Hour registration and project management in WATCH

Quick Start Guide

Enter employees and customer(s), start the first project in WATCH, monitor and manage projects and hours

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WATCH quick start guide

Before you start working with WATCH, please read this quick start guide. This guide contains the minimum information to make use of WATCH. Other guides will be available with more in-depth information, but here you will find information to:

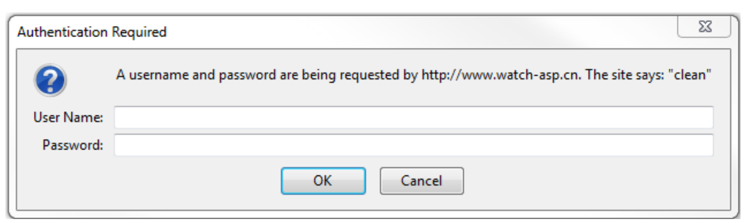
- login to WATCH and adjust user display language to English
- input employee and customer information, essential to plan projects
- setup the 1st project, add the project elements, and assign employees (resources) to work on these project elements
- start with hour registration (timesheet)
- start with management overview and controls
- plan the project in the employee Calendar
- create security groups
- make project management easy

Login to WATCH

When requesting a trial period for using WATCH, an administration is created for you. An e-mail will be sent with an internet address (URL) and login information.

To provide optimal security, the location of your administration is protected on the internet server. When you visit the internet address supplied in the e-mail, you are requested to supply a name and password. This name and password is for everybody using your administration the same. This is how it looks like:

In Internet Explorer 8



In Firefox 3.5

After you fill in the protected directory login credentials, you will see the WATCH login screen

In the WATCH login screen, each employee has his/her own login credentials. Employee information is registered in WATCH by the administrator of WATCH. In the e-mail you will find the login credentials for the administrator in ***your*** WATCH administration.

Employees and customers

Now that the display language is set, one more action needs to take place before we can start planning a project. Some standing data has to be entered: Employees and customers

Because this is a quick start guide, the employees entered are registered in the ADMINISTRATION group, which means these employees have full access to the application. After you have made yourself familiar with WATCH employees can easily be moved to another group, which allows them only access to menu options they actually need. At the end of the quick start guide you will find a short manual to arrange this.

Add employees, go to: Administration -> employees.

1. Create a manager account first. The fields with a * are required fields
2. Create normal employee account, fill in the required fields ***and*** select the manager, as manager of these employees.

Add customers, go to: Administration -> Customer.

1. Enter 1 customer, fields with a * are required field. Create a recognizable customer code! The information you enter, is immediately parts of the WATCH Contact Relation Management (CRM) section

The 1st Project

For creating a project in WATCH, you need to do the following:

a. Create a project, which is a container to connect activities, employees and hour registration together
b. Create project elements, which are the different parts of a project which can be management separately and give you the ability to control the project. Each project should have at least 1 project element.

c. Assign resources to the project elements. Here you will assign employees to the tasks (project elements)

Now is a good moment to watch the flash video tutorial on the website (Support Menu). The tutorial will show the creation of a project, creation of 3 project elements, and will assign employees to the project elements.

1. Create a project.
    a. Go to Administration -> project
    b. Select the customer, fill in the required fields
    c. Fill in not required fields to give you control over the project. Examples:
        i. Estimated hours, to see in reports if the registered hours are as expected
        ii. Estimated start and end date to keep control over deadlines

Status: A project manager has 3 options available for status:

- “in preparation”, in which he is setting up a project, including assigning resources, but other employees will not be able to “ see” the project and register hours on this project
- “ in progress” which is the status assigned employes can register hours on these project (elements)
- “closed” The project or project element is closed, no hours can be registered anymore. The task is finished.

