

5 Year and 12 Month Project Plans



5 Year and 12 Month Project Plans

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Introduction

Overview

The 5 Year Plan and 12 Month Project Status plan solutions are a series of custom forms, application rules and custom columns that can provide a visual representation of project plans and status.

You can view a video of this in action at <http://youtu.be/uJgNVaHYIzE>

The Five Year Plan

The screenshot displays the '5 Year Plan : FirstClass Demo' window. The main area shows a list of projects with columns for 'CUR YEAR', 'NEXT YEAR', 'YEAR 3', 'YEAR 4', 'YEAR 5', and 'NO SCHED'. A blue bar indicates the active year for each project. The 'Mathematics Curriculum Review' project is selected, and its details are shown in a separate window.

Project	CUR YEAR	NEXT YEAR	YEAR 3	YEAR 4	YEAR 5	NO SCHED	Type
Mathematics Curriculum Review	Active						Curriculum
Johnson Heights Middle School		Active					Operations
Johnson Heights Middle School			Active				Operations
Custodial Restructuring				Active			Operations
Board Office Network Upgrade					Active		Operations
Cad Lab Upgrade						Active	Operations
Elementary Mac Lab Upgrade							Operations
Network Upgrade							Operations
Reforestation of Board Office							Operations
Seismic Upgrade							Operations

The 'Mathematics Curriculum Review : FirstClass Demo' window shows the project details, including the project name, category, and a timeline for the next five years. The timeline shows the project is active in the current year and next year.

The 5 Year Plan conference type and document displays the timeline for a particular project over the course of 5 years. The conference list view displays a blue indicator bar in the year that the particular project is active. The project document can contain more detailed information.

The 12 Month Project Status

The screenshot displays two windows from the FirstClass Demo application. The main window, titled 'Current Project Status : FirstClass Demo', shows a '12 Month Project Plan and Status' for a 'Conference' type project. It lists four projects: 'Mathematics Curriculum Upgrade', 'Board Office Network Upgrade', 'Mac Lab Upgrade', and 'New Document'. Each project has a timeline of icons representing its status over the months of the year. The 'Mathematics Curriculum Upgrade' project is selected, and a secondary window provides a detailed view of its timeline.

12 Month Project Plan and Status

Conference 4 Files 0 Folders FirstClass Demo : Emily Heidrich 49G Free

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www.firstclass.com

Project: JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN Type

Project	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Type
Mathematics Curriculum Upgrade	Planning	Planning	Planning	Planning	Planning	Planning	Planning	Planning	Planning	Planning	Planning	Planning	Curriculum
Board Office Network Upgrade	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Technology
Mac Lab Upgrade	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Technology
New Document	Completion	Completion	Completion	Completion	Completion	Completion	Completion	Completion	Completion	Completion	Completion	Completion	Maintenance

1 item selected.

Mathematics Curriculum Upgrade : FirstClass Demo

File Edit Format Message Collaborate View Help

Save and Close Find Check Spelling Print Delete History

Project: Mathematics Curriculum Upgrade

Project Category: Curriculum

Month	Status	Month	Status	Month	Status
July	N/A	Nov	N/A	Mar	N/A
Aug	N/A	Dec	N/A	Apr	Plan
Sept	N/A	Jan	N/A	May	Plan
Oct	N/A	Feb	N/A	Jun	Plan

Review of the K-12 curriculum to bring in to alignment with NCTM standards. Planning committee to be established this spring with committee work to begin in the fall

100%

The 12 Month Project Status conference type and document displays the timeline for a particular project over the course of a year. The conference list view displays an icon indicator for each month that the project is active. The icon represents one of four different project stages; Planning, Implementation, Maintenance or Completion. The project document itself can contain more detailed project information.

Installation and Configuration

Installing the Files

The installation requires the processing of a series of batch scripts and associated files that will create the content on your FirstClass server, allowing you to utilize this unique application of FirstClass rules and custom forms.

Resources Used

C:\Users\slynch\Desktop\12 Mo Plan.rez

Description	ID	Size	Type	CRC
Local Form				
Document Form				
12 Month Plan	2002	2890	User Forms	2eb8a040
Registered Form				
Database Query				
Database HitList				
Reserved				
Picture				
Icon				
JUL	20002	744	Icons	0610-257
AUG				
SEP				
OCT				
NOV				
DEC				
JAN				
FEB				
MAR				
APR				
MAY				
JUN				
Plan				
In Progress				
Maintenance				

C:\Users\slynch\Desktop\Install Project Planner\5 Yr Plan.rez

Description	ID	Size	Type	CRC
Local Form				
Document Form				
5 Year Plan	2100	911	User Forms	39466701
Registered Form				
Database Query				
Database HitList				
Reserved				
Picture				
Icon				
CUR YEAR	28675	1514	Icons	7f0f990b
NEXT YEAR	28676	1514	Icons	80d891fd
YEAR 3	28677	1514	Icons	3785035a
YEAR 4	28678	1514	Icons	1c2458e2
YEAR 5	28679	1514	Icons	685bc6b2
UN SCHEDULED	28680	1514	Icons	ec9b3ac7
BAR	28682	2120	Icons	ef72f8ac

Before you install, you should be aware of the different resources used for each of the two types of conferences. You will want to make sure that the custom project resources do not overwrite custom resources of the same ID that you may already be using on your system.

5 Year Plan

Form ID 2100

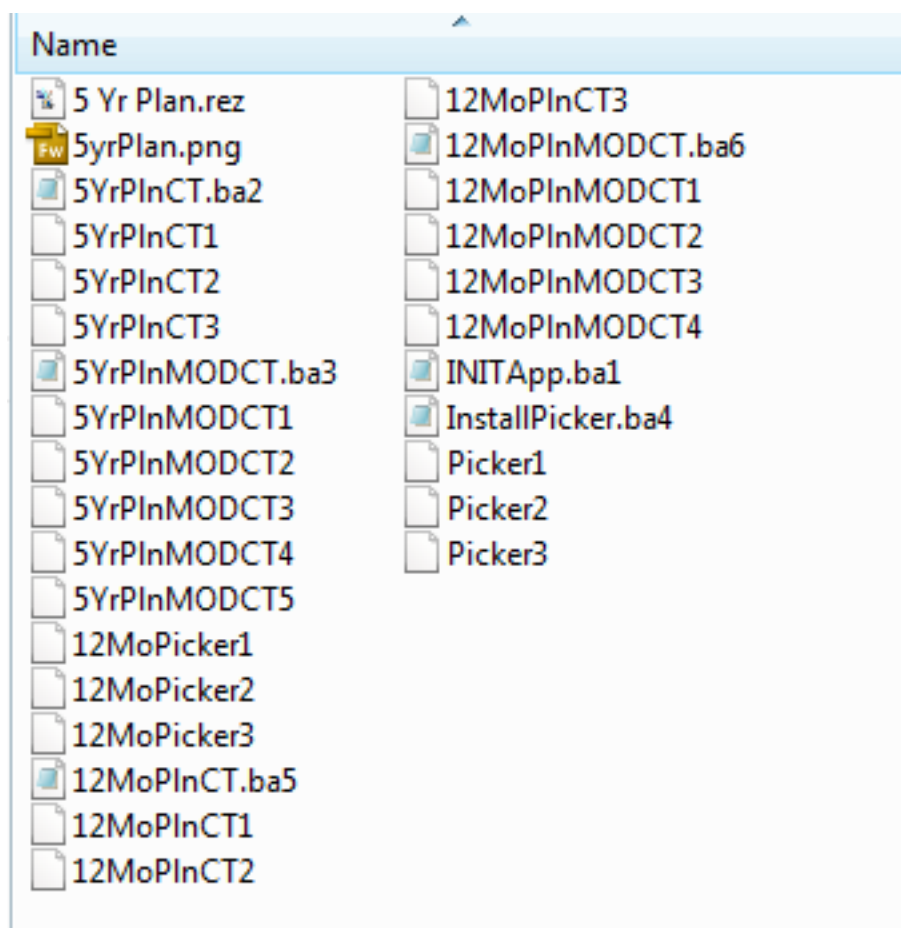
7 Icons: 28675-28680,28682

12 Month Project Plan

Form ID:2002

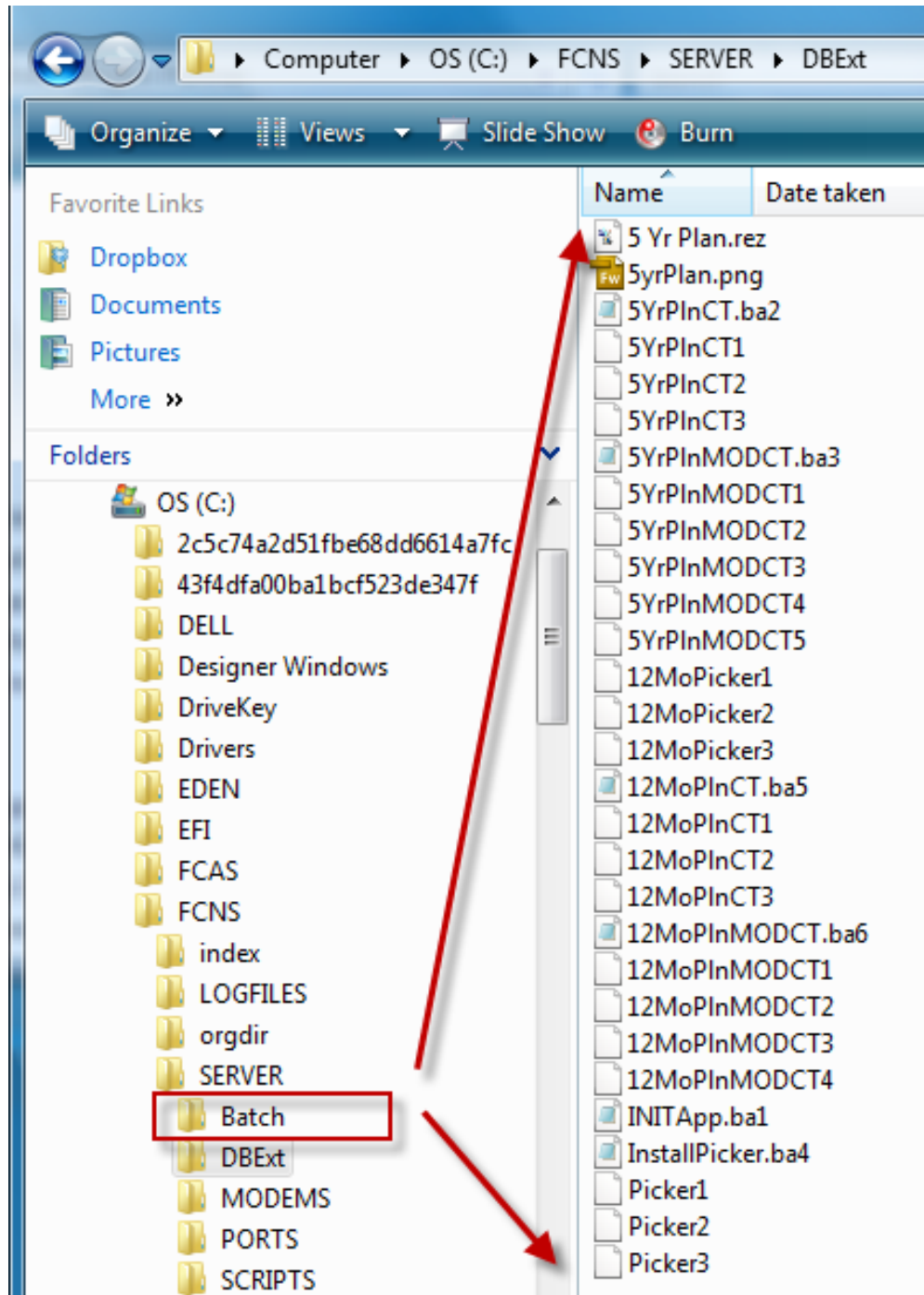
15 Icons: 28683-28697

Expand the Zipped archive



- Expand the **Install Project Planner.zip** archive and select all of the items inside the folder

