changes made.

Admin or User #1 permission is set as:

Page name	Admin	Select	Update	Insert	Delete
Application	☑	☑	☑	☑	☑

How to Set Permissions

When you open the users Permissions window you will see the default Page elements that the user has access to. Any changes made take effect when you select the Permissions button again to close the dialogue.