

Owner's manual

Version 1.3



The screenshot displays the Easy Project software interface. At the top, there is a navigation bar with a search function. Below it, a sidebar shows a status filter and a list of project items. The main area features a Gantt chart with various task blocks, a team list on the right, and a workflow diagram. A callout box for 'John S.' is positioned over the Gantt chart, and another for 'Callie H.' is over the team list. A detailed view of 'PHASE I - Client Zone Development' is shown in a separate window, listing team members like 'Red developers' and 'Blue consultants'.

Guidelines for the installation and smooth use of Easy Project

Welcome to Easy Project

Easy Project has grown from the Redmine community and has been developed to perfection over the course of 13 years, by a dedicated team of Easy Software engineers. Our goal is to make Easy Project the best Open Source solution for a complete management system.



Upgradable

Upgradable from all Redmine versions (including Redmine 5).



100% Open source

The best Open source solution for project management.



Easy to set up

Set-up is easy thanks to predefined roles and dashboards.



Customizable

Dashboards, advanced settings, and templates make customizations easy.



Quick & secure

Global cloud and server solutions ensure the best performance.



Integrated

API, XML, Json, Webhooks, XLSX/CSV imports available for integrations.

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1

Introduction

You have made the right decision to obtain Easy Project. It will help your company run smoother. But, as with all complex systems, there are some initial admin settings to be thought out and configured. Also, regular users may need to learn a thing or two about the application's behavior and logic.

This guide will walk you through everything you need to know to adapt Easy Project quickly and painlessly. The goal of this manual is to get your application into a state where you can start managing real projects with real people in a short amount of time.

You will not find the exact description of every button and setting in the application. That is not the objective of this document. That would require a publication as thick as a law textbook, which would become obsolete as soon as we release a new version with any mid-significant changeset.

Such detailed documentation is available online in our [Knowledge base](https://www.easypoint.com/documentation):
<https://www.easypoint.com/documentation>

Instead, here we focus only on the crucial configurations that have a wide impact on the use of the application.

1.1 Features overview

Easy Project is based on WBS, Gantt and Agile methods (Scrum & Kanban). It provides easy task & time tracking and team collaboration.

ESSENTIALS

Project Management

- Gantt chart
- Time tracking
- Time sheets
- WBS & Mind maps
- Meeting & Project calendar
- Organizational structure
- Action buttons
- Custom reports

Agile tools

- Scrum boards
- Kanban boards
- Dashboard for Product Owners and Scrum Masters

BUSINESS

It contains everything as a **Essentials** and in addition:

Resource Management

- Agile resource management
- Resources and allocations
- Attendance management
- Dashboards and reports
- Competency management

Project budgets / Finance

- Project budgets
- Travel expenses
- Hourly rates

Expert PM tools

- Earned value management
- Diagrams
- Test cases
- Custom fields with formulas
- Scheduled reports
- Risk management

PLATFORM

It contains everything as a **Business** and in addition:

Help desk

- Ticket management
- Service queue management
- SLA management
- Reporting and KPI
- Unlimited access for HD Clients
- Restricted access for non-licenced users

B2B CRM

- Account and contact management
- Lead and campaign management
- Lead distribution management
- Opportunity and pipeline management
- Partner and re-seller management
- Price books and quote automation
- Reporting
- KPI management
- Activity management

ENTERPRISE

It contains everything as a **Platform** and in addition:

- Custom SLA
- Dedicated customer success manager
- Integration services
- Software modifications
- High availability cloud solutions

2

Product overview

- 2.1 Redmine benefits
- 2.2 Easy Project features
- 2.3 Easy Project global cloud
- 2.4 Easy Project working space

It is worth reminding what are the key strengths of the Easy Project, including those that may have convinced you to purchase this software.

2.1 Redmine benefits

Here are a few reasons for Redmine's popularity:

- **Open source** — no black box, but a transparent application available to public evaluation.
- **Variable workflow & task tracking** — you will not find any free application (and very few premium ones) with so many business case configuration possibilities, including task types, statuses, workflow, custom fields and permissions.
- **Roles and permissions** — not only for task tracking, but for every section of the application. You can define what each role can view or edit, thus creating different access level combinations to a director, staff member, external co-worker, customer, etc.
- **Data view customization** — most data can be very intuitively filtered, and viewed attributes are also user defined.
- **Extensibility** — plenty of free plugins or commercial upgrades (such as Easy Project) are provided from the Redmine community.
- **Development coordination** — git and subversion connections allow developers to share information into Redmine, for product and quality managers to control the development plan fulfilment.