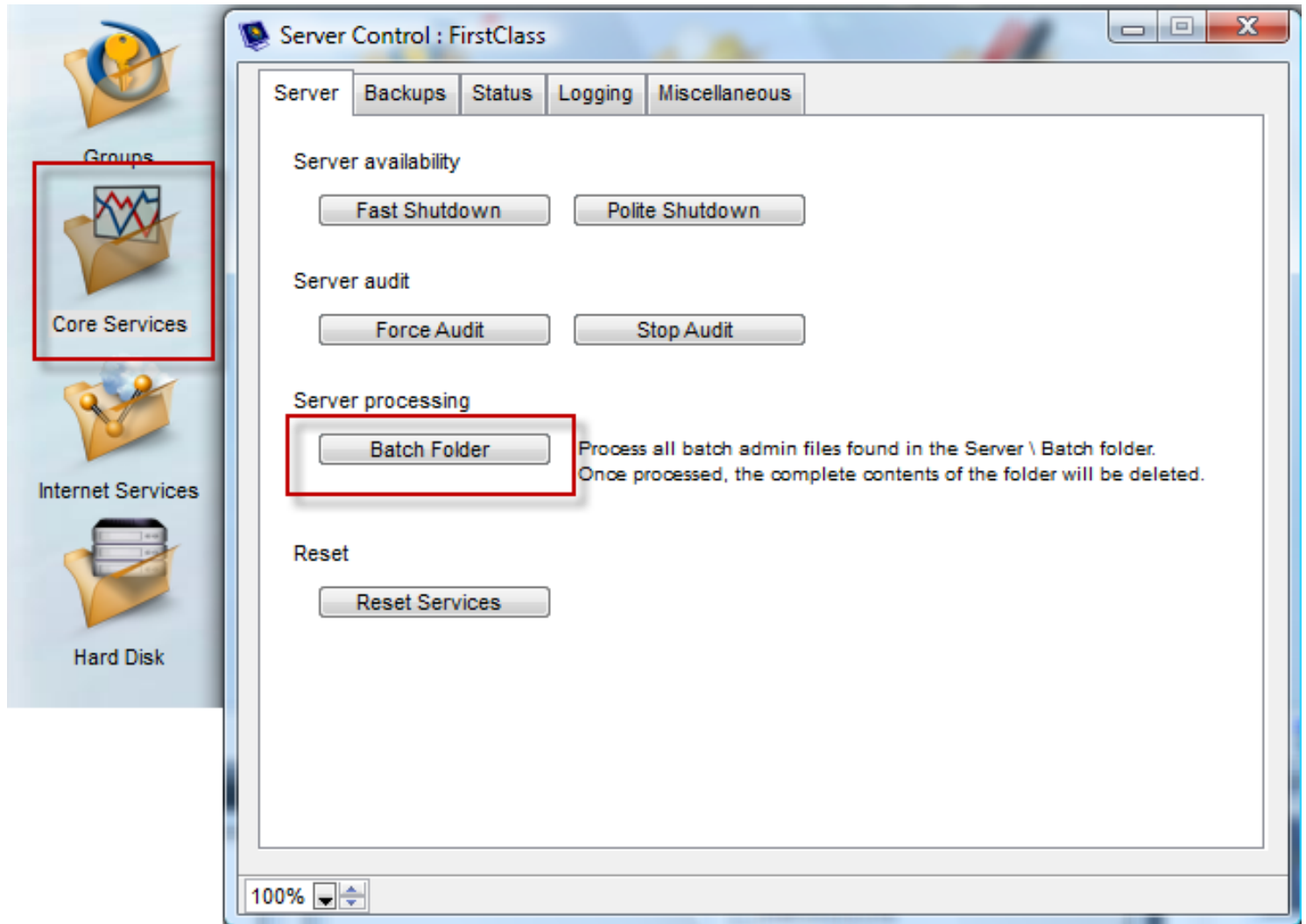
Copy to Batch Folder



- Copy all of the files selected in the previous step and move the copies in to your **FCNS\Server\Batch** folder.

On a Mac, this folder path is in **\Library\FirstClass Server\Volumes\Master\FCNS\Server\Batch**

Processing the Batch Files



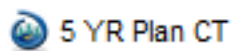
- Log in as Admin
- Open the Server Control application inside your Core services folder
- Click on Batch Folder.

This will process the installer batch files

Reviewing Installed Components

Once you have completed the installation, you should review the installed components.

4 New Container Template Groups



5 YR Plan CT



5 YR Plan MOD CT



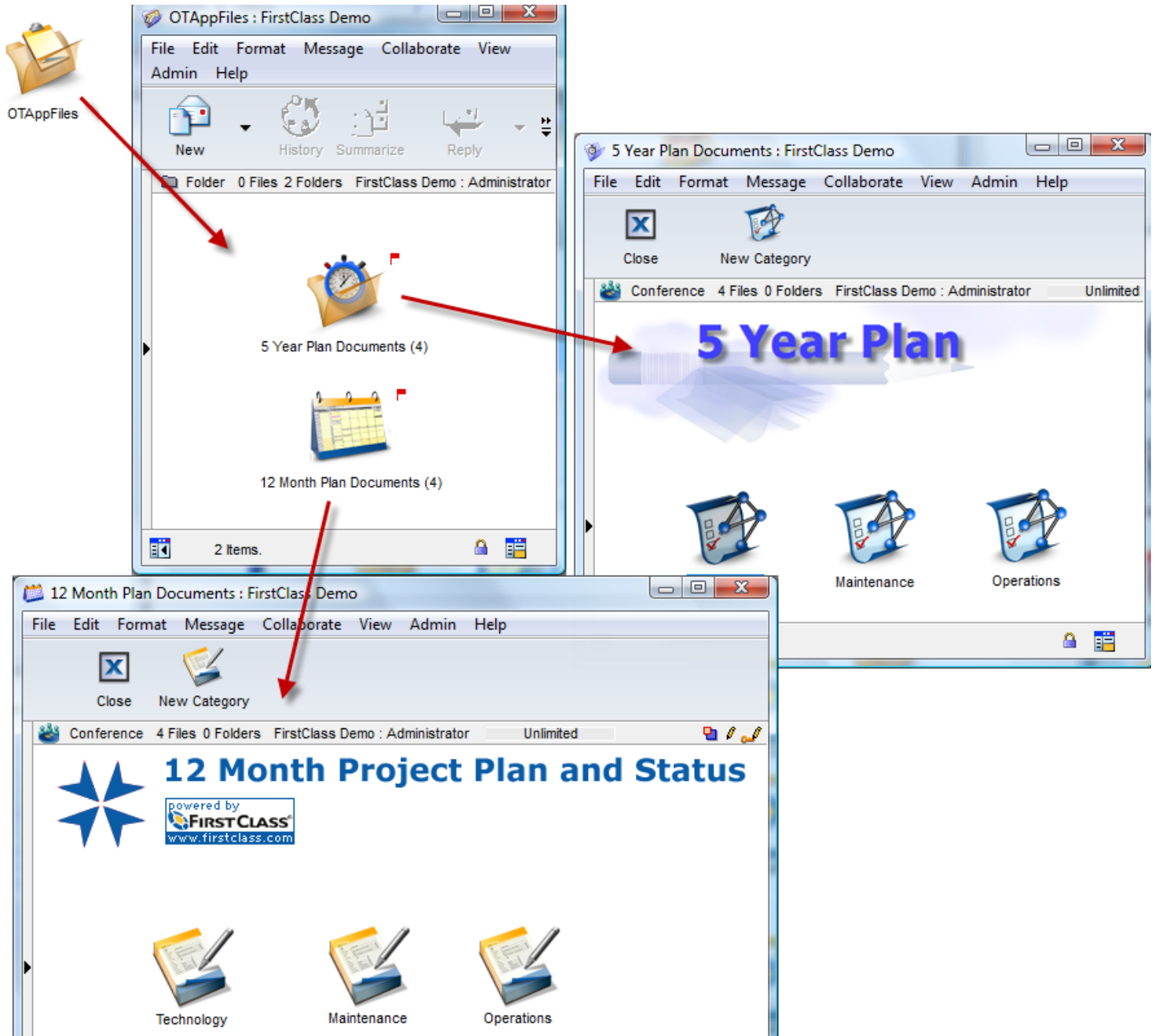
12 Mo Plan CT



12 Mo Plan MOD CT

The installer creates 4 container template groups. Two for each of the different conference types. You will soon learn how to create a conference that will be your 5 Year or 12 Month Project type of conference. Each of the two types will inherit the permissions based on the two corresponding container templates. One is the view that is displayed to non moderators, and the other is for the conference moderator

2 new Document Picker Folders



When the moderator creates a new project, he/she is presented with a choice of different document types. These selections are stored in the **FirstClass Applications/OTAppFiles/5 Year Plan Documents** or **FirstClass Applications/OTAppFiles/12 Month Plan Documents** folders on the Admin desktop. You will learn later how you can modify, add or delete project types.

Creating a 5 Year Plan Conference

Now that the components are installed, you can create as many 5 year plan conferences as you like. Each site or department can have its own 5 year plan conference and each one can have its own set of moderators.

Create a New Conference

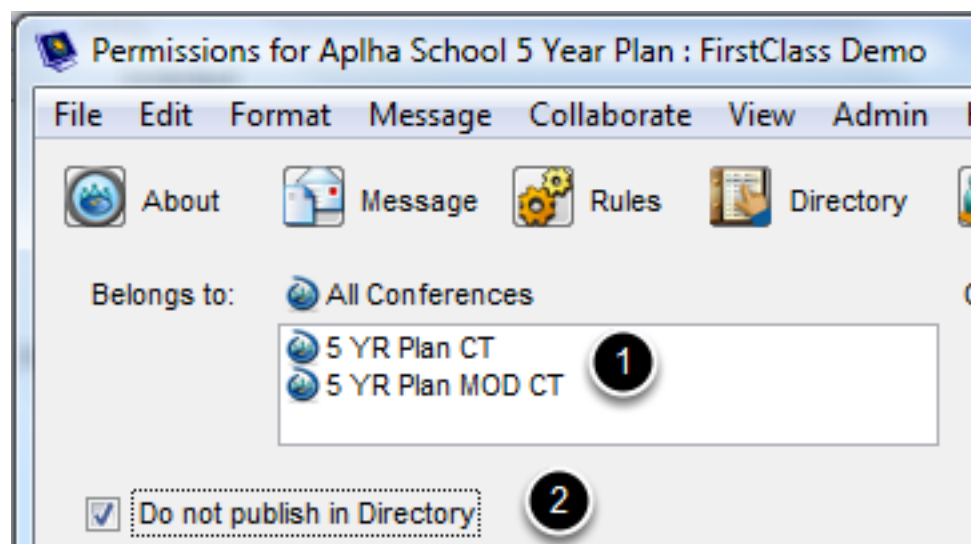


Alpha School 5 Year Plan

You can create any conference and give it your own name. Once created, this conference can be turned into a 5 Year Plan type conference.

- Create the conference
- Edit the properties to give it a name and icon of your choice

Apply the Container Template Types



- Select the conference then right-click and choose Permissions
- Add the conference to both the **5 YR Plan CT** and **5 YR Plan MOD CT** container template groups

- Check "Do not publish in Directory"

Modify Permissions

▼ View, Message options, Approval, Size limit, Expiry

View



Use view from server



Use template view only



Hide unapproved items

Drop down the triangle beside "View, Message options, Approval, Size limit, Expiry" and check:

- Use View from Server
- Use template view only

Modify Access Rights

Who:

Megan Hunter
All Users

Access:

Moderator
Reader

Permissions:



- Modify the access rights to allow only certain individuals to be **moderators** so that they can add new projects and complete the access rights by assigning **Reader** to the **All Users** group.

