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User Guide - Infotech Project Planning

Welcome to Infotech Project Planning

This comprehensive project planning solution enhances Microsoft Dynamics 365 Business Central with advanced project management capabilities, enabling you to plan, track, and manage project activities across different departments and roles.

Getting Started

What is Infotech Project Planning?

Infotech Project Planning extends Business Central's standard Project functionality with:

- **Hierarchical Planning Structure**: Organize activities into logical areas and steps
- **Role-Based Dashboards**: Customized views for Sales, Production, and Service teams
- **Automated Workflows**: Trigger next steps automatically upon completion
- **Resource Management**: Assign and track team member responsibilities
- **Integration Ready**: Connect with Power Automate for advanced automation

Who Should Use This Guide?

- **Project Managers**: Plan and oversee project execution
- **Team Members**: Track and update assigned tasks
- **Department Heads**: Monitor team performance and resource utilization
- **System Administrators**: Configure and maintain the system

Navigation and Access

Finding Project Planning Features

1. **Search Function**: Use the search icon (🔍) and type:
   - "Project Planning" - Access main planning pages
   - "IPP Setup" - Configuration settings
   - "Planning Activities" - Dashboard views
2. **Project Card Integration**: Open any Project Card to see the integrated Project Planning subform
3. **Role Centers**: Access planning activities directly from your role center dashboard

Main Pages Overview

Page	Purpose	Users
Project Planning Steps	Configure planning templates	Administrators
Project Planning Activities	Monitor progress dashboard	All users
Project Planning Subform	Manage project-specific planning	Project managers
IPP Setup	System configuration	Administrators

Core Concepts

Planning Areas

What are they? Top-level containers that group related planning steps by department or function.

Examples:

- Sales Activities (client meetings, proposals, contracts)
- Production Activities (design, development, testing)
- Service Activities (installation, training, support)

Planning Steps

What are they? Individual tasks or milestones within a planning area.

Key Properties:

- **Description**: What needs to be done
- **Sort Order**: Sequence within the area
- **Indentation**: Visual hierarchy level
- **Due Date Formula**: Automatic scheduling
- **Assigned Resource**: Who is responsible

Project Planning Entries

What are they? Actual instances of planning steps linked to specific projects.

Lifecycle:

1. **Created**: Step added to project
2. **Started**: Work begins (auto-timestamps)
3. **In Progress**: Ongoing work
4. **Completed**: Task finished (triggers next step)

Step-by-Step User Workflows

For Project Managers

Creating a New Project Plan

1. **Open Project Card**

- Navigate to Projects
- Open existing project or create new one
- Scroll to "Project Planning" section

2. **Add Planning Steps**

   - Click "New" in the Project Planning subform
   - Select planning step from dropdown
   - System auto-fills area, sort order, and indentation
   - Set due date (or use formula)
   - Assign resource

3. **Configure Timeline**

   - Review auto-calculated due dates
   - Adjust dates as needed
   - Consider dependencies between steps

4. **Assign Resources**

   - Select from available resources
   - Ensure proper workload distribution
   - Consider skill requirements

Monitoring Project Progress

1. **Use Planning Activities Dashboard**

   - Access from role center or search
   - View real-time activity counts
   - Drill down into specific areas

2. **Review Project-Specific Progress**

   - Open Project Card
   - Check Project Planning subform
   - Monitor completion status
   - Review resource assignments

3. **Track Completion Rates**

   - Green indicators = completed
   - Yellow indicators = in progress
   - Red indicators = overdue

For Team Members/Resources

Viewing Your Assignments

1. **Access Your Tasks**

   - Use Planning Activities dashboard

- Filter shows only your assignments
- See across all projects

2. **Understand Task Details**

   - Click on activity counts to drill down
   - Review project list filtered to your tasks
   - Check due dates and priorities

Updating Task Status

1. **Mark Tasks as Started**

   - Open Project Card or planning subform
   - Check "Started" field
   - System records start timestamp

2. **Add Progress Notes**

   - Use "Quick Notes" field for updates
   - Keep stakeholders informed
   - Document key decisions

3. **Complete Tasks**

   - Check "Complete" field when finished
   - System records completion timestamp
   - Next step automatically activated (if configured)

For Department Heads

Monitoring Team Performance

1. **Use Role-Based Dashboards**

   - Access planning activities for your area
   - Monitor team workload distribution
   - Identify bottlenecks

2. **Resource Utilization**

   - Review assignment patterns
   - Balance workloads across team
   - Plan resource allocation

3. **Performance Metrics**

   - Track completion rates
   - Monitor timeline adherence
   - Identify improvement opportunities

Advanced Features

Power Automate Integration

What it does: Automatically triggers external workflows when tasks are completed.

