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Classic to Premier

The difference between TimeFox Classic and Premier is that Classic focuses on tracking what has happened up until now, while Premier deals with scheduling and what still needs to be done this week or month, to ensure that Projects are completed on time and resources are properly allocated.

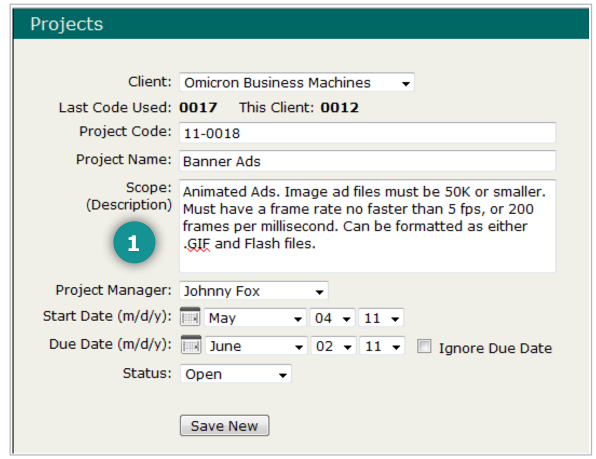
Workflow Begins with Entering a New Project.

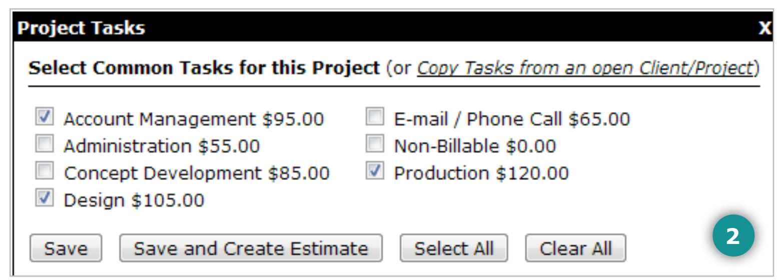
Assign a Project Code (job number) and Project Name. Scope is an optional field for Project details that can be shared among all users (deliverables, specs, other considerations).

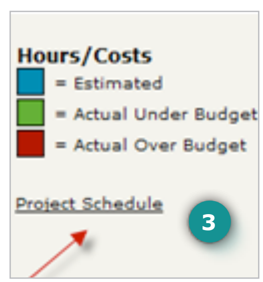
(1) Assigning a Project Manager, Start Date, and Due Date makes it easy to manage deadlines and responsibility for Projects.

(2) By selecting only the Tasks that you need on a Project from your common Task list, you simplify estimating, assigning Actions, and Timesheets.

(3) Click *Save and Create Estimate*. After filling out your hourly estimate for the new Project, click the Project Schedule link on the top right of the page.







Project Schedule

The Project Schedule page is where you can build and adjust all scheduling details for a Project.

Timeline
Here is the Timeline for this project. As you add in Milestones and Meetings, you will see them appear as events on the Timeline.

Project Info
This makes it easy to update the status of a Project, adjust the Due Date, or change any other details you may have entered when creating the Project.