2.2 Easy Project features

Easy Project is an overall upgrade — it maintains most of the existing features and adds a vast amount of new ones, all in a more user-friendly interface. Expanding its usability to different types of organizations, not only software developers. To be a bit more precise, here is a list of the most significant enhancements:

- **Improved UI and UX** — new design with standard, dark and compact theme. Interactive interface like quick task editing (pop-up) and drag & drop features (Gantt, WBS, To-do list, to name just a few).
- **Dashboards** — My dashboard, Project dashboard, Budget statement, Attendance review and many more. All such dashboards have a standard preset and are fully customizable.
- **Data visualization** — visual reporting with click-through graphs and charts.
- **Integrated professional plugins** — embrace features beyond project management, such as Resource management, Financial reporting, Agile PM, Help desk, CRM, and many others.
- **Imports and integrations** — custom imports from CSV or XML, standardized imports from major applications, integrations with 1000+ apps without any development.

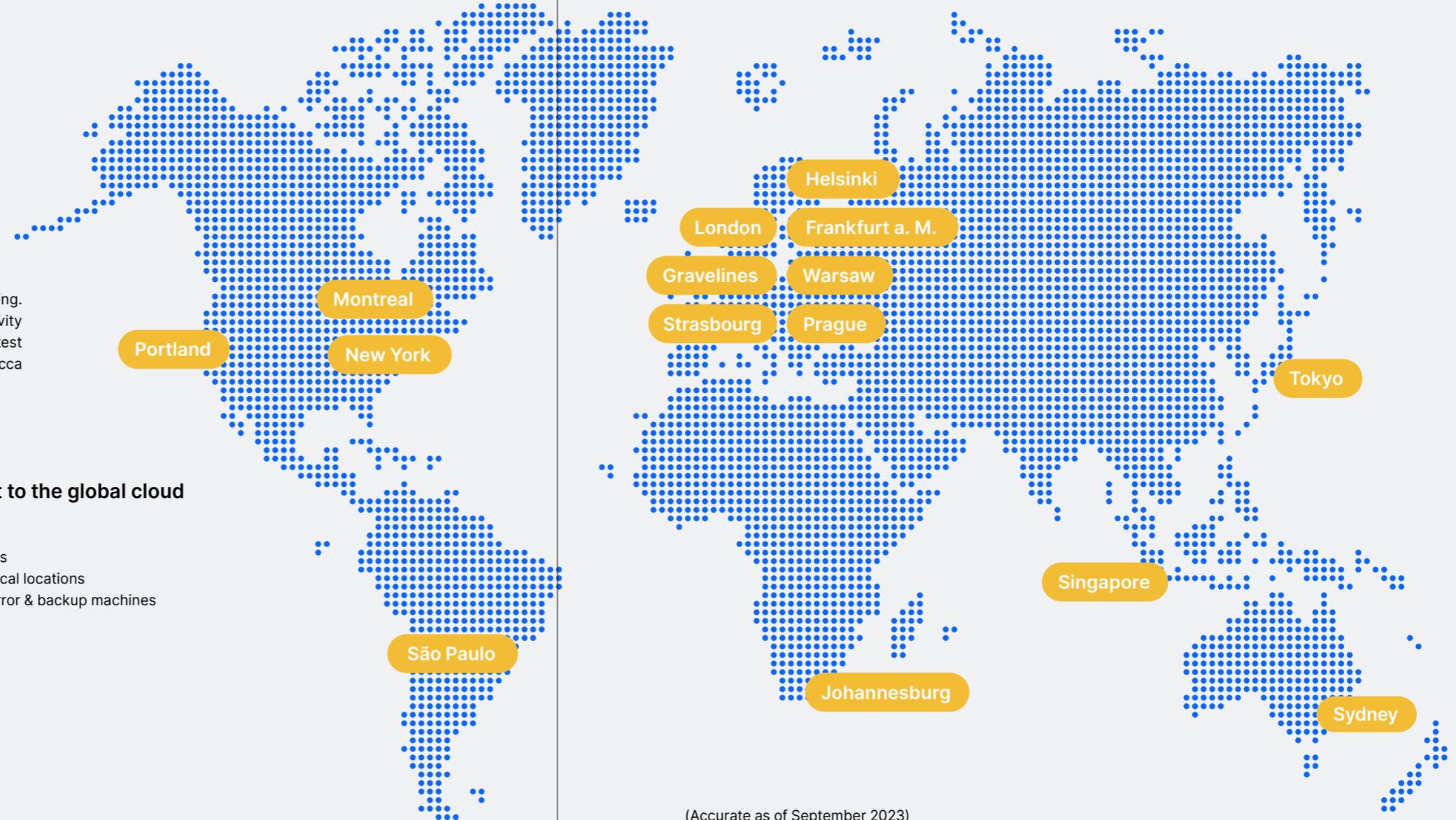
This is still just the tip of the iceberg. More interesting features will be described in the following chapters.