Common Uses:

- Send email notifications
- Update external systems
- Create follow-up tasks
- Generate reports

Setup Requirements:

1. Configure Power Automate flow
2. Copy trigger URL
3. Enter URL in planning step configuration
4. Enable triggers in IPP Setup

Custom Project Filters

Purpose: Limit which projects appear in specific planning steps.

Examples:

- Customer-specific filters: `Customer No.: C001..C999`
- Date-based filters: `Posting Date: 01/01/2024..12/31/2024`
- Status filters: `Status: Open|Planning`

Configuration: Enter filter expression in planning step setup.

Resource Filtering

Purpose: Personalize dashboard views to show only relevant assignments.

Setup:

1. Go to User Setup
2. Find "Resource No. Filter" field
3. Enter your resource number or pattern
4. Save changes

Tips and Best Practices

Planning Setup Tips

1. **Start Simple**
   - Begin with basic planning areas
   - Add complexity gradually
   - Train users incrementally
2. **Consistent Naming**

- Use clear, descriptive step names
- Follow naming conventions
- Avoid abbreviations

3. **Logical Sequencing**
   - Order steps chronologically
   - Consider dependencies
   - Allow for parallel activities

Daily Usage Tips

1. **Regular Updates**
   - Update status daily
   - Use quick notes effectively
   - Communicate changes promptly

2. **Dashboard Monitoring**
   - Check dashboard at start of day
   - Prioritize overdue items
   - Balance workload

3. **Collaboration**
   - Communicate with team members
   - Share progress updates
   - Escalate issues early

Performance Tips

1. **Keep Data Current**
   - Complete old entries
   - Archive finished projects
   - Clean up test data

2. **Use Filters Effectively**
   - Set appropriate resource filters
   - Use project filters to limit scope
   - Optimize dashboard performance

Troubleshooting

Common Issues and Solutions

"I don't see any planning activities"

Possible Causes:

- No planning areas configured for your role center
- Resource filter too restrictive
- No projects assigned to you

Solutions:

- Contact administrator to verify setup
- Check user setup resource filter
- Verify project assignments

"Planning steps don't appear in dropdown"

Possible Causes:

- No planning steps configured
- Steps not assigned to correct planning area
- Indentation issues

Solutions:

- Verify planning step configuration
- Check planning area assignments
- Review indentation settings

"Next step doesn't activate automatically"

Possible Causes:

- Next step not configured
- Planning step setup incomplete
- System permissions

Solutions:

- Check "Activate Next Step" field in planning step
- Verify planning step exists
- Contact administrator for permissions

"Dashboard shows wrong counts"

Possible Causes:

- Data synchronization delay
- Filter conflicts
- Cached data

Solutions:

- Refresh page (F5)
- Clear filters and reapply
- Contact administrator if persistent

Getting Help

1. **Built-in Help**
    - Use F1 key for context-sensitive help
    - Hover over fields for tooltips
    - Check field descriptions
2. **System Administrator**
    - Configuration issues
    - Permission problems
    - Performance concerns
3. **Training Resources**
    - User training sessions
    - Documentation library
    - Best practices guides

Keyboard Shortcuts

Shortcut	Action
F1	Context-sensitive help
F5	Refresh page
Ctrl+N	New record
Ctrl+S	Save
Ctrl+F	Find/Search
Alt+F4	Close page

Glossary

Planning Area: Top-level grouping of related planning steps, typically by department.

Planning Step: Template definition of a task or milestone that can be added to projects.

Project Planning Entry: Actual instance of a planning step assigned to a specific project.

Resource: Person who can be assigned to planning steps (from Resource table).

Sort Order: Numeric value determining the sequence of steps within an area.

Indentation: Visual hierarchy level (0 = area header, >0 = steps).

FlowField: Calculated field that shows aggregated data from related tables.

Role Center: Department-specific dashboard and navigation area in Business Central.