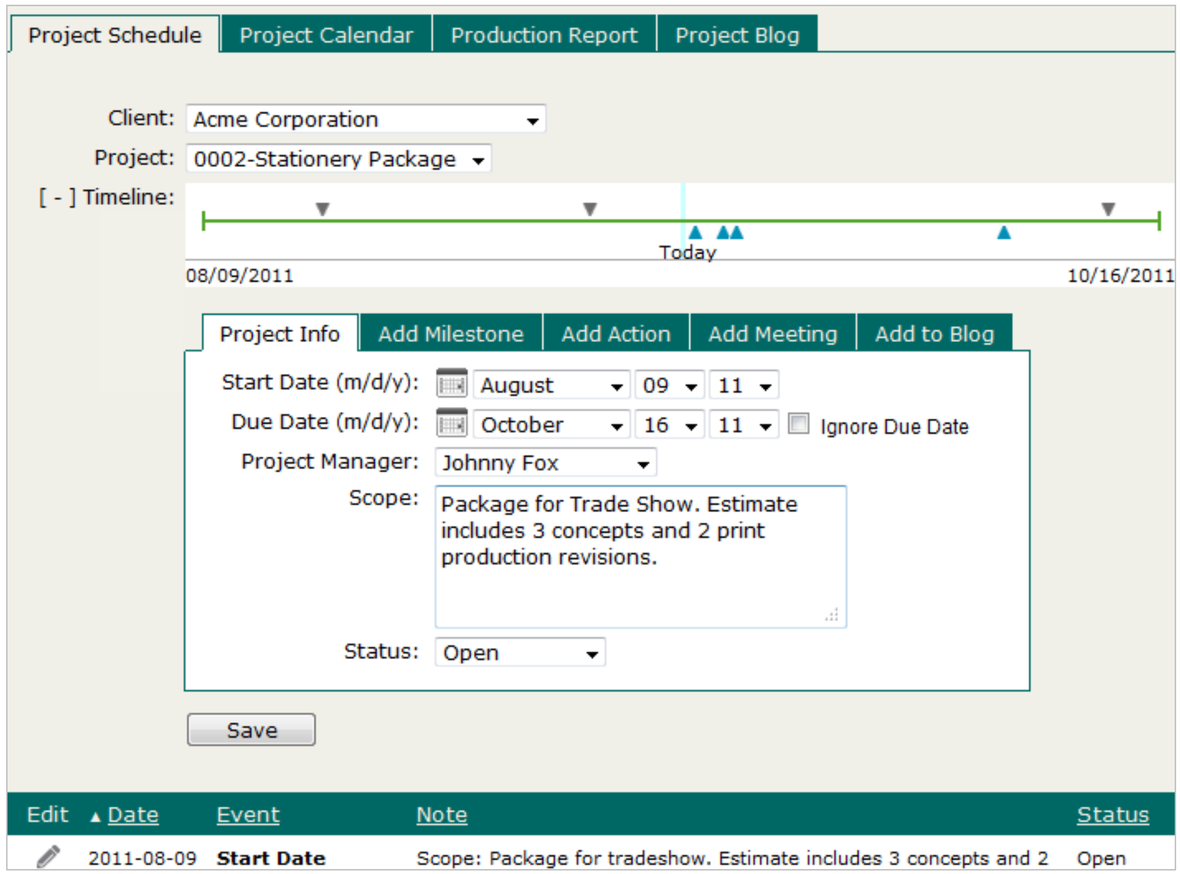
Add Milestone
These are date-specific events. Entering them here gives you a work-back schedule. There is also a note field to communicate additional details about that Milestone. Milestones have either an outstanding or complete Status, and you can choose to have Milestones complete automatically as they come due, or manually update them to Complete.

Add Actions
This lets you delegate Tasks by date and with individual estimates to a member of your team. Actions go on to the individual's To-Do List and Action Calendar.

Add Meeting
This relates to meetings that are specific to Projects; it appears in the Schedule and Project Calendar.

Select Meeting Invitees.
You can see the availability of each meeting at a glance. An automatic email alert goes to meeting attendees with an iCalendar option.

Add to Blog
Here you can paste creative specs and other Project details to improve collaboration.