2. Create ***Project Elements***:
    a. Go to: Administration -> Project elements
    b. Fill in required fields. Also here you can set the status. Each element of the project, has an individual status position.
    c. Fill in not required fields to give you control over the project. Examples:
        i. Estimated hours, to see in reports if the registered hours are as expected
        ii. Estimated start and end date to keep control over deadlines of project elements

3. Add ***Resources*** to the Project Elements.
    a. Go to Administration -> Resources
    b. Select the project elements and add resources, you can add more than 1 resource to each project element
    c. If required, add estimated hours you think the employee will need to handle the task.

Only when you assign employees to project element, the project elements will show up in the timesheet of each employee assigned to the task.

Timesheet

Timesheet is being used to register hours on project elements. See Figure 4. A week can be selected, on the left side you find the project/project elements, days to deadline, estimated hours left, hour fill in, and notes to make by the user.

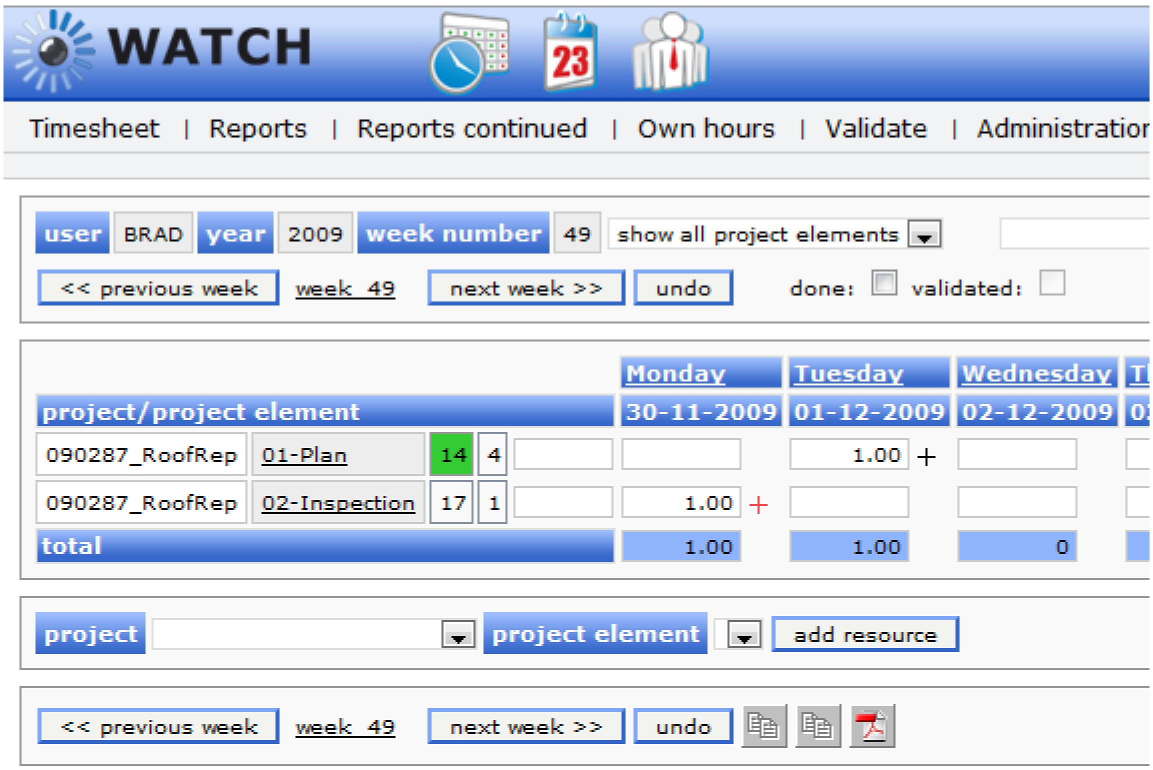


Figure 1 Timesheet example

At the end of the week, when the user is finished registering hour, the employee selects “done”. When the manager approves, the manager can select “validated”

The configuration of Timesheet can be adjusted in “Settings -> System setting”

Management overview

The manager and project manager have several ways to monitor project.

The project manager, who is the direct manager of the employees in his team, has the “Timesheet -> Hour registration by manager” screen. Which is the same as Timesheet, but can be used to register hours for the people in his team.   See picture.