Creating a 12 Month Project Plan Conference

Now that the components are installed, you can create as many 12 Month Project Plan conferences as you like. Each site or department can have its own 12 Month project conference and each one can have its own set of moderators.

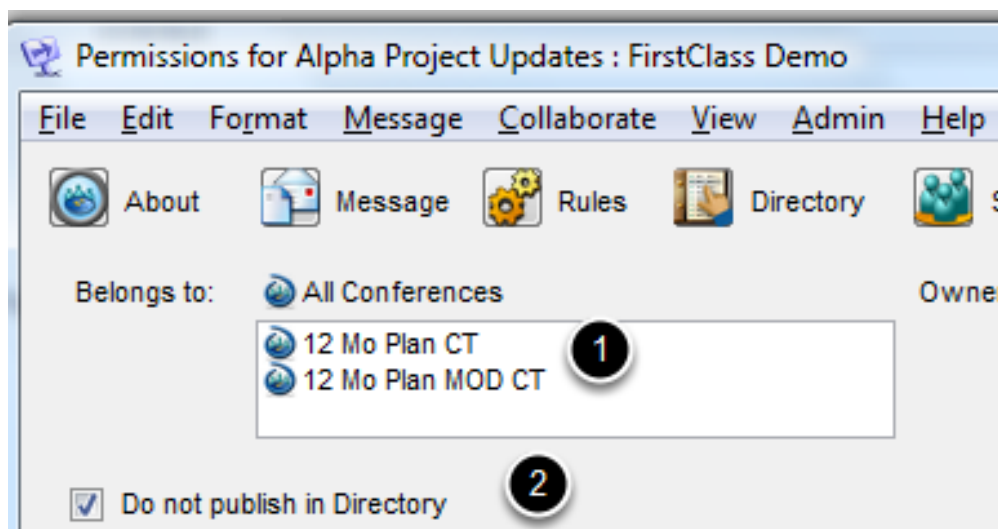
Create a New Conference



You can create any conference and give it your own name. Once created, this conference can be turned into a 12 Month Project Plan type conference.

- Create the conference
- Edit the properties to give it a name and icon of your choice

Apply the Container Template Types



- Select the conference and right-Click and Choose Permissions
- Add the conference to both the **12 Mo Plan CT** and **12 Mo Plan MOD CT** container template groups

- Check "Do not publish in Directory"

Modify Permissions

▼ View, Message options, Approval, Size limit, Expiry

View



Use view from server



Use template view only



Hide unapproved items

Drop down the triangle beside "View, Message options, Approval, Size limit, Expiry" and check:

- Use View from Server
- Use template view only

Modify Access Rights

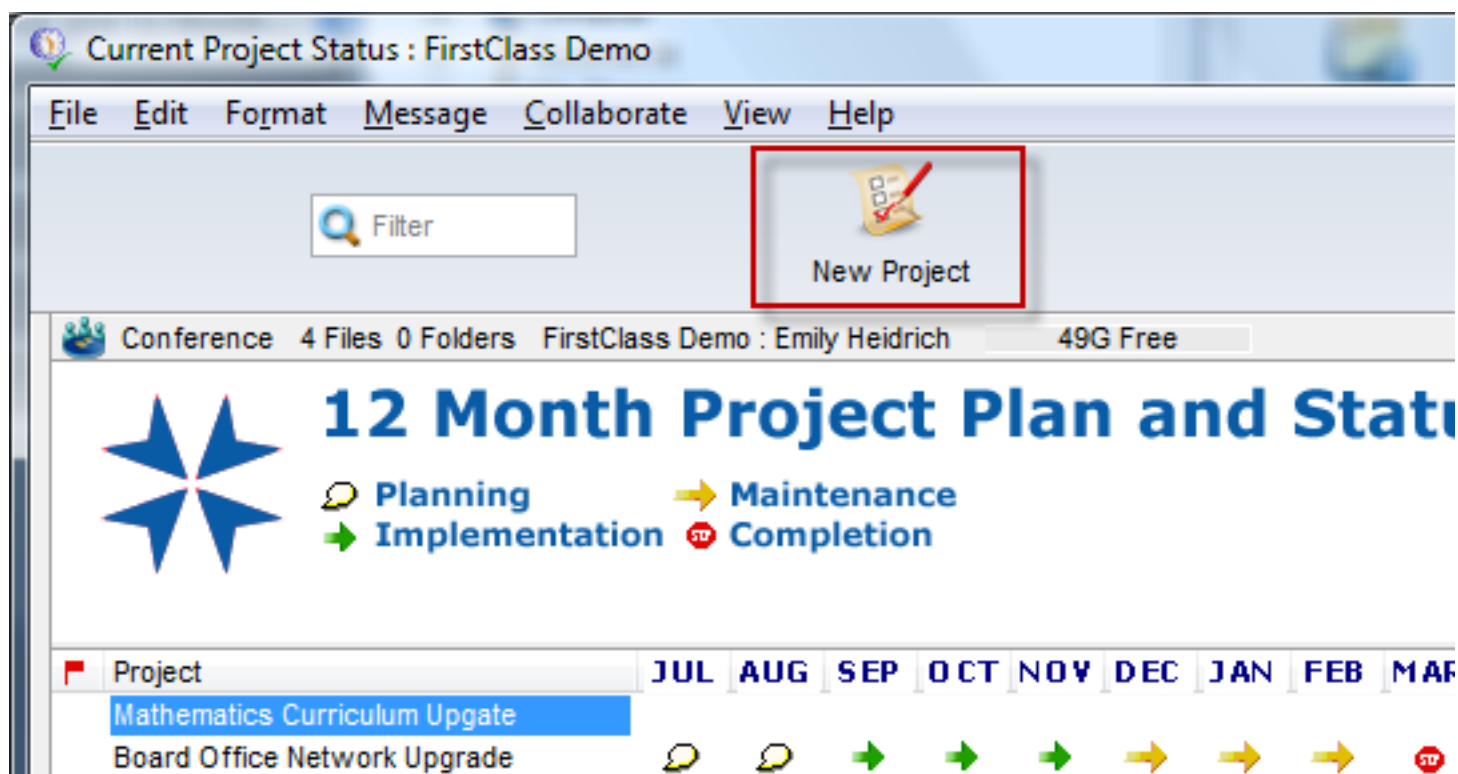
Who:	Access:	Permissions:
 Megan Hunter  All Users	Moderator Reader	

- Modify the access rights to allow only certain individuals to be **moderators** so that they can add new projects and complete the access rights by assigning **Reader** to the **All Users** group.

Adding Content

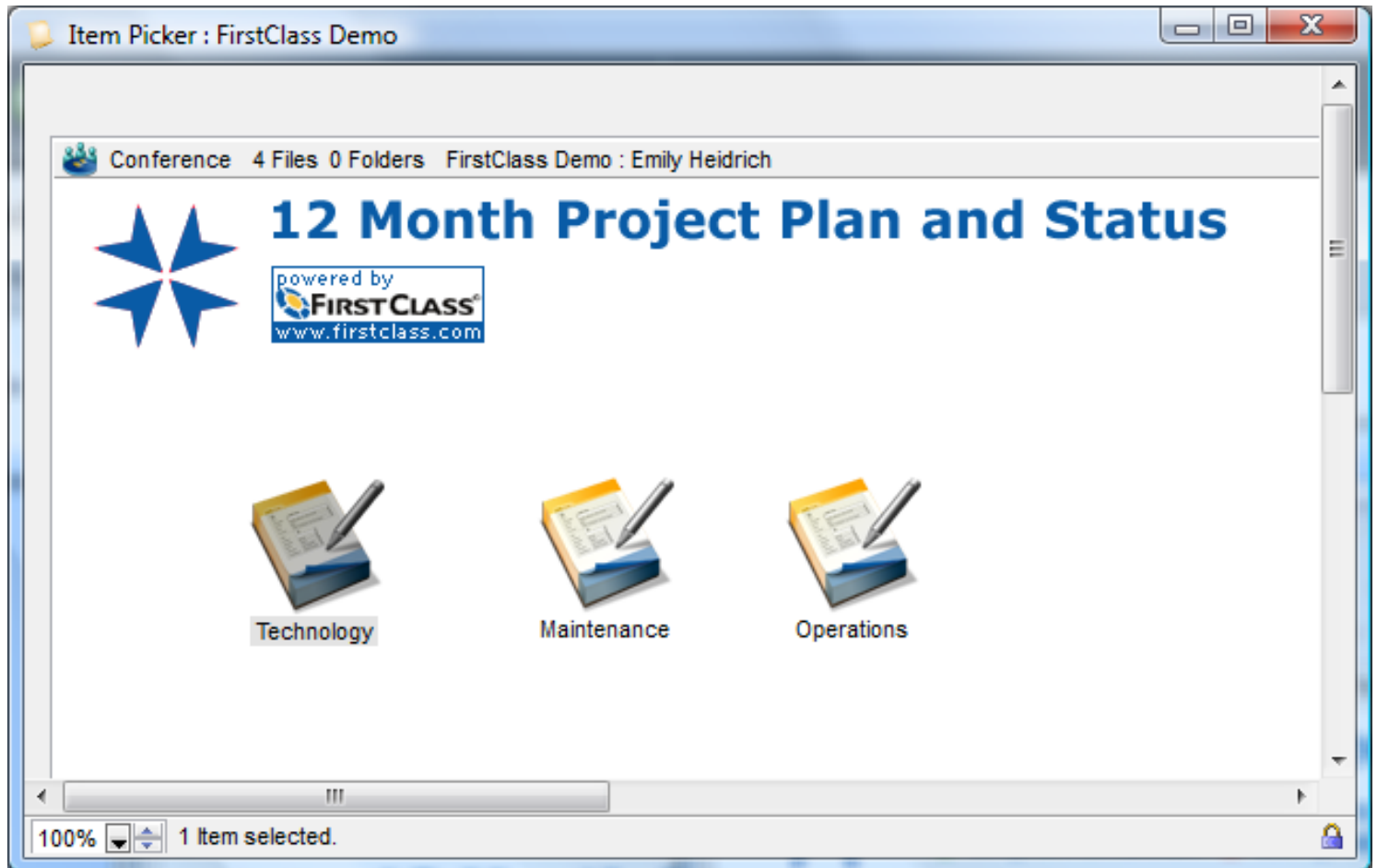
It is the responsibility of the conference moderator(s) to add project content. The selection of categories that are available when one clicks on the **New Project** Button can be modified by the FirstClass Administrator.