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Action Assignment

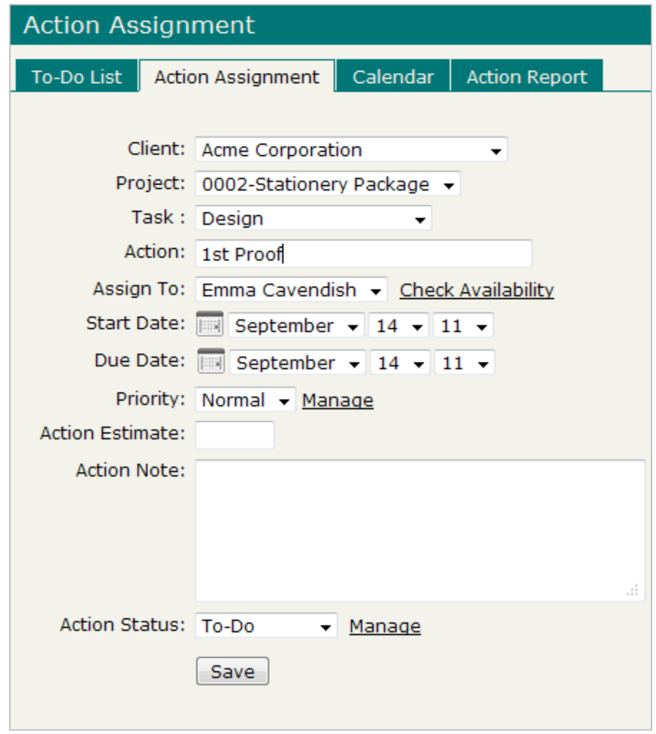
Use the *Action>Action Assignment* in TimeFox to assign Actions (To-Do list items) that need to be completed by specific members of your team. Select a Client and Project and Task. Type an Action item into the smart Action field.

Choose a personnel name from the pull down menu and select a Due Date for the Action. Assigning realistic Due Dates will make it easier for you and your team to prioritize workload and manage Actions. Choose an Action Priority from the pull-down list. You can customize and modify priorities using the Manage link.

Set an estimated amount of time for the Action. This is optional, but very useful. It helps make sure that Action Items are completed within a budgeted timeframe and that they are included when calculating availability.

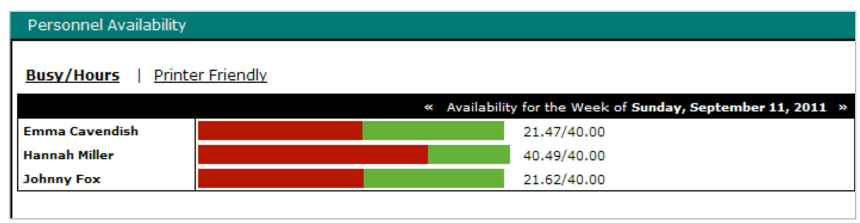
Add an Action Note for specific details relating to this Action. The default Action Status is To-Do. Click Save.

The Action will now appear below, associated with this Project, and on the appropriate To-Do List. You can also send an email alert to the assignee, informing them that an item has been added to their To-Do List.



Check Availability

Click Check Availability to see individual workloads. You will be able to see which team members are overloaded and which have time to take on additional tasks.



