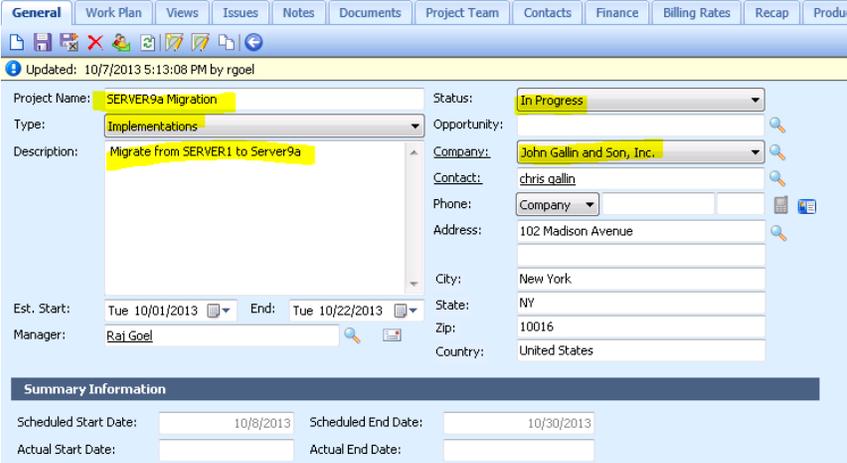
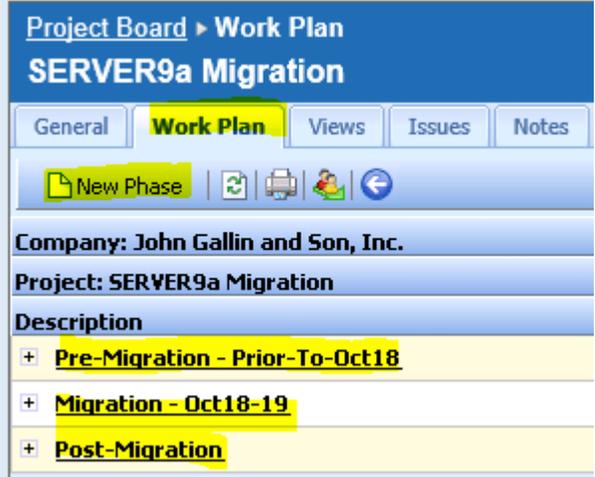