New Project Button



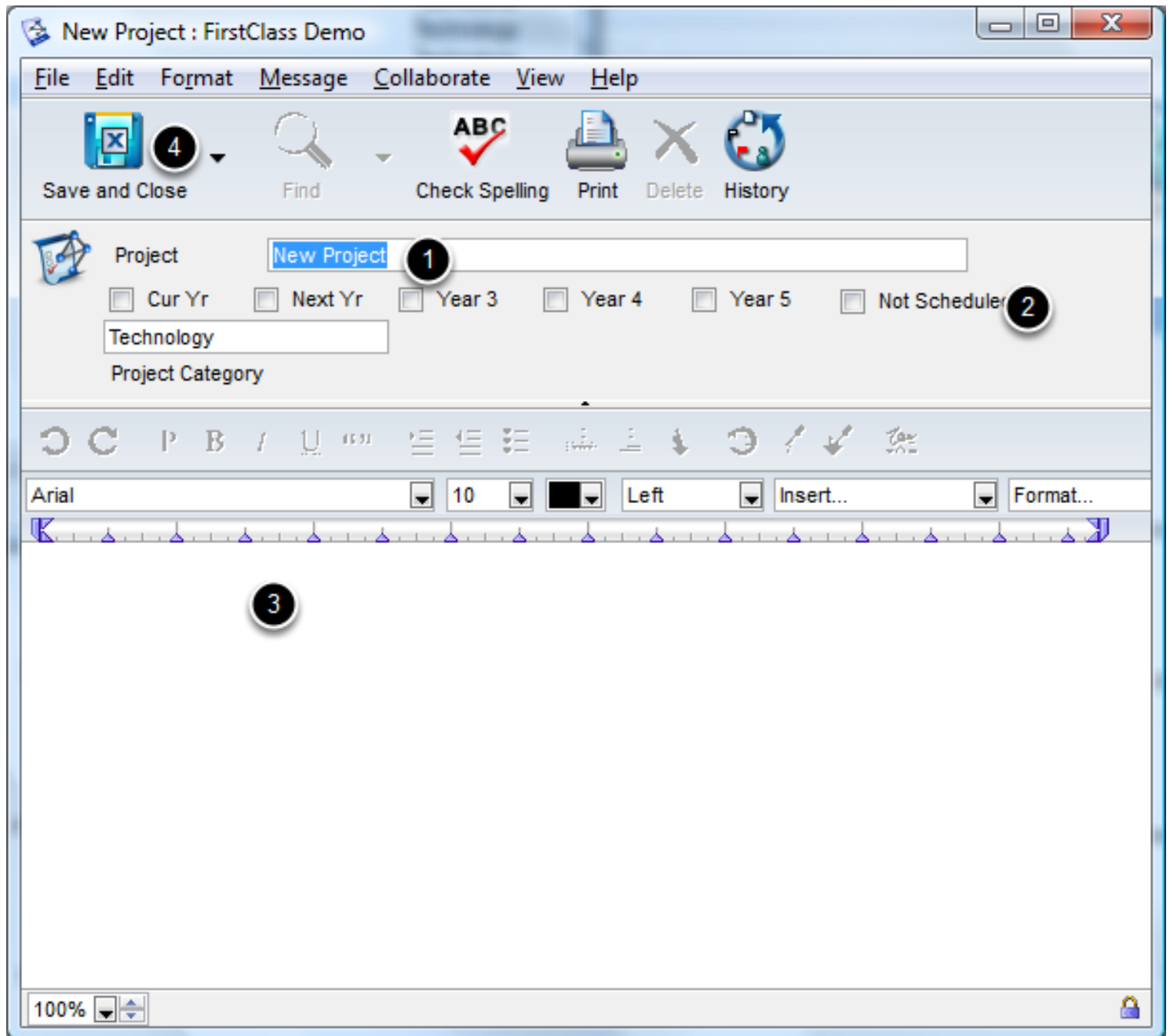
To add content to any one of the conferences, you have to be a Moderator. This will reveal the **New Project** button on the toolbar. Clicking on this button will reveal the documents that are available from the Picker conference.

Select a Category Type



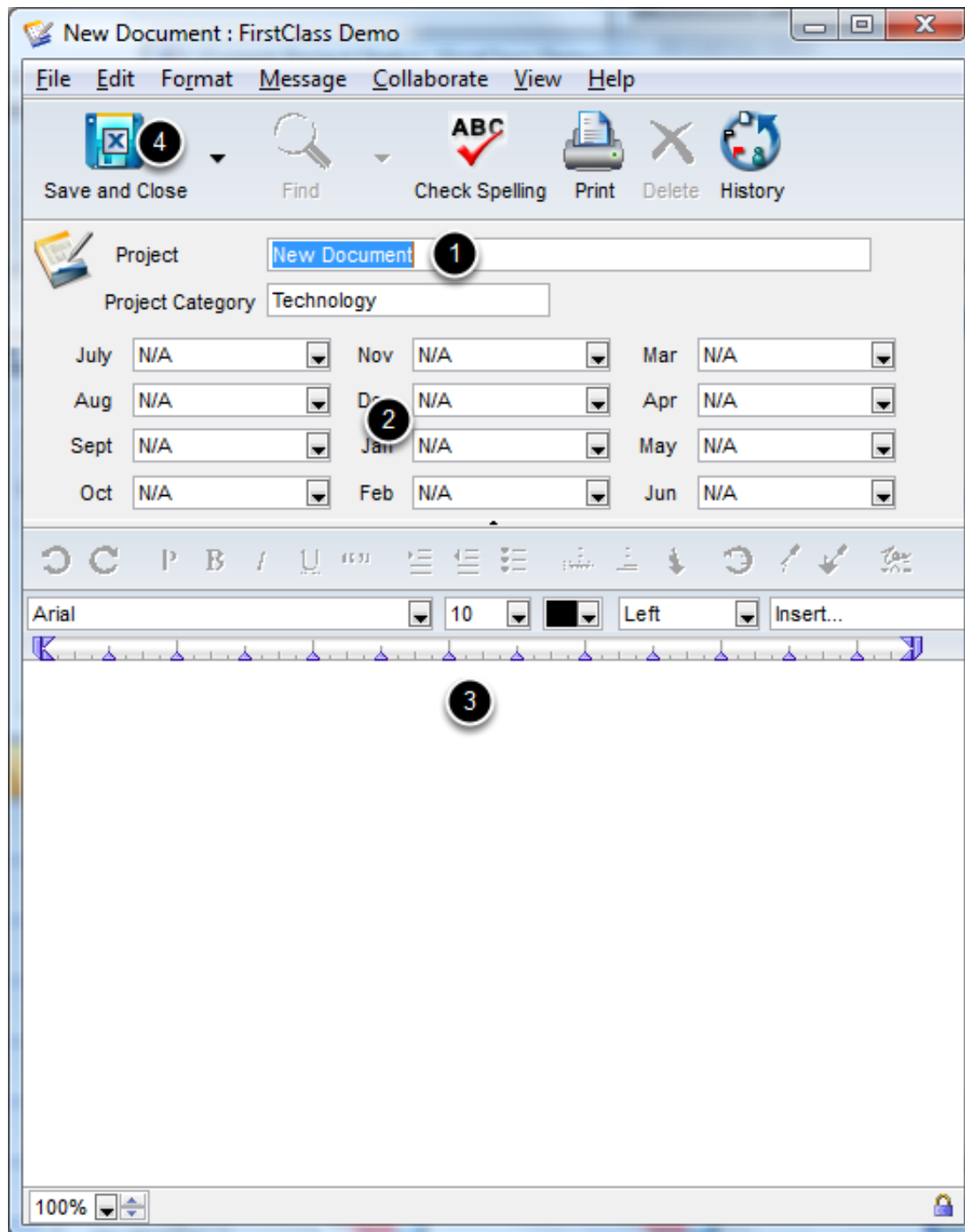
Double-Click on any one of these documents and it will copy it to the open conference.

Modifying a 5 Year Plan Document



1. Give the Project a Name
2. Determine the projected project status for of the 5 years
3. Add content in the body of the document (optional)
4. Click on Save and Close

Modifying a 12 Month Status Plan Document



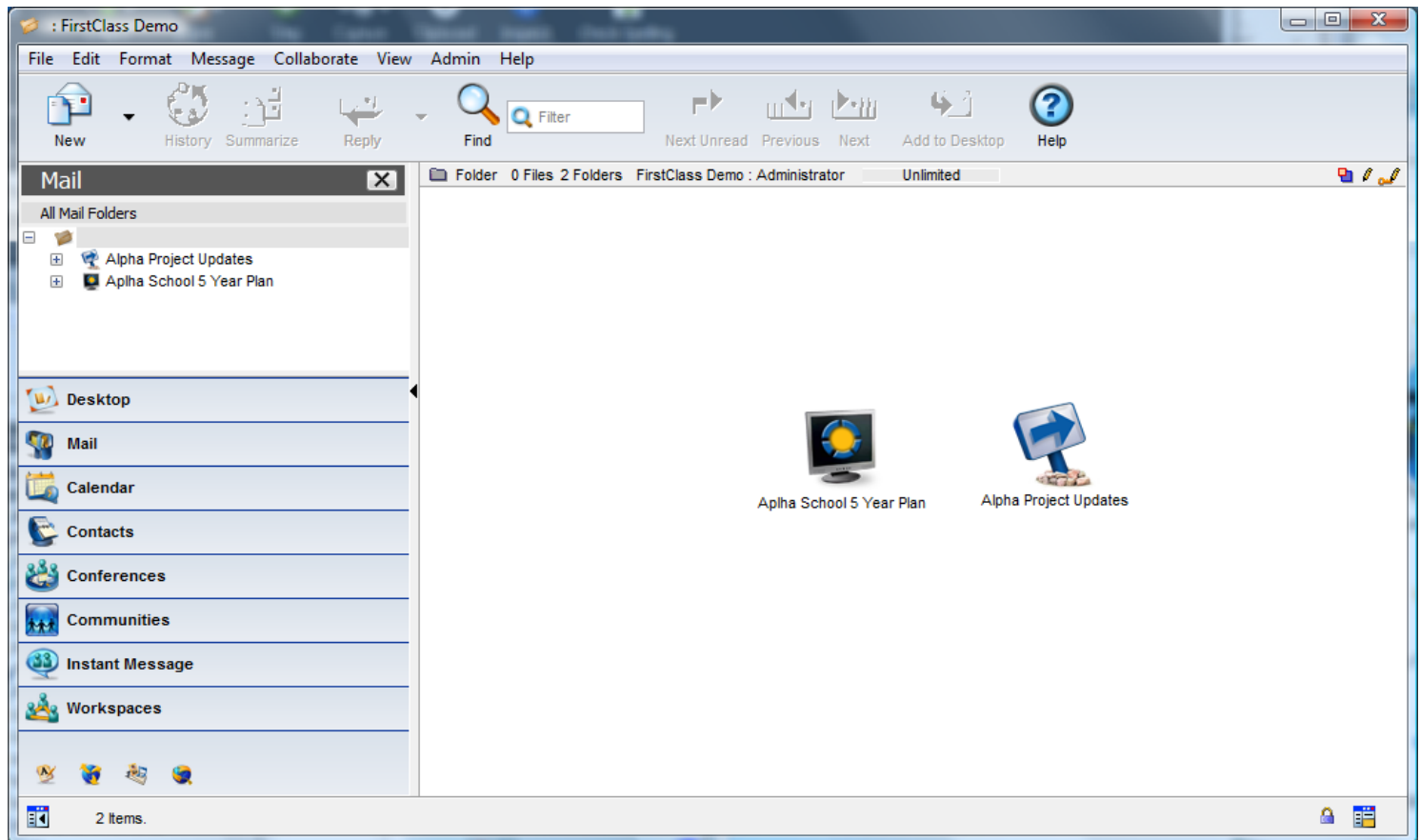
1. Give the Project a Name
2. Determine the projected project status for each month
3. Add content in the body of the document (optional)

4. Click on Save and Close

Deploy the Conferences

The conferences are now ready to be deployed.