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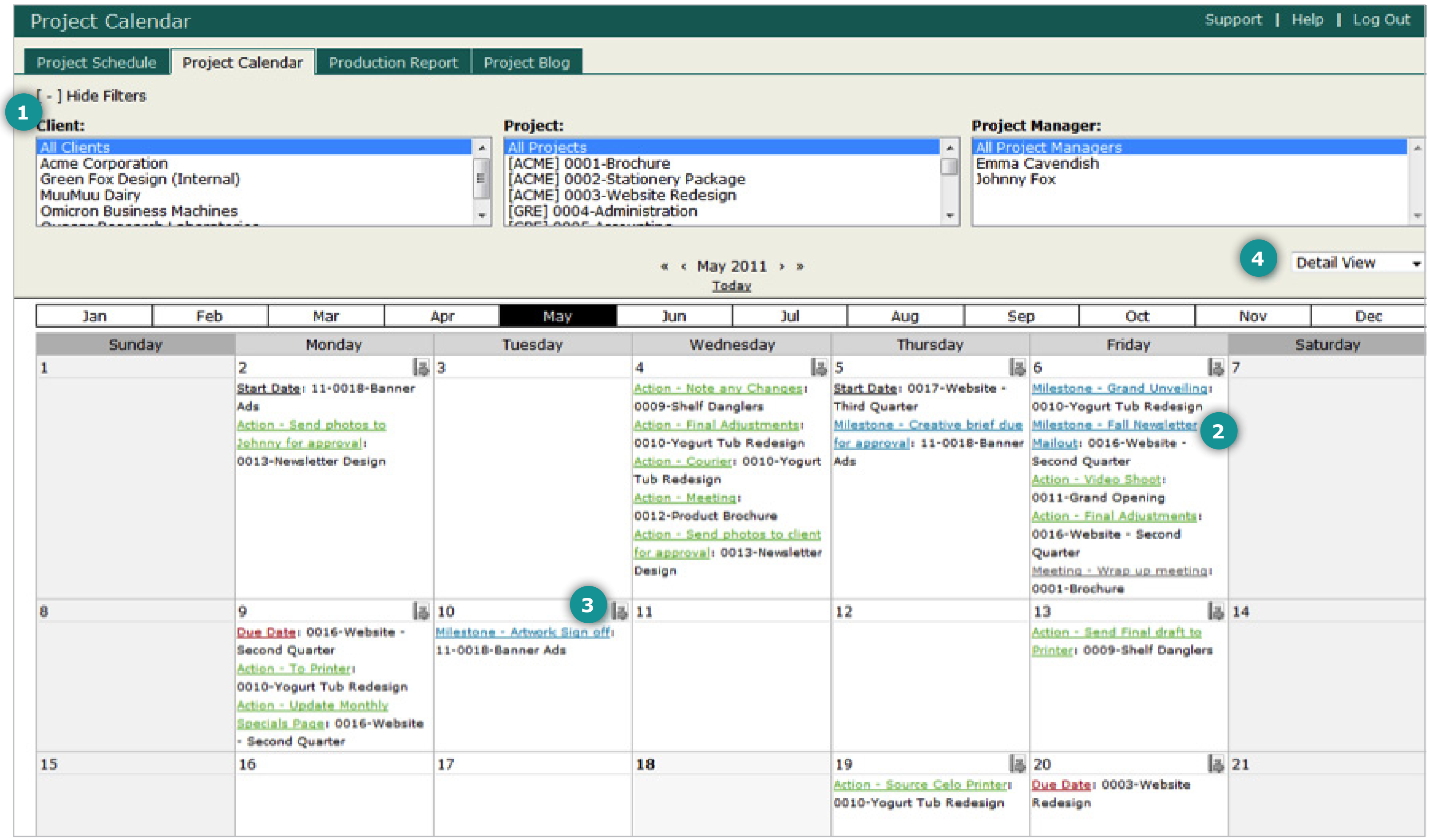
Project Calendar

The Project Calendar shows all Project Milestones, Meetings, Actions and Due Dates in one single calendar view. **(1)** You can filter the Project Calendar to show the specific Client, Project or Project Manager that you're interested in, or choose All Clients, All Projects to see everything. Milestones show in blue, Actions in green, Meetings in gray, and Project Due Dates in red. **(2)** Click on an event to see full details. **(3)** Drill down to a daily Production Report in one click using the Report icon at the top right of any date. **(4)** View the Project Calendar in detail or summary view.



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Production Report

The Production Report gives you all the Project details you need, including: Start Dates, Due Dates, Meetings, Milestones, and Actions. Choose a big-picture report or a more detailed report for a particular Client, and order it by Client or by Date. All items show the current Status: this is the report to use for your weekly traffic meeting.