2.3 Easy Project global cloud

Easy Project cloud is the best solution for your hosting. 10+ sites [across the globe](#) ensure the best connectivity and performance. The cloud always contains the latest version of Easy Project, and is updated automatically cca once per week.

Why move your Easy Project to the global cloud

- 99.9% long-term availability
- Encrypted access, data, and backups
- Daily backups on multiple geographical locations
- Redundant hardware with RAID 1 mirror & backup machines
- Guaranteed data reach at all times
- Two-factor authentication



(Accurate as of September 2023)

2.4 Easy Project working space

Dashboard tabs
Dashboard can be split to avoid too much data in one page

Full text search
Fast search for various entities, with saved preferences and advanced operators

Toolkit
Quick access to Calendar, Activity feed, To-do list, Accounts (CRM) and Knowledge base (Add-on)

Plus button
Create new task, project, log time

My profile
Including submenu for dark theme toggle and log out button

Global menu
Access to global (company-wide) view by each feature

Left menu
Contains features specific for each user type

Dashboard
Any page, which you can customize with **Widgets**

The dashboard interface includes a top navigation bar with a search bar and user profile. A left sidebar menu lists various project management features. The main content area displays a Gantt chart for project phases, several summary cards for milestones, risks, and issues, and a time spent gauge. A bottom section shows a bar chart for remaining time on projects.

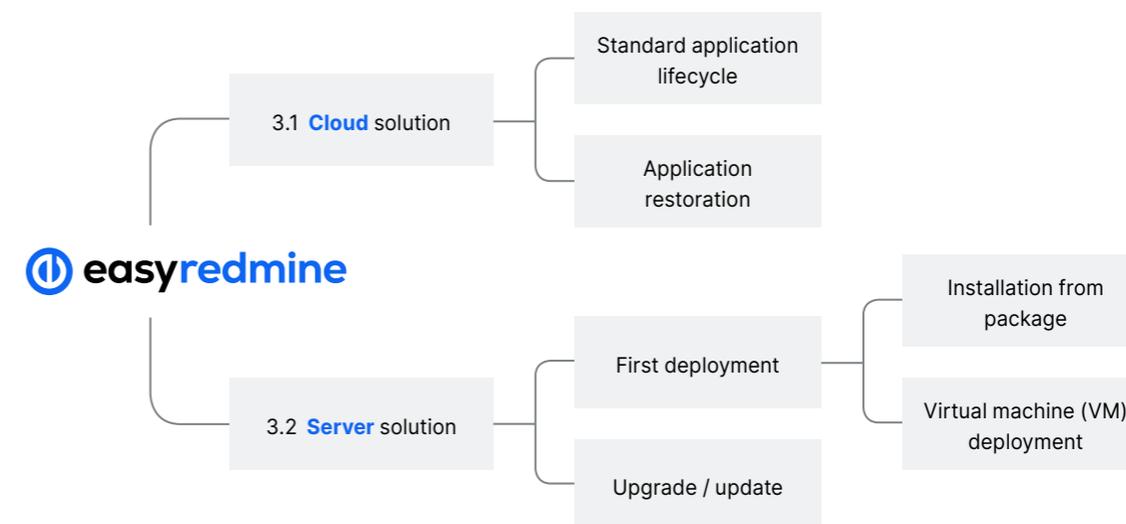
3

Application lifecycle

3.1 Cloud solution

3.2 Server solution

This chapter presents different stages of the application in an overview. Details will be explained in the next chapter.