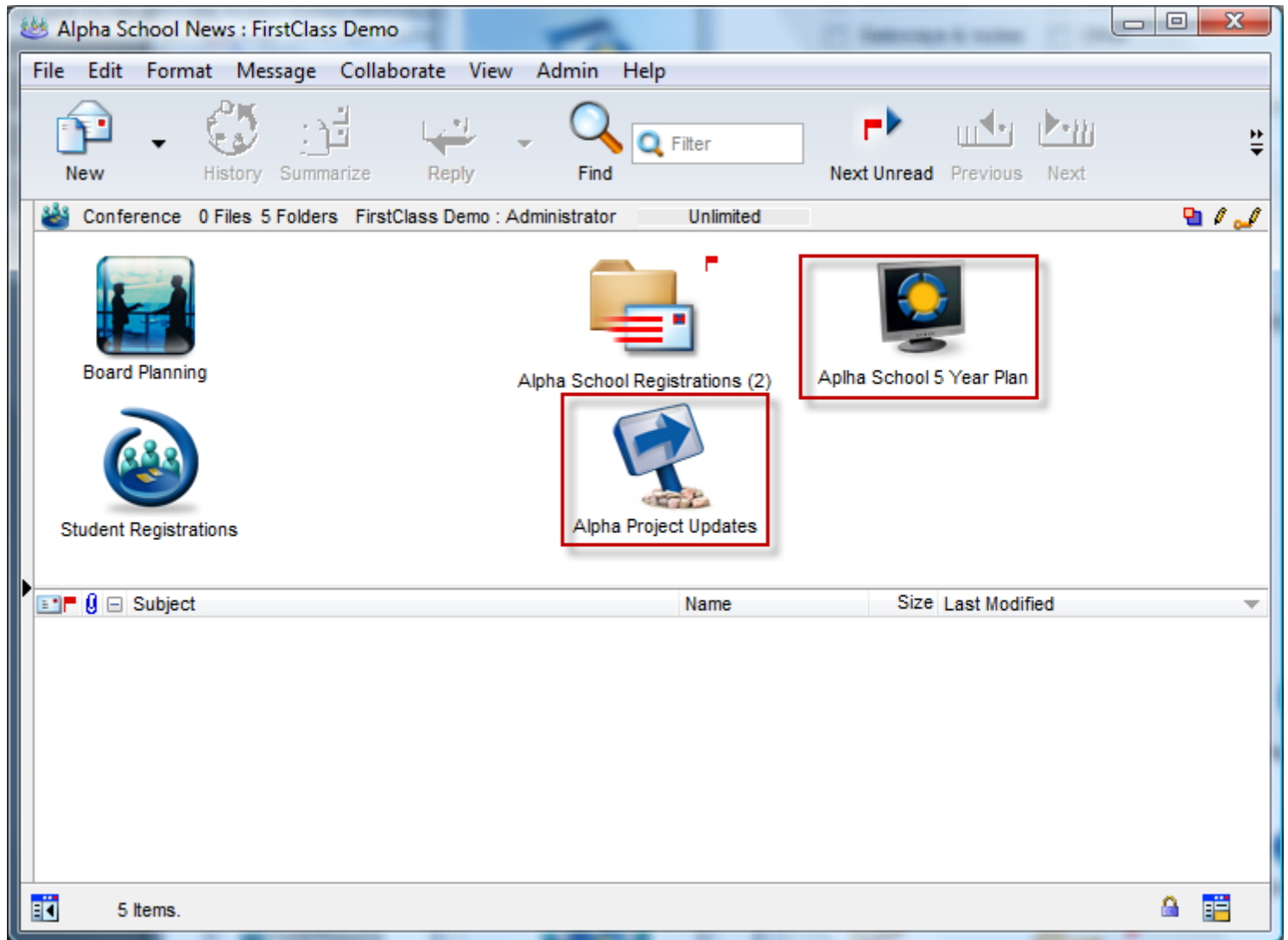
Deploy through Model Desktop



One way to deploy the conferences are to place and alias on the model desktops of an associated group. This will ensure that all members of the group will have access to the conference directory on their desktop.

If your moderators are not members of the group, you can subscribe them individually.

Place an alias in a conference



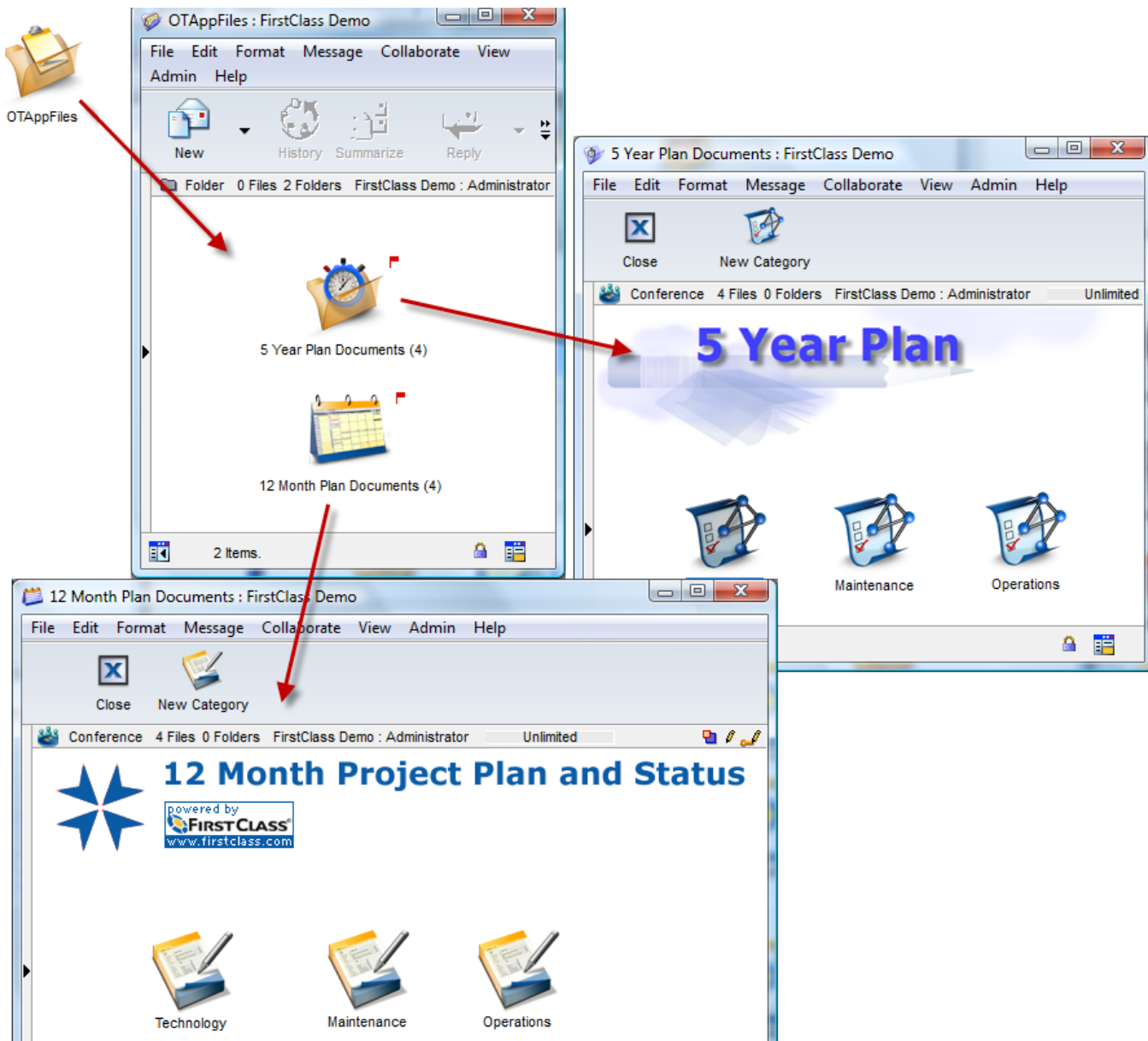
Alternatively, if the group that you want to have access to your conference already has a group related conference, you can place an alias of your conferences within that conference.

Customizations

Modifying Category Document Picker Selections

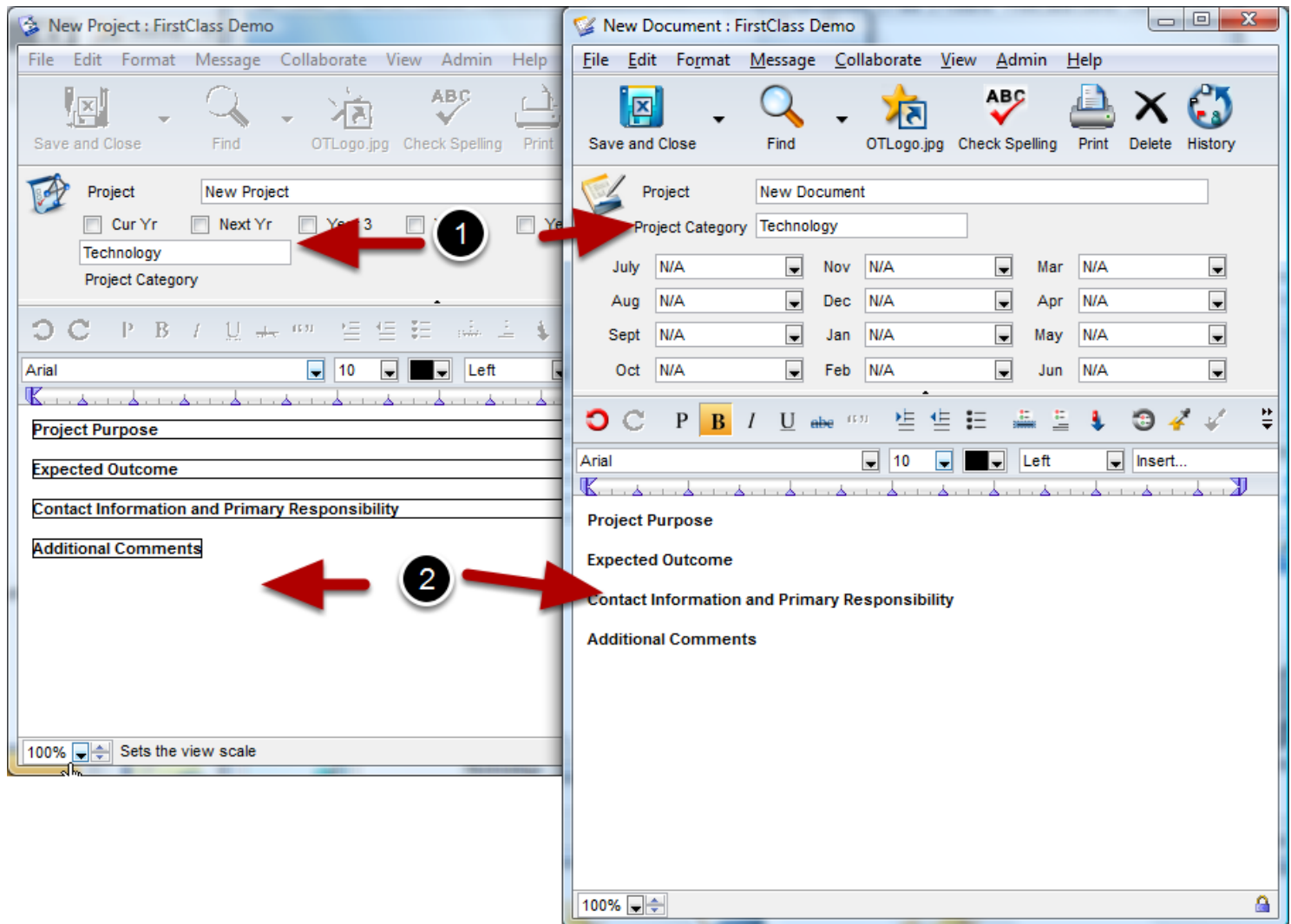
When a moderator clicks on the New Project button, the moderator is presented with a number of category choices. The FirstClass Administrator can add/remove and modify these choices.

Open the Picker Folder



The two Picker folders are located in the **FirstClass Applications/OTAppFiles** folder on the Admin desktop.