Last Updated at 2/16/2014 11:23 PM by Joseph Mulry

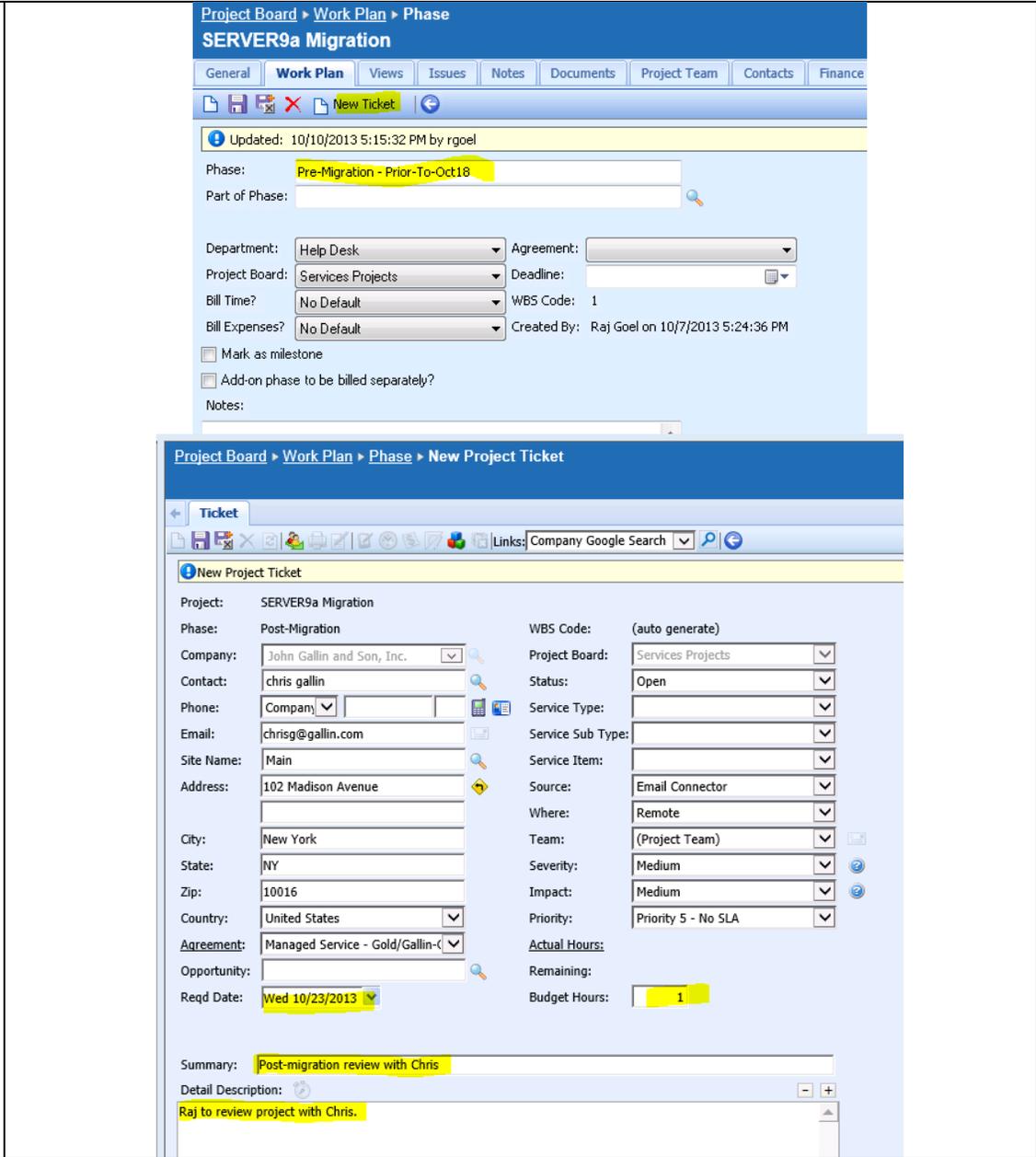
Step	Description	Screenshot
1.	Log on to ConnectWise either through the Desktop App or at https://brainlink.myconnectwise.net	
2.	Navigate to PROJECT -> PROJECT BOARD	
3.	Select NEW Project	
4.	Name the project, assign it to client	 <p>The screenshot shows the 'General' tab of a project creation form in ConnectWise. The form includes the following fields:</p> <ul style="list-style-type: none"> Project Name: SERVER9a Migration Type: Implementations Description: Migrate from SERVER1 to Server9a Status: In Progress Opportunity: (empty) Company: John Gallin and Son, Inc. Contact: chris gallin Phone: (empty) Address: 102 Madison Avenue City: New York State: NY Zip: 10016 Country: United States Est. Start: Tue 10/01/2013 End: Tue 10/22/2013 Manager: Raj Goel <p>Below the main form is a 'Summary Information' section with the following fields:</p> <ul style="list-style-type: none"> Scheduled Start Date: 10/8/2013 Scheduled End Date: 10/30/2013 Actual Start Date: (empty) Actual End Date: (empty)
5.	Save the project	
6.	Click on WORKPLAN	

Creating Project Plans in ConnectWise

7.	ADD at least 3 phases – PRE-...; DURING...; POST-...	 <p>The screenshot shows the 'Project Board > Work Plan' interface for 'SERVER9a Migration'. It features a navigation bar with 'General', 'Work Plan', 'Views', 'Issues', and 'Notes'. Below this is a toolbar with a 'New Phase' button and icons for refresh, print, add user, and back. The main content area displays the project details: 'Company: John Gallin and Son, Inc.', 'Project: SERVER9a Migration', and a 'Description' section with three expandable phases: '+ Pre-Migration - Prior-To-Oct18', '+ Migration - Oct18-19', and '+ Post-Migration'.</p>
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Creating Project Plans in ConnectWise