NOTE: Chapters 3—4 are dedicated to establishing your Easy Project application and contain technical background information. If you already have a running application, you can skip to Chapter 5.

3.1 Cloud solution

3.1.1 Standard application lifecycle

- New trial (trial server) *
- Move to production server (rename, if needed)
 - Set limits & activate relevant functionality according to subscription plan
 - Migrate your data *
 - Application is continuously maintained by Easy Software
 - Backups: DB every 2 hours, attachments every 24 hours
 - 16 days after expiration date application is locked **
 - 30 days after expiration date, application is deleted **
 - Backups are still available 30 days after deletion **

* May be skipped according to circumstances.

** If agreed on service termination, or non-payment of hosting fee.

3.1.2 Application restoration

- Deleted application
 - Locate most recent backup
 - New application (same address)
 - Load backup

3.2 Server solution

3.2.1 First deployment

Virtual machine (VM) deployment

- Download VM
- Import VM
 - Basic server configurations (DNS, SMTP...)
 - Run VM
 - Set automatic backups
 - Set up resources and incidents monitoring

Installation from package

- Download from client zone to server
- Install
 - Use starter data
 - Migrate your data
 - Basic server configurations (DNS, SMTP...)
 - Set automatic backups
 - Set up resources and incidents monitoring

3.2.2 Upgrade/update of application

It is important to realize what current version you have and what version you are planning to install.

Updates between minor versions (13.1.2 > 13.2.0) or bug-fixes (13.2.0 > 13.2.1) are generally seamless.

Upgrading between major versions (12.12.5 > 13.2.0) have most likely technological changes that should be addressed before the installation. Upgrading between more than one major version almost certainly requires change in server.

In any case, before the upgrade, please make sure to read the release notes for every version between your current and the new one. Release notes are available at <https://www.easypoint.com/documentation/11-release-notes>.

In-place update (minor/bug fixing versions)

- Download the package from the client zone
- Full back up of the existing app
- Stop the application
- Install an upgrade
 - Failure — restore from the backup (investigate error logs)
 - Success — continue
 - Start the application

Generally, we recommend first installing the upgrade/update on a test server before attempting upgrade/update of production application.

Upgrading to new server

If the requirements for the new version dramatically differ from your existing server, the best option is to use a new server for the new application version and migrate data.

- Request new VM
 - Download and run VM
 - Migrate data from old server to new VM
- Prepare a new server
 - Install application
 - Migrate data from old server the new one

The exact procedure may differ. If you are not sure, please contact our support and disclose your current version and new version you would like to install.

4

Technical checklist

4.1 Cloud

4.2 Server

By following these instructions, you will get your Easy Project into an optimal state, ready to take on all your users and projects that will be coming in.

4.1 Cloud

This technical checklist is for information purposes only. Most of the steps will be taken care of by us.

New trial (trial server)

In the most usual case, customers start a trial application as a first step. Trial applications are only on trial servers, not optimized for production use. In case you subscribe this trial application for a production cloud solution, it will be moved to production server (more in next chapter).

However, it is also possible to start a production application without first having a trial (more in next chapter).

Production application (production server)

By subscribing an existing trial application for cloud solution, it will be automatically moved to production server. The move temporarily disables the application (for max 20 minutes). Data from trial phase will remain. Functionality from non-paid cloud plan will be disabled (e.g. if you subscribe to ER Business, features of ER Platform will be disabled). User limit will be set.

In case you are subscribing a brand new application, it will be automatically created on production server with all specifics preset based on your subscription (plan, user limit).

Note: If you reach maximum user limit, you will not be able to create new users or unlock existing users, unless you lock some currently active users.

Application domain (URL)

The standard URL of cloud applications is `https://something.easyproject.com`. However, it is possible to use domain of your company, e.g. `https://projects.mycompany.com`. To set this up, some steps must be done on our side and your side as well.

Customer:

- 1) Obtains SSL certificate for domain `projects.mycompany.com`
- 2) Sends the certificate to Easy Software. It must contain
 - a) **Private key** (.key)
 - b) **Certificate** (.crt or .pem)
 - c) **Certificate of certification authority** (intermediate certificate .crt or .pem)
- 3) Configures CNAME in DNS for domain `mycompany.com`
 With our example from above: `projects CNAME something.easyproject.com`

Easy Software:

- 1) Configures Easy Cloud side
- 2) Saves certificate in Easy Cloud

Application maintenance by Easy Software

Responsibility for your application's well-being is solely on our shoulders. We monitor resources, hardware health, perform backups.