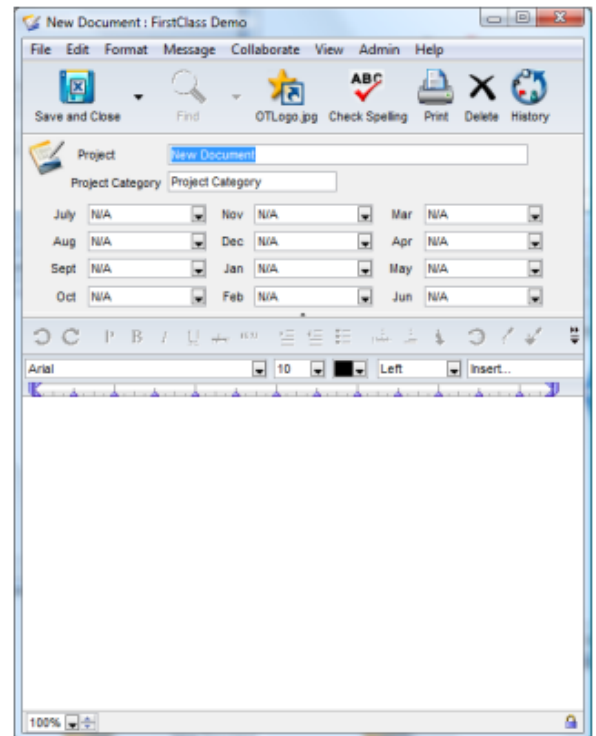
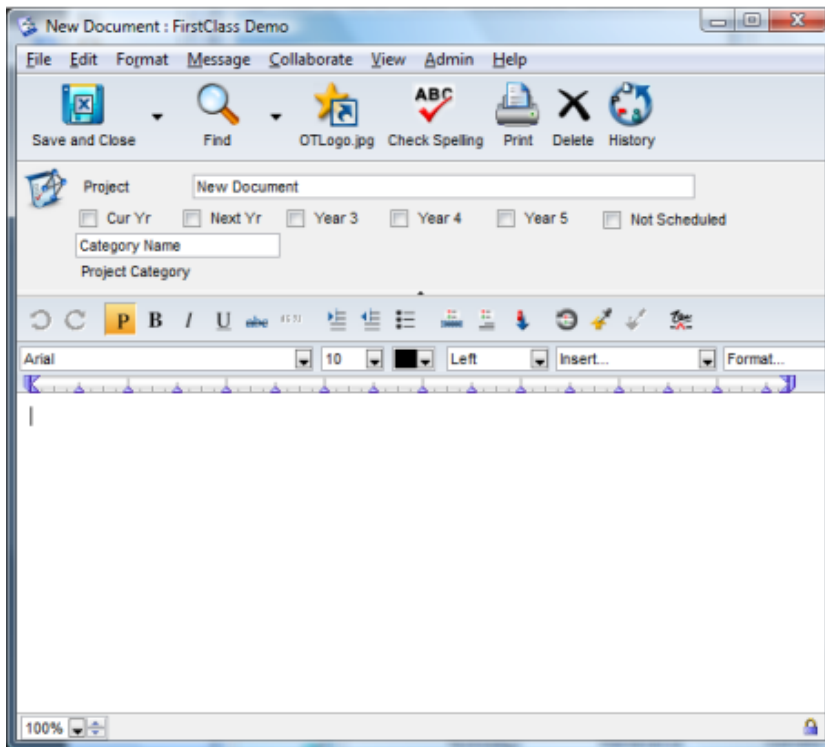
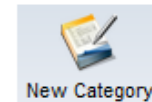
Modify Existing Documents



You can modify any of the existing documents by opening them and:

1. Change the category title
2. Add some sample text in the body that you wish the moderator to follow for each new project

Add/Remove Categories



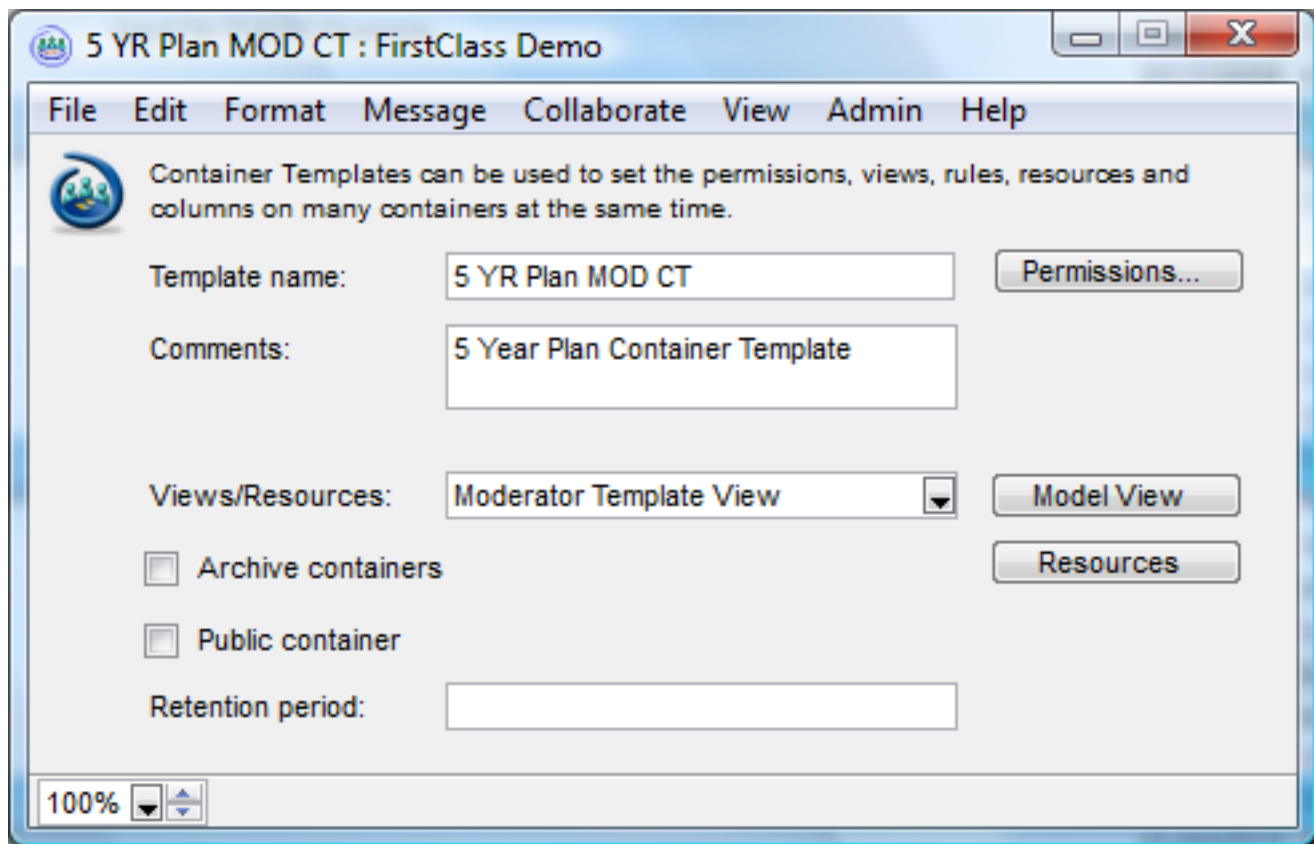
You can remove categories by simply deleting the document from the picker folder. To add a new category:

- Click on the **New Category** button
- Change the Category name and optionally add content to the body of the document
- Save and Close
- Arrange the new category in the picker window

Modifying Background Images in Conferences

The background images used in the conferences are stored in the rules and resources folders of the corresponding Container Templates.

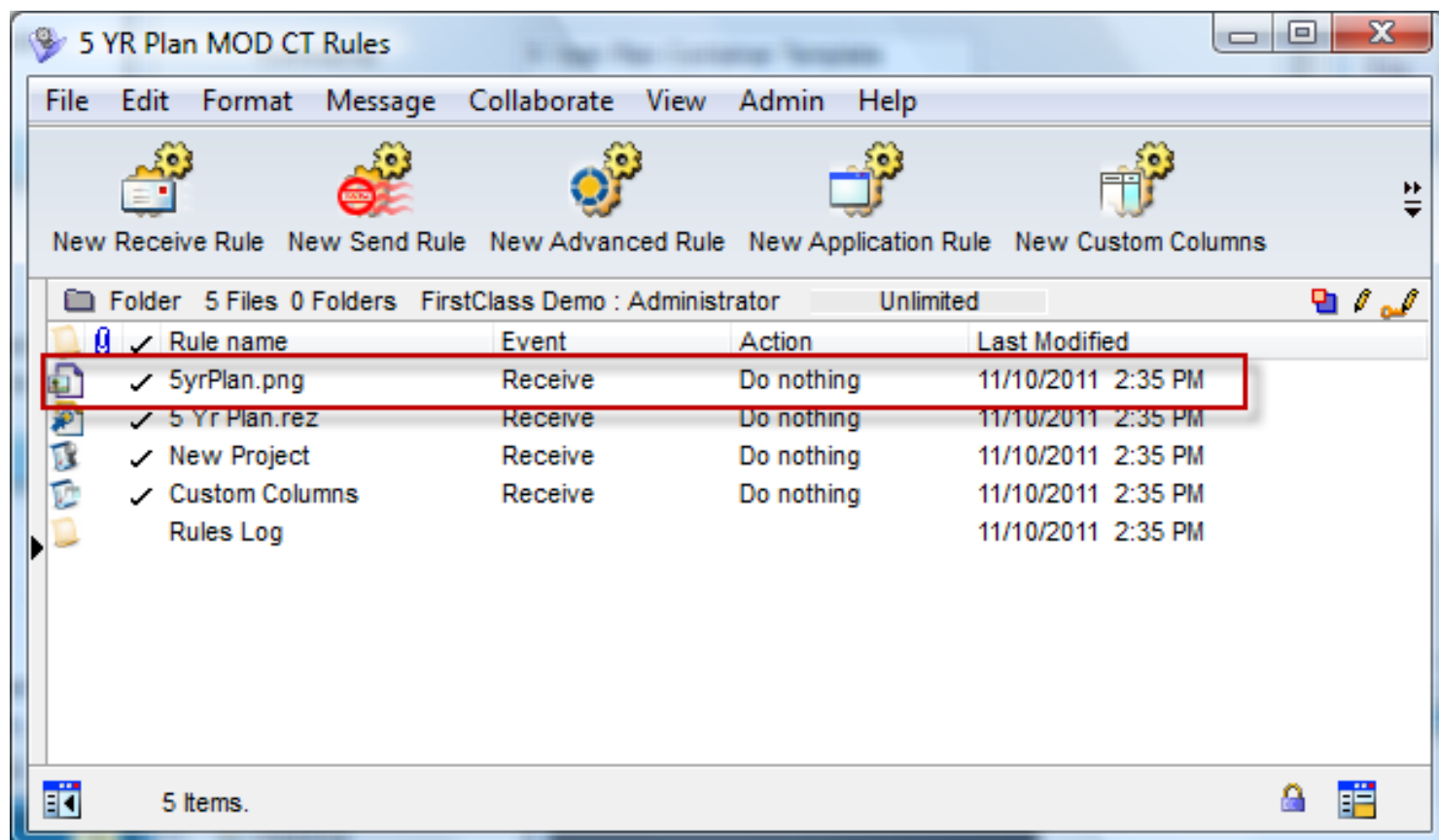
Open the Container Template



Each conference type has two corresponding Container templates. For the **5 Year Plan** there are **5 YR Plan CT** and **5 YR Plan MOD CT** container templates. For the **12 Month Plan**, there are **12 Mo Plan CT** and **12 Mo Plan MOD CT**. You will need to change the image in both corresponding container templates.

