Overview

Welcome to FunctionFox Premier! Premier features project management tools, such as project scheduling, to help you manage what needs to be done to ensure that projects are completed on time and resources are properly allocated. Please refer to the FunctionFox Help Center > Day-To-Day series for additional resources.

Questions? Give us a call at 1.866.369.8463 or email staycreative@functionfox.com.
PROJECT SCHEDULE

The Project Schedule page allows you to easily view and add all milestones, actions, and meetings related to a project.

Adding Items

1. Go to Traffic > Project Schedule
2. Select your desired item tab:
   - **Add Action**: Actions are used to breakdown Tasks into ‘actionable’ work assignments assigned to specific team members. Assigned actions will appear on each users To-Do List for them to work off of on a daily basis.
   - **Add Milestone**: Create/edit milestone points to mark significant events within the life of a Project (e.g. deadlines, phase beginnings, etc.)
   - **Add Meeting**: Schedule meetings for the project (to track time against the meeting you may also want to create an action for the meeting)
3. Enter the **item details** (e.g. Action; action, description, due date, etc.)
4. Click **Save New**

**Project Info Tab**: you can edit/update information pertaining to the project including: Start/Due Dates, Project Manager, Scope, Status, Project Type, and any Custom Field.

Editing Items

1. Go to Traffic > Project Schedule
2. Click on the edit pencil (📝) in the table
3. Make your desired **changes**
4. Click **Save Edit**
Shifting Items

In the event that a project needs to be placed on hold or extended, this tab allows you to shift all Actions, Milestones, and Meetings by a select number of days).

1. Select the shift from date (this will only move items on or after the selected date).
2. Enter in how many days to shift items forward, and check “Avoid weekends” to automatically adjust items that fall on the weekend after the shift.
3. Select which items to shift.

FOX TIP: enter a negative number of days if you’re looking to shift your schedule backwards (e.g. –5 days).

Timeline

You can turn on/off a visual timeline of the project by clicking on the [+ or [-] link beside Timeline. The timeline shows the full span of the project as a green timeline bar, where milestones are marked with blue arrows, and meetings are marked with grey arrows.

Today’s date is indicated by a blue vertical line along the timeline. The timeline is not for the entry or modification of events, it is simply a graphical view of the project schedule.

LEARN MORE

You can learn more about adding Actions the article Assigning Action.
TO-DO LIST

As Actions are assigned to the team, each person’s Actions will populate their own personal To-Do list.

Using the To-Do List

1. Go to Timesheet > To-Do List

2. Use the Filters to refine your view of actions by Client, Project, Task, Assigned From/To, Priority, or Status. Additionally you can use the text search to find a specific key word(s) within each listed Action.

3. By default your To-Do List will be Grouped. If you wish to view your actions un-grouped, you can do so by clicking on [+ Group button.

   - Today’s Actions: actions that are due today.
   - Overdue Actions: actions that have passed their assigned due date without being marked as “Complete”.
   - Upcoming Actions: actions that are within their due date.
   - Recently Completed Actions: actions that have been completed within the last three weeks.

4. You can track time against any action item assigned to you on the To-Do List by clicking on the clock icon (⏰) or by clicking on Menu > Add to Timesheet to manually enter time.

LEARN MORE

You can learn more about the To-Do List from the article Using the To-Do List.
CALENDARS

Along with the Personal and Group Calendars, Premier also comes with an Action Calendar, and Project Calendar (Traffic > Calendars).

Action Calendar

The Action Calendar gives you a visual monthly or weekly view of all your outstanding and completed actions for a given day. Use the drop-down menu at the top right to view actions assigned to All Personnel, or to filter on a specific user.

![Action Calendar Example]

Project Calendar

The Project Calendar shows all scheduled events (Milestones, Meetings, Actions, etc.) in either a monthly or weekly view.

![Project Calendar Example]

You can add items to a project by clicking on the plus icon (+).

Use the filters, to view items relating to specific clients and projects, as well as by project manager, project status, or project type.

Make edits to any item by dragging and dropping assigned Actions, Milestones, and Meetings or click on them to access the edit modal.
PROJECT BLOG

The Project Blog is a communication tool that allows users to exchange and store project information in one central place. Keep your team updated, collaborate, add files, and notify each other of changes.

Adding Blog Posts

1. Go to Traffic > Blog
2. Select a Client and Project
3. Click on the Add Comment button
4. Enter your desired entry in the comment area, then click Save

Should you wish to notify personnel by email of your comment, click on the mail icon mail and select the people you wish to notify (emails will be sent to the address associated with their login profile).

Uploading Files

There are two ways in which new files can be uploaded and posted to the blog for a project:

1. Through the "Upload Files" button you can quickly add in new files to be associated with a project and posted to the blog. Click on the "Upload Files" button, then select a file by clicking on the "Choose File" button, then click "Upload".

2. Through the "Add Comment" modal (or in response to another comment), click on the Files modal layer at the top, then upload or insert any files to your post by clicking on the 'Insert Link' icon (ｶﾞ＋).
Other Blog Features

Replies
Replies can be made against a comment by clicking on the Comment Button below an existing post.

Recent Blog Entries
Recent Blog Entries can be accessed from the right hand panel on the Blog page. Clicking on a recent entry will navigate you to the post and highlighting it within the comment feed.

LEARN MORE
You can learn more about the project blog from the article Project Blog.
ALERTS

FunctionFox Premier comes equipped with additional alerts to help you keep on top of what is happening with your projects.

Alerts Overview

Estimate and Retainer Alerts

Use the Estimate or Retainer Alert to notify project/retainer managers when the project or retainer reaches the set threshold.

1. Go to Settings & Preferences > Account Preferences
2. Scroll down to Alerts
3. Select your desired Estimate or Retainer alert thresholds

<table>
<thead>
<tr>
<th>Alert Type</th>
<th>Select Option</th>
<th>75%</th>
<th>90%</th>
<th>80%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimate Alert</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retainer Alert</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. After you have your Estimate or Retainer alert thresholds selected, go to My Preferences
5. Scroll down to Alerts
6. Enable the alerts:
   - Actual hours have reached specified % of estimate
   - A retainer that I’m manager of has reached specified %

Other Premier Alerts

- A new action is assigned to me
- I assign a new action to myself
- An action is due
- An action assigned to me has been updated
- An action was completed *(project manager only)*
- A Milestone is due *(project manager only)*