Production Report

Print | Support | Log Out

Date: 05/01/2011 to 05/31/2011
Client: All Clients
Project: All Projects
Show: Milestones, Meeting, Action, Project Due Date, Notes
Group By: Client
Order By: Date

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Client: Acme Corporation

Event	**Date**	**Project**	**Status**
Project Meeting: Wrap up meeting	05/06/2011	0001-Brochure	Completed
From 10:00 AM to 12:00 PM Scheduled by Johnny Fox	Note: Last chance to make sure everything pops before we ship next week.		
Project Due Date	05/20/2011	0003-Website Redesign	Design
Project Manager is Johnny Fox.	Scope: New web identity to bring Acme brands into the 21 Century. Includes site architecture, wire-frame, design, UX testing and CMS implementation.		
Milestone: Final Client Sign Off	05/25/2011	0002-Stationery Package	Upcoming
	Client must approve all final versions of materials and sign off on deliverables.		

Client: MuuMuu Dairy

Event	**Date**	**Project**	**Status**
Milestone: Send Completed Concept to Printer	05/03/2011	0010-Yogurt Tub Redesign	Complete
	Get them rolling on a production tub		
Action: Note any Changes	05/04/2011	0009-Shelf Danglers	In Progress
Assigned to Johnny Fox Priority: High	Note: Any changes needed for all 3 concepts		
Action: Final Adjustments	05/04/2011	0010-Yogurt Tub Redesign	In Progress
Assigned to Johnny Fox Priority: Normal	Note: Any final adjustments		

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Actions and To-Do's

Lets go back to the Timesheet. Here we can see the most recent Actions assigned to Johnny Fox. He can click on the first Action item **(1)** to pull up all the information he needs to complete the Action and find out how much time he has. When he is ready to begin, he can click the arrow **(2)** to add the Action item to his timesheet. Then he just needs to start the timer and minimize the browser window before getting to work.

Notice that the Action Status **(3)** has been automatically updated to In-progress, so you can see which item he is working on. This updated Status shows on the Project Calendar, Production Report, Action Report and Project Schedule. When Johnny has finished working on it for the day, he can stop his Timer, and if he has completed the Action assigned, update the Status to Complete. He is now ready to move on to the next item. For a complete view of what Action items are upcoming and whether any Action items are overdue, click To-Do List **(4)**.

Timer	Edit	Delete	Client	Project	Task	Time	Description	▾ Entered On
			MuuMuu Dairy	0009-Shelf Danglers	Administration	0.25	Draft Estimate 1:40PM - 1:52PM	09/12/2011
			Quasar Research Laboratories	0013-Newsletter Design	Production	7.00	Samples, entry forms, suppliers	09/12/2011
Total						**7.25**		

Actions 4 To-Do List

Add	Action	Assigned By	Start Date	Due Date	Action Status	Hours
	Draft Estimate 1	Johnny	5/26/11	9/12/11	Complete	0.00
	Chat with Marge	Johnny	6/24/11	10/21/11	To-Do	0.00
	Second Round Revisions	Johnny	8/16/11	9/13/11	To-Do	0.00
2	Final Adjustments	Johnny	9/5/11	9/14/11	3 In Progress	0.00
	Various Correspondence	Johnny	5/20/11	10/21/11	To-Do	0.00