8. Click on EACH PHASE, and ADD Tickets



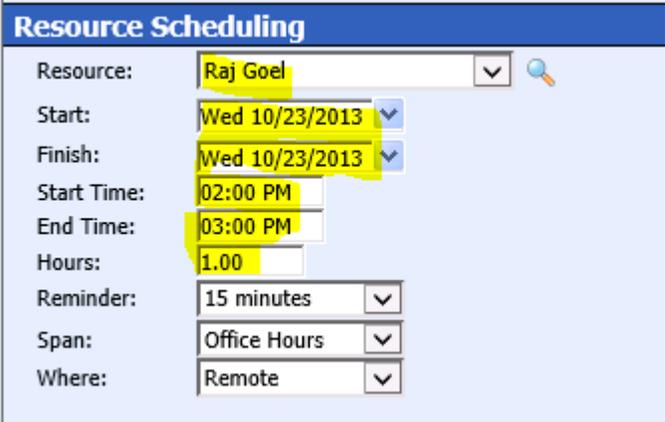
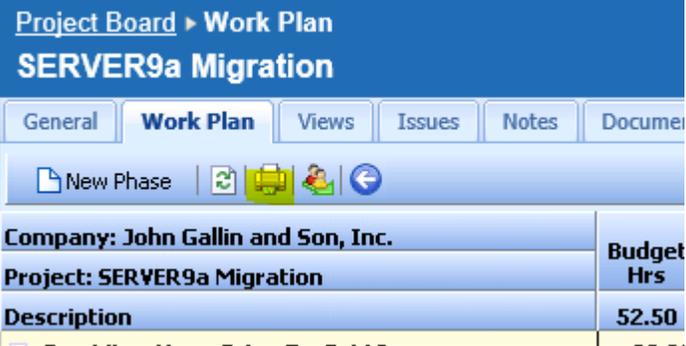
The screenshot displays two overlapping windows from the ConnectWise software. The top window is titled 'Project Board > Work Plan > Phase' and shows the 'SERVER9a Migration' phase. It includes a 'New Ticket' button and a form with the following fields:

- Updated: 10/10/2013 5:15:32 PM by rgoel
- Phase: Pre-Migration - Prior-To-Oct18
- Part of Phase: (empty)
- Department: Help Desk
- Project Board: Services Projects
- Bill Time?: No Default
- Bill Expenses?: No Default
- Agreement: (empty)
- Deadline: (empty)
- WBS Code: 1
- Created By: Raj Goel on 10/7/2013 5:24:36 PM
- Options: Mark as milestone, Add-on phase to be billed separately?
- Notes: (empty)

The bottom window is titled 'Project Board > Work Plan > Phase > New Project Ticket' and shows the 'New Project Ticket' form with the following details:

- Project: SERVER9a Migration
- Phase: Post-Migration
- Company: John Gallin and Son, Inc.
- Contact: chris gallin
- Phone: Company
- Email: chrisg@gallin.com
- Site Name: Main
- Address: 102 Madison Avenue
- City: New York
- State: NY
- Zip: 10016
- Country: United States
- Agreement: Managed Service - Gold/Gallin-C
- Opportunity: (empty)
- Reqd Date: Wed 10/23/2013
- WBS Code: (auto generate)
- Project Board: Services Projects
- Status: Open
- Service Type: (empty)
- Service Sub Type: (empty)
- Service Item: (empty)
- Source: Email Connector
- Where: Remote
- Team: (Project Team)
- Severity: Medium
- Impact: Medium
- Priority: Priority 5 - No SLA
- Actual Hours: (empty)
- Remaining: (empty)
- Budget Hours: 1
- Summary: Post-migration review with Chris
- Detail Description: Raj to review project with Chris.

Creating Project Plans in ConnectWise

9.	Assign TECH, start date, time. Assign AUTOMATED & NOC tasks to SERVICE DESK user	 <p>Resource Scheduling</p> <p>Resource: <input type="text" value="Raj Goel"/> <input type="button" value="v"/> <input type="button" value="🔍"/></p> <p>Start: <input type="text" value="Wed 10/23/2013"/> <input type="button" value="v"/></p> <p>Finish: <input type="text" value="Wed 10/23/2013"/> <input type="button" value="v"/></p> <p>Start Time: <input type="text" value="02:00 PM"/></p> <p>End Time: <input type="text" value="03:00 PM"/></p> <p>Hours: <input type="text" value="1.00"/></p> <p>Reminder: <input type="text" value="15 minutes"/> <input type="button" value="v"/></p> <p>Span: <input type="text" value="Office Hours"/> <input type="button" value="v"/></p> <p>Where: <input type="text" value="Remote"/> <input type="button" value="v"/></p>						
10.	Once ALL tasks have been added, time budgets added, etc, go to the WORK PLAN and SAVE AS PDF	 <p>Project Board ▶ Work Plan</p> <p>SERVER9a Migration</p> <p>General Work Plan Views Issues Notes Document</p> <p><input type="button" value="New Phase"/> <input type="button" value="🔄"/> <input type="button" value="🚚"/> <input type="button" value="👤"/> <input type="button" value="⬅️"/></p> <table border="1"> <tr> <td>Company: John Gallin and Son, Inc.</td> <td>Budget Hrs</td> </tr> <tr> <td>Project: SERVER9a Migration</td> <td></td> </tr> <tr> <td>Description</td> <td>52.50</td> </tr> </table>	Company: John Gallin and Son, Inc.	Budget Hrs	Project: SERVER9a Migration		Description	52.50
Company: John Gallin and Son, Inc.	Budget Hrs							
Project: SERVER9a Migration								
Description	52.50							
11.								