Nevertheless, if you find your application inaccessible or generally non-reactive, you can report your issue to our Easy Cloud hotline calling **+420 312 313 671** which is operated 24/7. Please use this hotline only for outage reports, it is not intended for user support.

Automatic backups of database are made every **two hours** and are kept for **30 days**. Backups of uploaded files are made every **24 hours** during night time. Any changes in these frequencies or any other attribute of cloud solution can be discussed with your account manager and provided in a private cloud solution.

Expiration of application

Every application has an expiration date. You can find the expiration of your app in the client zone. This date is calculated from your prepaid period.

In case of unresolved non-payment of the hosting fee, this is the expiration procedure.

- 1) **16 days** after official hosting expiration date, the application becomes locked. But, is still running on the production server.
- 2) After another **14 days** (i.e. 30 days after expiration date) the application is deleted from the server.
- 3) Backups from the application are still available for the next **30 days** after deletion — restoration is still possible.

4.1.1 How application restoration works

If for any reason your application has been deleted and you would like it to be restored, this is the correct procedure.

- 1) Contact support via any official channel, or your account manager and provide the application domain, so we can quickly locate it.
- 2) Our operators will try to locate the latest backups. If the application has been deleted for longer than 30 days, we cannot guarantee that backup will be available.
- 3) Application with the same domain is restored with the most recent found backup.

4.2 Server

4.2.1 Virtual machine (VM)

Download VM

An Easy Project virtual machine has to be generated for your particular plan. If you are interested in this solution, just ask your account manager or contact support by any of the available channels. You will be provided with a download link for the VM. Description of the VM contents is available at <https://www.easyproject.com/documentation/article/easy-virtual-machine-vm>.

Configure network (DNS, SMTP...)

Some configurations can be done in the VM client, others need to be performed directly on the server.

- A) **Set a network** in VM to Bridged adapter.
- B) **Give your app a domain** — make sure that application is really accessible via the domain, such as mydomain.company.com.
- C) **Email notification** — verify that you have correct SMTP configuration — otherwise, the application will not send any notifications.
- D) **Cron settings** — cron is crucial for all automatic background jobs. If it does not work properly, functions such as repeating meetings or tasks will not work either.
- E) **Security configuration** — incorrectly set up SSL will show your users a browser warning on the login screen. Here are our tips for a secure Easy Project server <https://www.easyproject.com/about-us/project-management-made-easy-blog-tips-resources/making-easy-project-server-more-secure-safety-tips-for-your-web-application>.

4.2.2 Own custom server

Download the package from the client zone

After purchasing Easy Project, you (or your colleague who made the purchase) received a login to the client zone. If you don't know the access information, just contact us via chat for example and our operators will assist you.

Client zone contains information about your solution, invoices, and most importantly, access to the installation packages.

The package is in .zip format. Copy it to your Easy Project server.

Installation

A full and detailed installation manual is available directly in the package — in doc/INSTALL. The file is .md format. It contains instructions for both installation and for upgrade. But also, recommendations for server configuration in which we can guarantee optimal performance.

If you think you will need some support for the installation, contact us at support@easyproject.com and our server experts will schedule a time for a remote access session.

This kind of support always requires some kind of access to your server. It cannot be provided by email, chat or phone, because we need to see and control what is happening.

Data

During the installation procedure, you will be asked whether **to load default data**. What to choose?

- A) **Upgrading** — when upgrading, you want to keep existing data, which means **do not** load default data.
- B) **Installation from scratch** — when asked, we recommend you **to load** default data. Application will contain preset configurations that will significantly simplify preparation of the app for regular users.

Web server, network, email configuration

All of these configurations are explained in the INSTALL documentation. For this checklist we would like to remind you of points to doublecheck.