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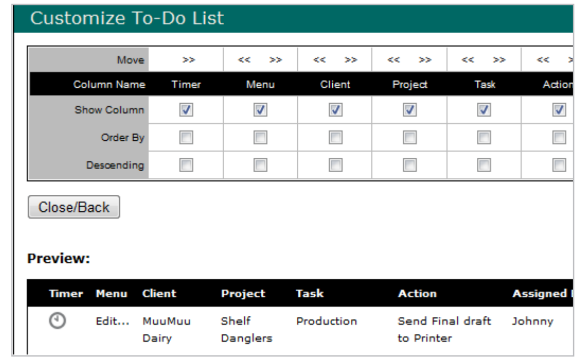
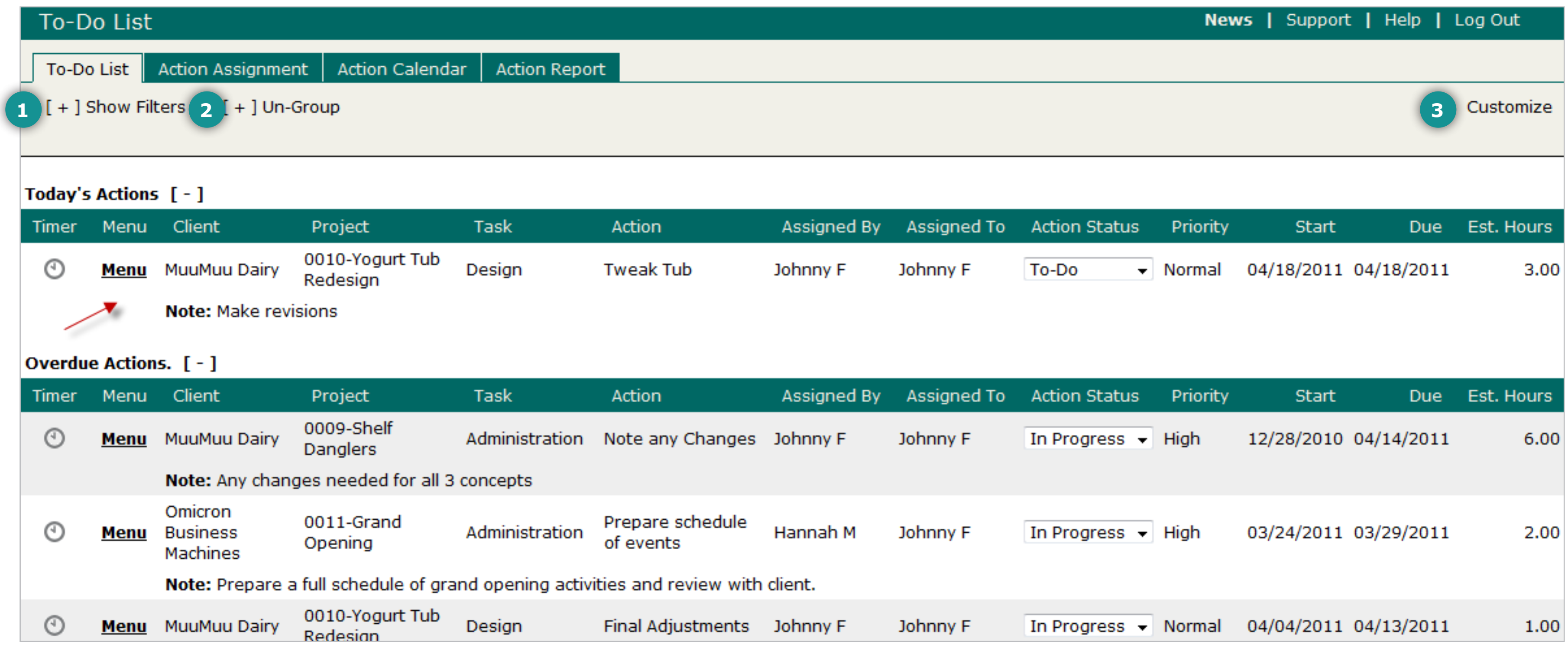
To–Do List

The To-Do List has filters **(1)** that allow Johnny to focus in on a particular Client, Project, Task or Priority. Actions can also be grouped **(2)** into Today's Actions, Overdue Actions, Upcoming Actions and Completed Actions.

Johnny can customize **(3)** this view, and the Timers on each Action tie directly to the Timesheet. If he is not using the Timer, he can click the Menu link and select *Add to Timesheet* to to add time to his Timesheet without leaving this page.

If Johnny has a question about a particular Action, he can click the menu link and select Add to Blog, then type his concern or update and send an email to the Project Manager or anyone else on the team who may be able to help. The email will tell them exactly what Client, Project and Action he is talking about. His question is also recorded in the Project Blog with a date and time stamp and Johnny's name. Let's go there now.