- Open the container template

Click on Resources and replace the background image



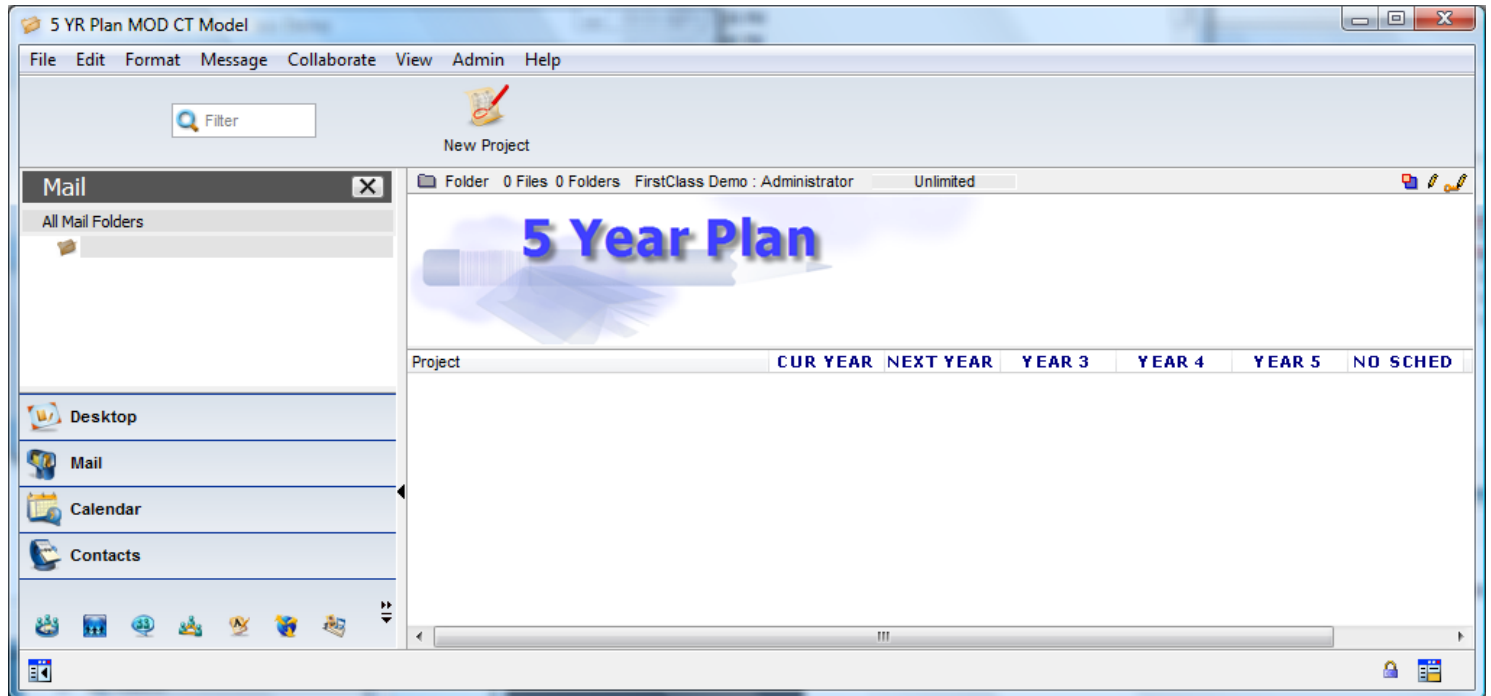
The default background image for the 5 Yr Plan is **5yrPlan.png**. For the 12 Month Plan, the image is **12 Mo Project.png**.

You can replace these images with one of your own.

- Upload your image to this folder and close the resources folder

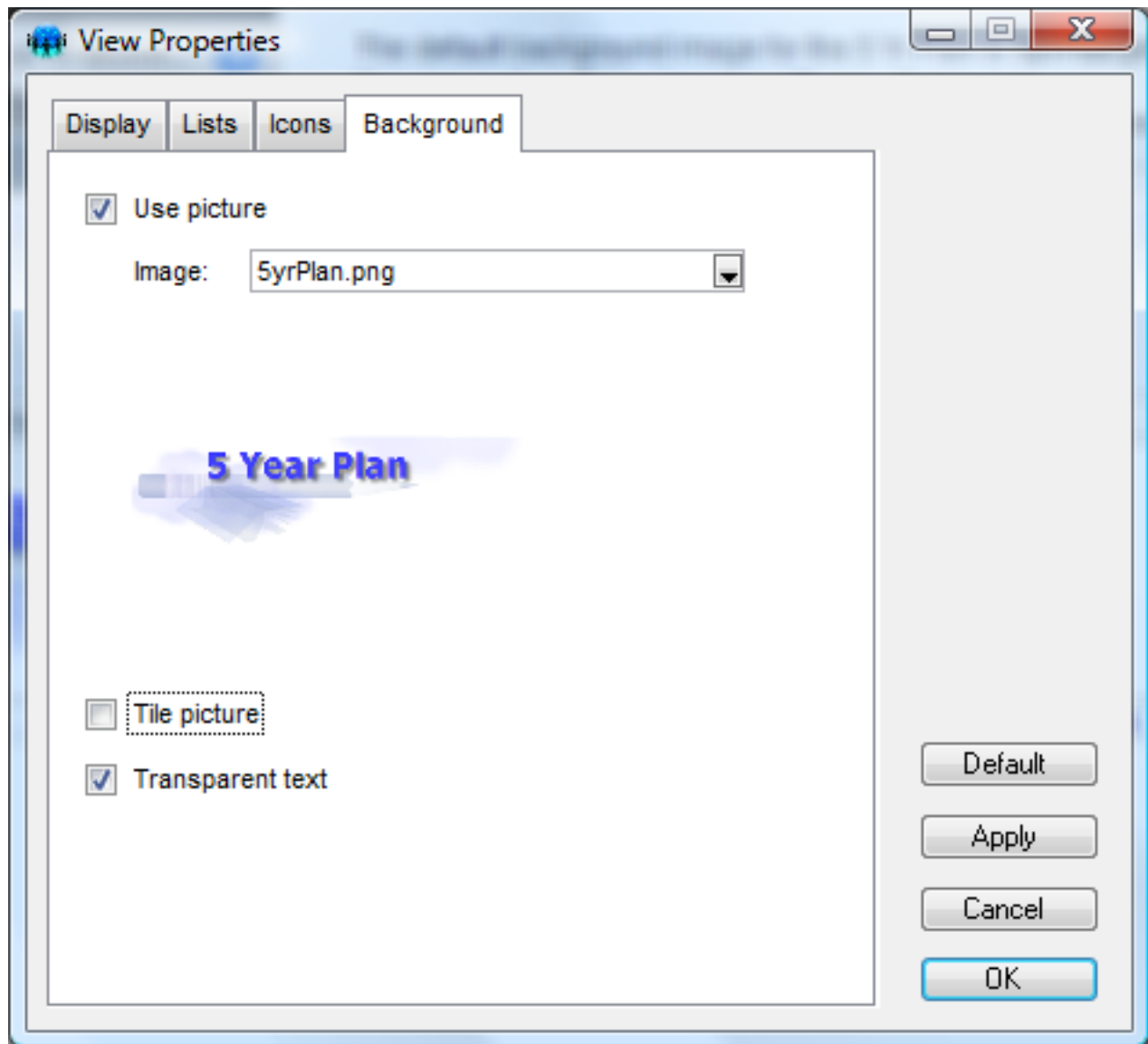
Note: Do not use the same name for your image. Choose something different.

Open the Model View



- Click on the Model View button on the container template form to view the current view for the conference. The image is used in the top pane of all conferences belonging to this group.

Modify the top Pane View Properties



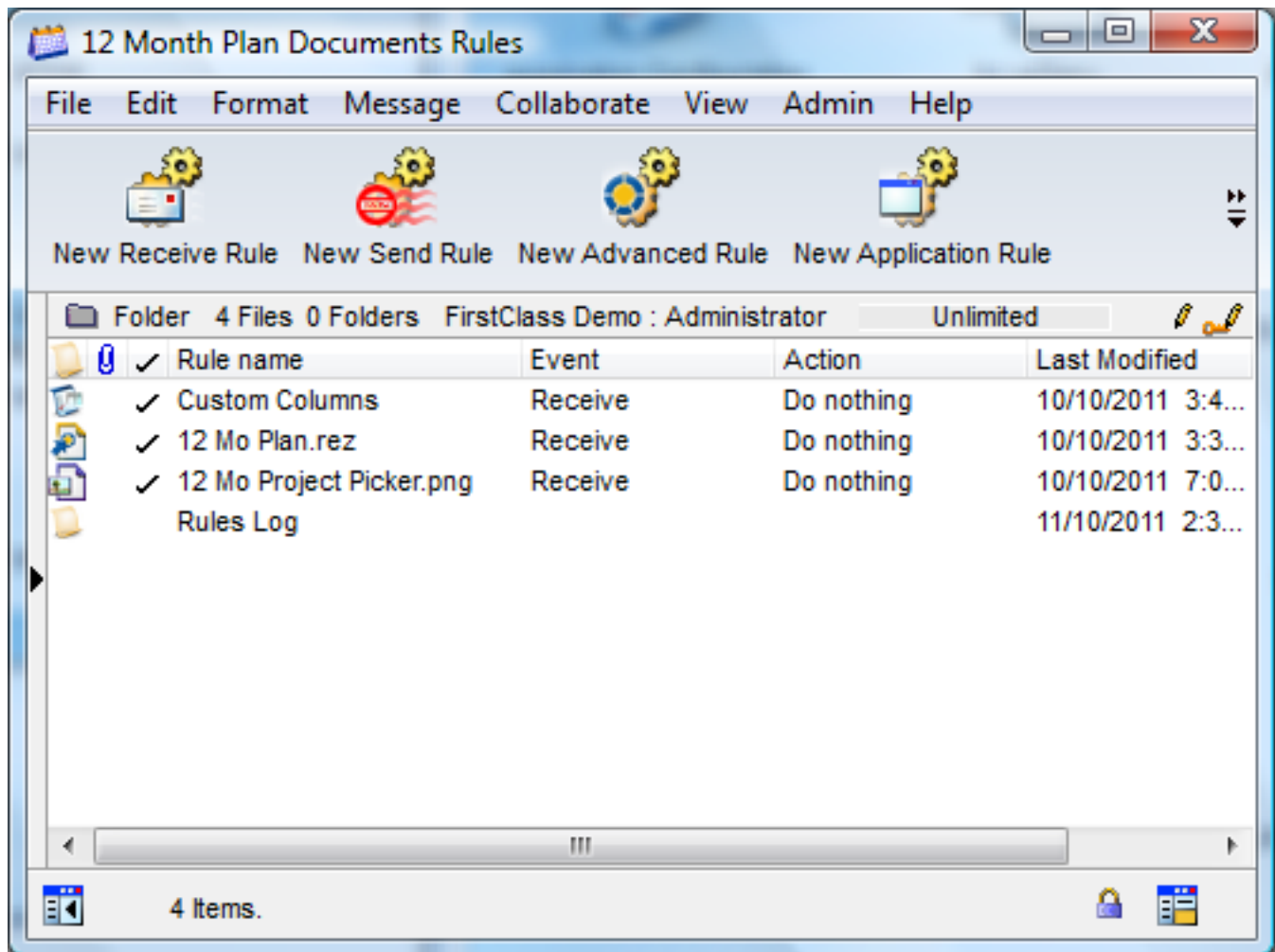
- Right-click on the top pane and choose **Change View Properties...** and click on the Background Tab.
- Change the image name to reflect your new image and click on OK

Modifying Background Image in Picker

Just as you can modify the background for the conferences, you can modify the background image in the picker folders.

The images for the picker folders are stored within the Rules folder for each of those conferences.