- A) **Give your app a domain** — make sure that application is really accessible via domain such as <https://mydomain.company.com>.
- B) **Email notifications** — verify that you have correct SMTP configuration — otherwise, the application will not send any notifications.
- C) **Cron settings** — cron is crucial for all automatic background jobs. If it does not work properly, functions such as repeating meetings or tasks also will not work.
- D) **Security configuration** — incorrectly set up SSL will show your users a browser warning on the login screen. Here are our tips for a secure Easy Project server <https://www.easypoint.com/about-us/project-management-made-easy-blog-tips-resources/making-easy-project-server-more-secure-safety-tips-for-your-web-application>.

Set up automatic backups

We recommend to set a cron job that will create a database dump and attachments (/files) copy to a remote location in case of any server outage. Choose an interval according to your needs. We suggest at least twice a day — once during the night and once in the middle of the working day. You also might want to monitor the server resources during the midday backup to check if it doesn't use all the resources and slow down application for all users.

Set up monitoring

A simple ping service that sends you an alert if the application is not accessible is good enough. We also recommend some kind of prevention, for example when the memory is leaking or CPU overloads.

5

Administrator's checklist

- 5.1 General
- 5.2 People
- 5.3 Projects
- 5.4 Task tracking
- 5.5 Time tracking
- 5.6 Dashboards

Now that your application is up and running, it is time to get it ready to handle your projects and other business activities.

The ability of Easy Project to adapt to any type of organization has the disadvantage of coming with quite a lot of settings, some crucial and some rather cosmetic. Let us guide you through them.

In this logically ordered checklist, we will highlight the most important configurations you will need to consider. Additionally, we'll also explain some tips for finetuning.

Regardless of whether you are starting, setting the application up, or already using a configured Easy Project, we recommend you to complete this full list. You may find some handy features that you did not know before.

5.1 General

5.1.1 Global settings (General)

Go to: ADMINISTRATION > SETTINGS > GENERAL

- **Application title** — name of the application. It will be displayed in your browser and bookmarks as the site name, e.g. [Easy Software Information System](#).
- **Hostname and path** — it is important that this address is correct. It is used in email notifications for generating links to your application. For example, set it to `is.easysoftware.com`, then a link to the task 123 will be generated as `https://is.easysoftware.com/issues/123`.
- **Beginning of the fiscal year** — this setting will be used in date filtering (fiscal year, quarter). Quite useful in reports and dashboards.
- **Enable Async export** — we recommend enabling this feature and setting the entity count to 100. It means that any data export (csv, xlsx, pdf) above 100 items will work in the background, saving valuable server resources. Detailed technical documentation: <https://www.easysproject.com/documentation/article/release-notes-for-version-11-0#async%20export/import>.

5.1.2 Global settings (Display)

Go to: ADMINISTRATION > SETTINGS > DISPLAY

- **Language** — if all users speak the same language, it makes sense to tick both **Force** settings.
- **Date and time** formats should be selected specifically. If you keep **Based on user's language**, you may receive "bug" reports about inconsistencies.
- **Time zone** – This is the main time zone of your application. If specific user has other time zone set in their profile, offset is counted against the main application time zone.

5.1.3 Global settings (Files)

Go to: ADMINISTRATION > SETTINGS > FILES

Set a reasonable **maximum file upload size**.

Allowed extensions — whitelist; only these file types will be allowed to upload.

Disallowed extensions — blacklist; all except these types will be allowed.

5.1.4 Global settings (Email notifications)

Go to: ADMINISTRATION > SETTINGS > EMAIL NOTIFICATIONS

- **Notification email address (FROM)** — users tend to reply to email notifications and expect that something will happen, so you may want to consider using noreply@...

If you do want to allow users to add comments to task by replying to a notification, you need to enter a real mailbox and connect it to Help desk (if you have a plan with this functionality).

5.1.5 User types

Go to: ADMINISTRATION > USER TYPES

Depending on the current state of data, you may see one or more preset user types. If there are more user types, first determine which of them you will be using (but keep in mind that sometimes less is more; you don't want to manage 10 different user types for 20 users). You should delete all non-used user types, so they are not available in the selection when creating or editing a user.

When setting up particular user type, start with just a smaller number of menu items (custom menu). Also, when entering custom menu items, we recommend using relative paths, i.e. /issues, instead of https://is.easysoftware.com/issues.

An important setting is the visibility of user types. For initial configuration, you can allow every type to see all other types.