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Action Report

The Action Report is a detailed report that lets you see what all members of your team have on their plates, and the current Status of every Action. You can see at a glace all Action details including: Start Dates, Due Dates, Estimated Hours, Actual Hours, current Status and Notes. You can choose to view a big-picture or detailed report, and if you click Show Edit Links, you can edit items right from the online report. The Action Report gives you the information you need to plan your week, make sure everyone is up to date, and maximize productivity.

Action Report

Print | Support | Log Out

Date: 09/11/2011 to 09/18/2011
Client: All Clients
Project: All Projects
Show: Notes, Estimated Hours
Group By: Assignee
Order By: Date

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Assigned To: Emma Cavendish

Client	Project	Task	Action Due	Est. Hours	Action Status	Priority	Assigned By
MuuMuu Dairy **Action:** Staff meeting	0010-Yogurt Tub Redesign	Administration	09/15/2011 **Note:** Make sure we have all the notes from the meeting with Marge	2.00	To-Do	Normal	Johnny Fox
Quasar Research Laboratories **Action:** Follow up	0013-Newsletter Design	Account Management	09/13/2011 **Note:**	0.00	To-Do	Normal	Johnny Fox
MuuMuu Dairy **Action:** Various communications	0010-Yogurt Tub Redesign	E-mail / Phone Call	09/12/2011 **Note:** Why don't you take point on this one Emma!	9.00	To-Do	Low	Johnny Fox
MuuMuu Dairy **Action:** Courier	0010-Yogurt Tub Redesign	Administration	09/12/2011 **Note:** Ship First drafts to Marge	1.00	To-Do	Normal	Johnny Fox
MuuMuu Dairy **Action:** Launch Party	0010-Yogurt Tub Redesign	Non-Billable	09/12/2011 **Note:** Lets send the new tubs out in style!	4.00	To-Do	Normal	Johnny Fox
Subtotal for Emma Cavendish				**16.00**			

Assigned To: Hannah Miller

Client	Project	Task	Action Due	Est. Hours	Action Status	Priority	Assigned By
MuuMuu Dairy **Action:** Develop Initial Concept	0009-Shelf Danglers	Design	09/14/2011 **Note:** Work on your concept and ready it for first draft	4.00	To-Do	Normal	Johnny Fox
Subtotal for Hannah Miller				**4.00**			

Total	**20.00**

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Project Blog

The Project Blog is a communication tool that allows users to exchange and store Project Information in one central place.

People can enter comments about a Project, or about specific Action items from the To-Do List. People can also email comments to team members from the Blog for instant communication, while providing a complete history of interaction about a project.