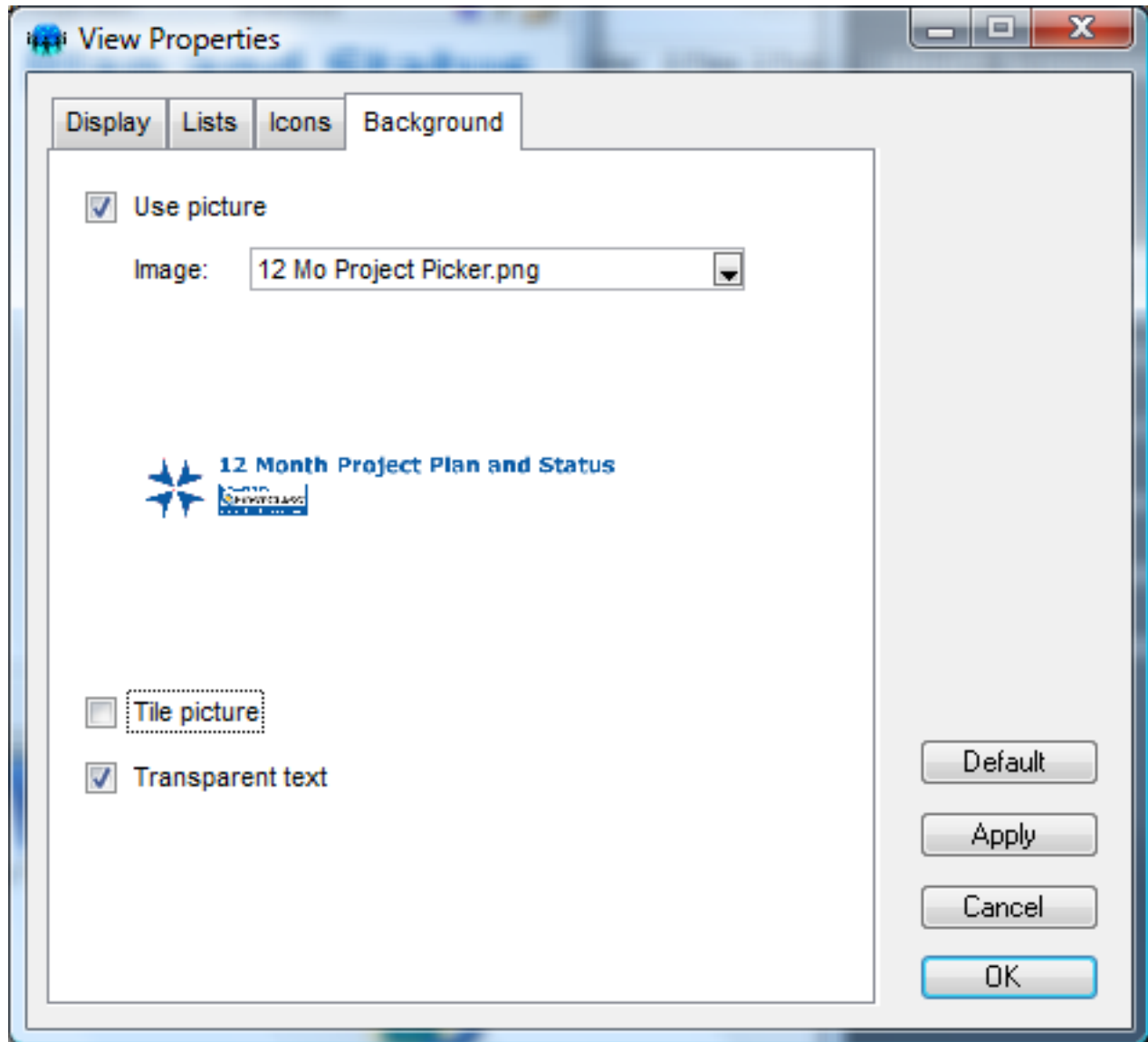
Replace the image in the Rules folder for the picker conference you wish to change



You will need to replace the image stored in the rules folder. or the 12 Month Plan Documents, the image is **12 Mo Project Picker.png** and for the 5 Year Plan Documents, the image is **5yrPlan.png**.

- Open the Rules Folder
- Replace the image

Change Background Image on Picker Conference

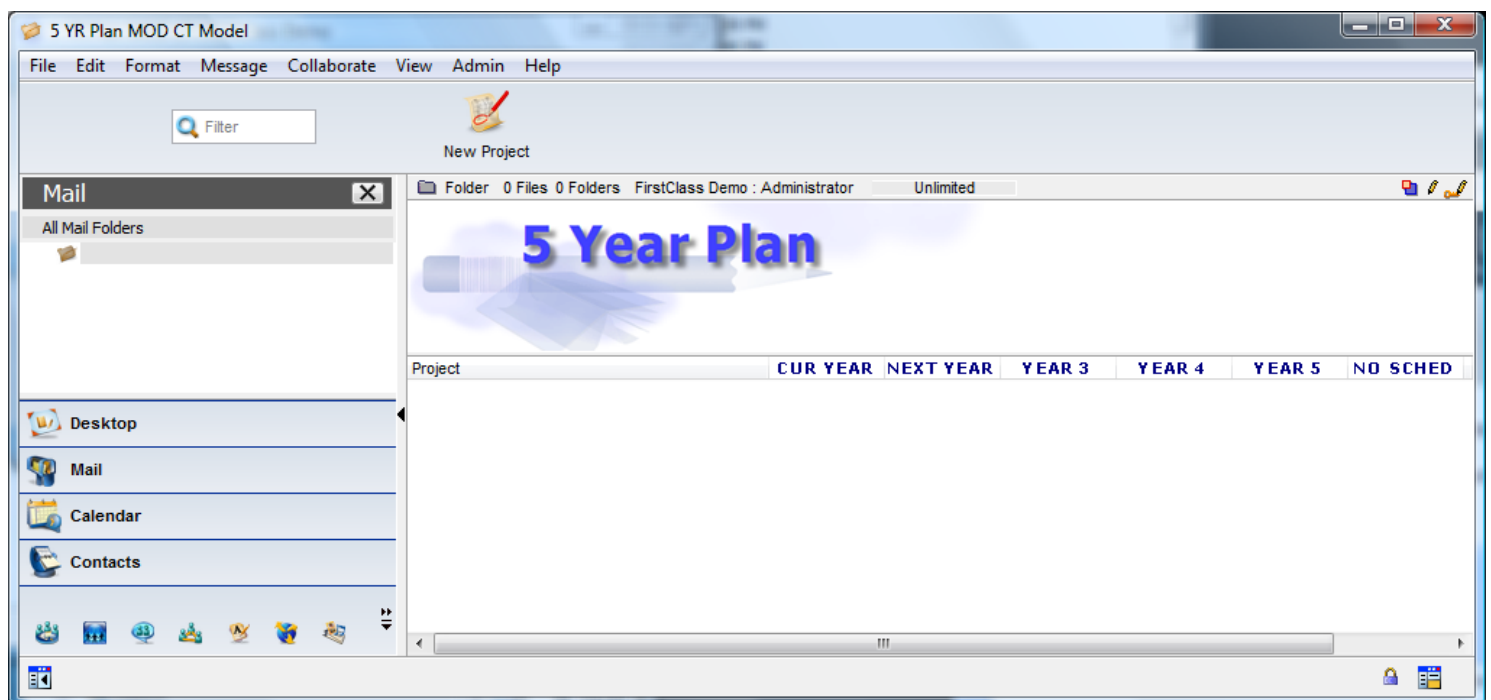


- Open the picker conference
- Right-click on the conference window and select **Change View Properties...**
- Click on the **Background** tab and enter the name of the image that you uploaded
- Click on OK

Modifying the Container Toolbars

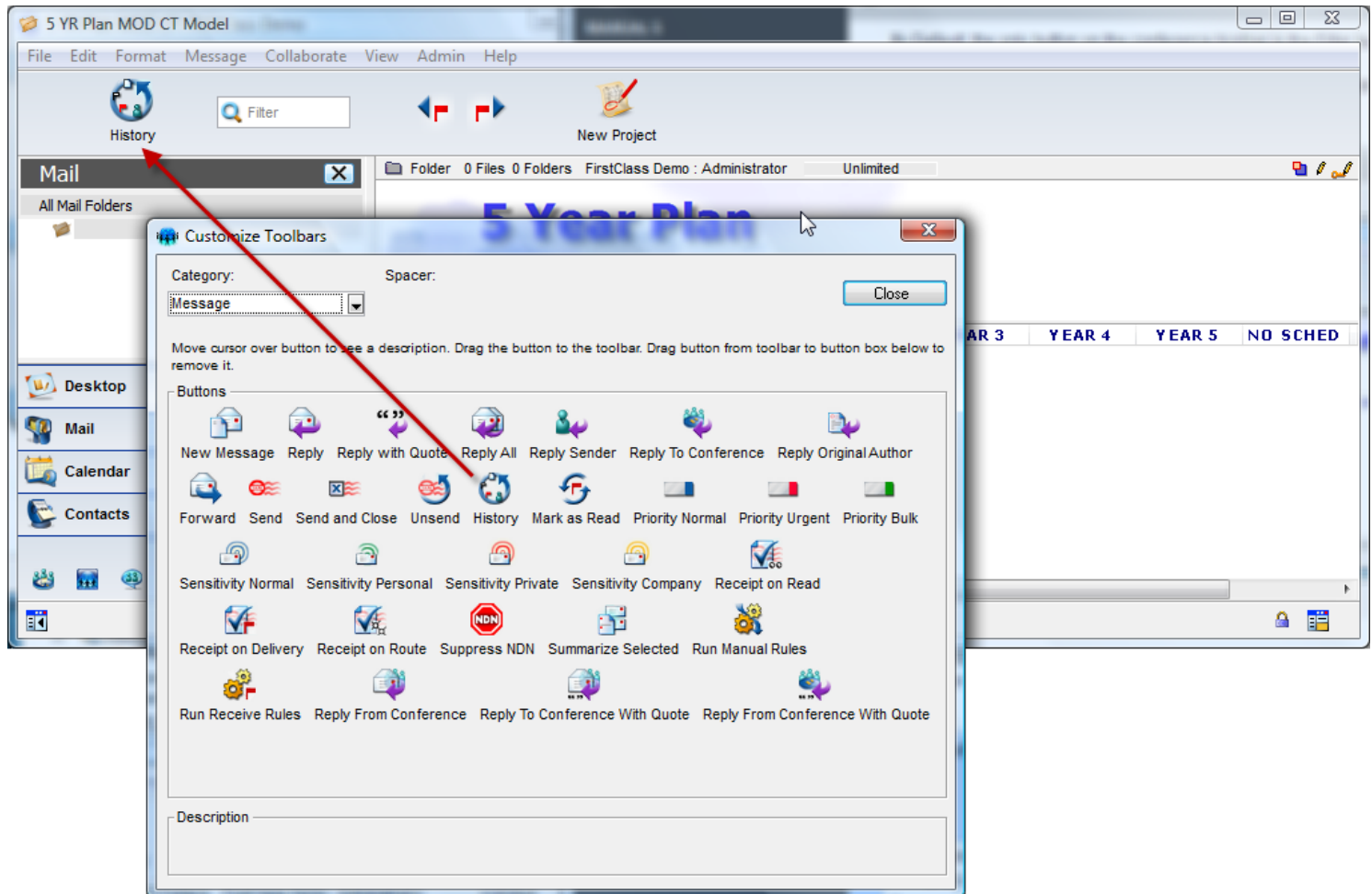
By Default, the only button on the conference toolbar is the Filter button (plus the New Project button for moderators). You may wish to add additional buttons for your users. By adding buttons to the container template, these buttons will appear on all conferences associated with the container template group.

Open the Model View of the Container Template



Follow the instructions in the [Modifying Background Images in Conferences](#) section to open the model view for your Container Template

Add Toolbar buttons



- Right-Click on the Toolbar and choose **Customize Toolbars** to display the Customize Toolbar selection dialog.
- Drag additional buttons to the toolbar
- Close the Model View and Container Template
- Repeat for each container template.