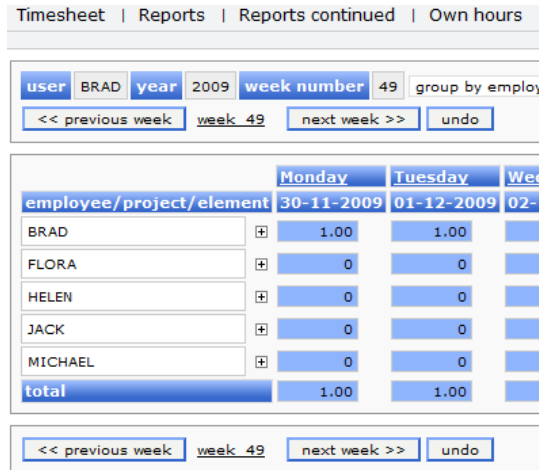


Figure 2 Timesheet manager

Higher management can directly access the registered hours using the “Validate -> Validate total” menu option.

The menu options””Report” and “Reports continued” supply management with various valuable report about project hours, costs, progress and planning.

Calendar planning

The middle icon in the screen top menu bar gives access to the Calendar

Use the Calendar to carefully plan each day of each employee. It will provide the project manager with a clear overview of the workload of each employee. Each time an planning is made, you have the option to sent an e-mail to the employee with an outlook iCalendar file. This e-mail will automatically include the appointment in the personal Outlook Calendar of the employee,

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WATCH application security

WATCH provides a comprehensive system for user rights. As examples, for normal users, creat the group “Isers”, do the following:

1. Go to: Administration -> Groups and create the group “Users”
2. Go to: Settings -> Authorization Groups, select the group “Users”
3. Now you can make a selection of what member of the group “users”are allowed to do.
4. Go to: Administration -> employee, modify the group membership of each employee.

Easy project management

WATCH provides an easy project maintenance tool: Administration -> Project ++

In one screen a project manager and create/modify projects, project elements, assign resources and change the status.

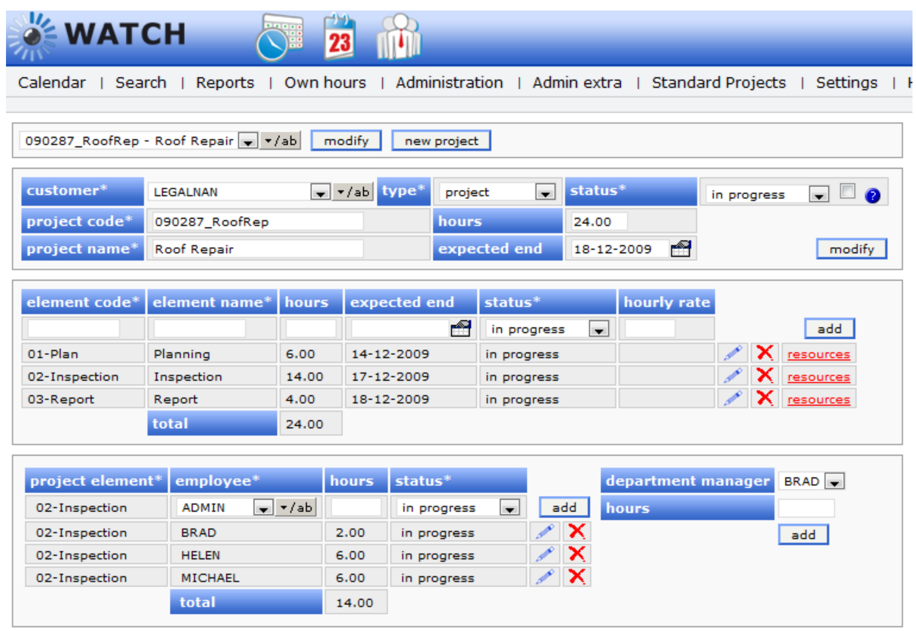

Figure 3 Project ++ overview