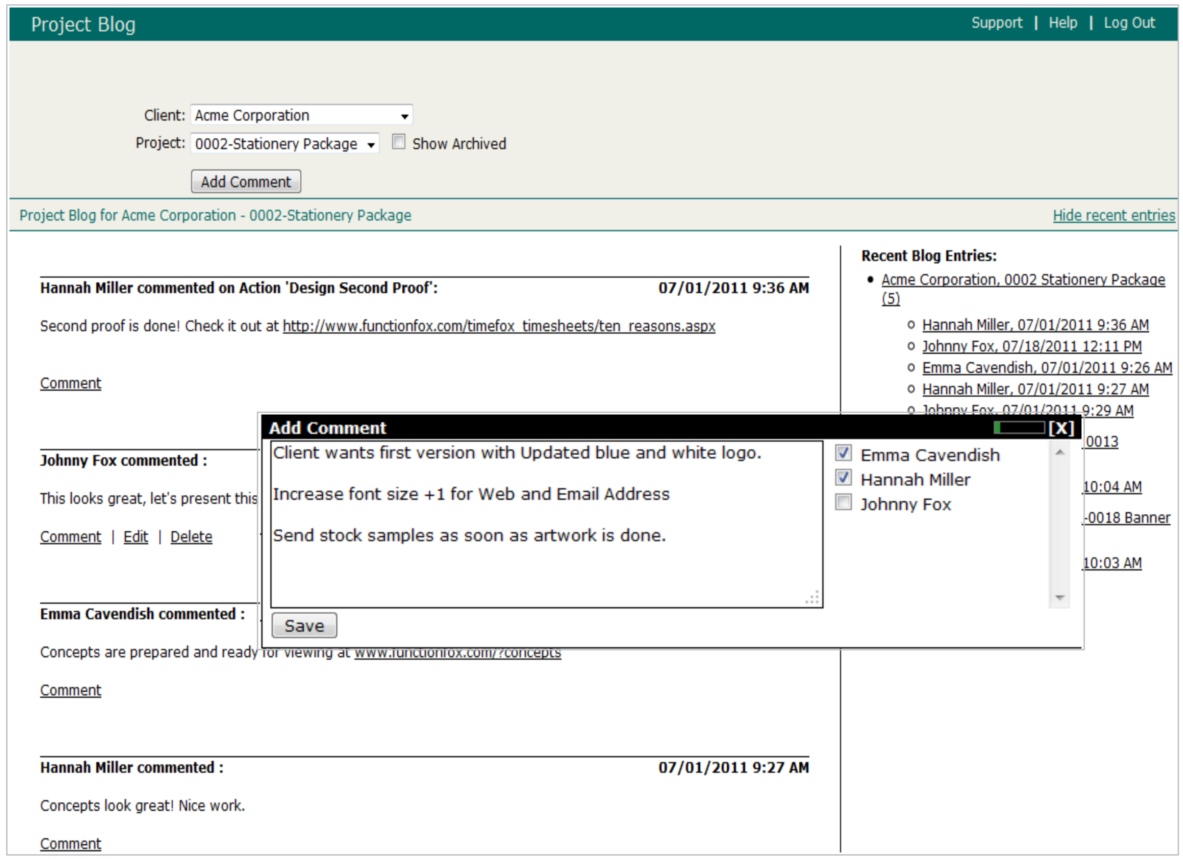
It's a good idea to put the full Creative Brief details in the Blog so everyone on the team has the same information. If the client calls with a change, it is quick and simple to add a comment and email the team with the new information.

All updates, changes and comments are centralized and available to everyone.

Click Recent Blog Entries to see Projects with recent Blog updates, including who made the comment and the date and time of the entry.

Blog history is archived when you close Projects, and so is easily accessible if you want to refer to an older Project. It also shows you exactly who worked on the last Project and any specifications, comments or issues that occurred.

You can paste in links into the Blog, to make other documents or relevant web locations available. This is team collaboration at its best.



TimeFox Alerts

(1) ***Setup>My Account>My Preferences*** is where you can establish which email alerts your team will receive. When you are getting started TimeFox, it's easy to get your team on board and up to speed with a quick email to alert them to the Actions they need to complete. Once they are familiar with Actions and with working from the To-Do List, they may choose to shut the email Action alert off. This alert for new Actions also works well for team members who may only have one or two Actions a week, as they will not be watching their To-Do List closely. If you choose to receive an alert when an Action is due, an email will be in your inbox on the morning of the day it is due. To allow meetings scheduled in TimeFox to be downloaded to your iCalendar, check '*I am invited to a meeting*'.

(2) Estimate Alerts Once the Actual Hours spent on a job reach the percentage of estimated hours selected on Setup>Estimate for the Project, TimeFox will insert an entry into the Blog stating that this job has reached the preset percentage. **Email Estimate Alert** Check this option, to have an automatic email sent to the Project Manager, notifying them that their Project has reached the preset percentage of Estimated Hours for the Project.

To activate these features, go to *Setup>My Account>Account Preferences>Alerts* and choose the percentage of estimated hours reached on a Project. This feature makes helps your team avoid running over budget on Projects.