Finally, what about the **Internal** setting? These are the restrictions that a non-internal user types have:

- Non-internal users do not see tasks, spent time, attendance and resource management buttons on their user profile.
- Non-internal users do not see saved public filters anywhere, only their own saved private filters.
- Non-internal users do not see estimated hours on assigned tasks and neither in resource management.
- Non-internal users cannot see project activity even if they have the permission on the project.
- Non-internal users cannot log spent time and are not included in Budgets calculations.
- Administrator cannot be a non-internal user even if it's set in their user type.

Detailed technical documentation:

<https://www.easyproject.com/documentation/article/user-types>

5.1.6 Export templates

Go to: ADMINISTRATION > EXPORT TEMPLATES

This setting is not crucial. However, if you are in a larger company with a high level of corporate image, you may be required to set some branded export templates.

For exports of lists, you will need to use the dynamic token %query% that is replaced in the export by the current list you are viewing (for example tasks for billing, report of spent time etc.).

Detailed technical documentation:

<https://www.easyproject.com/documentation/article/export-templates>

5.2 People

5.2.1 Global settings (Authentication)

Go to: ADMINISTRATION > SETTINGS > AUTHENTICATION

Authentication required — YES. This is the standard; users must log in to use the application. Disabling authentication is for cases when your application serves as an open portal with public projects.

By allowing **Self-registration** you give the opportunity for new visitors to create an account. The account must be activated, either by clicking on a link received in your email or manually by an application administrator (USERS > FILTER BY STATUS — REGISTERED > EDIT > ACTIVATE).

You can choose to add self-registered users into a certain user group (administration > groups), that can be added as a member of certain projects under a certain role (more in chapter 5.2.3). This would give the newly registered users defined permissions without having to manually add them into projects as members.

Two-factor authentication with TOTP requires external apps (e.g. Authy, Google Authenticator, etc.) and can be set easily. Step by step instructions are shown to users for their initial TOTP configuration.

Detailed technical documentation: <https://www.easyproject.com/documentation/article/authentication>.

5.2.2 LDAP authentication

You can ignore this chapter completely, unless your company uses Active Directory or another LDAP user structure. If you are using Azure AD, please check the next chapter.

Go to: ADMINISTRATION > LDAP AUTHENTICATION > NEW AUTHENTICATION MODE

Fill in the required fields. We recommend you to enable **On-the-fly user creation**. Otherwise, you would have to manually create users in Easy Project and they would only be mapped and connected via LDAP.

Detailed technical documentation: <https://www.easyproject.com/documentation/article/ldap-authentication>.

5.2.3 SSO (Single sign-on)

Go to: ADMINISTRATION > EASY SSO

Now you are in the configuration center of various SSO technologies that Easy Project supports:

- **Azure AD (via SAML)** – Azure AD is a specific active directory and is better supported by this SAML configuration than regular LDAP configuration.
- **OAuth 2.0**
- **Kerberos**

Please navigate to technical documentation for more details.

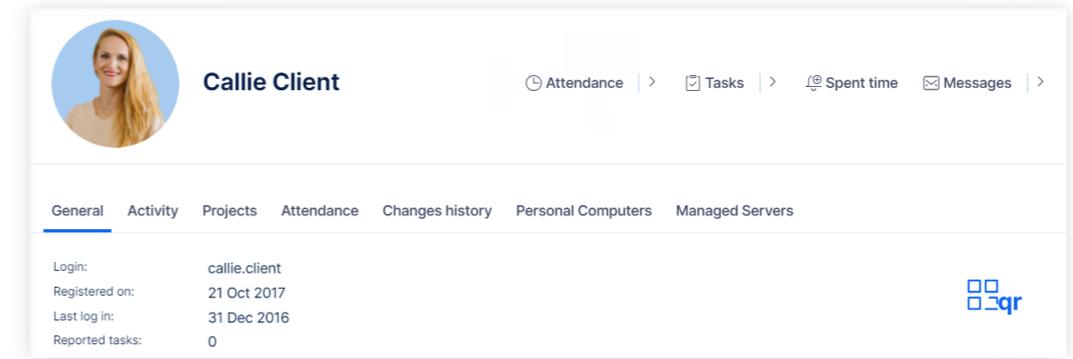
Detailed technical documentation: <https://www.easypoint.com/documentation/article/easy-ss-saml-and-oauth-2-0>

5.2.4 Users and groups

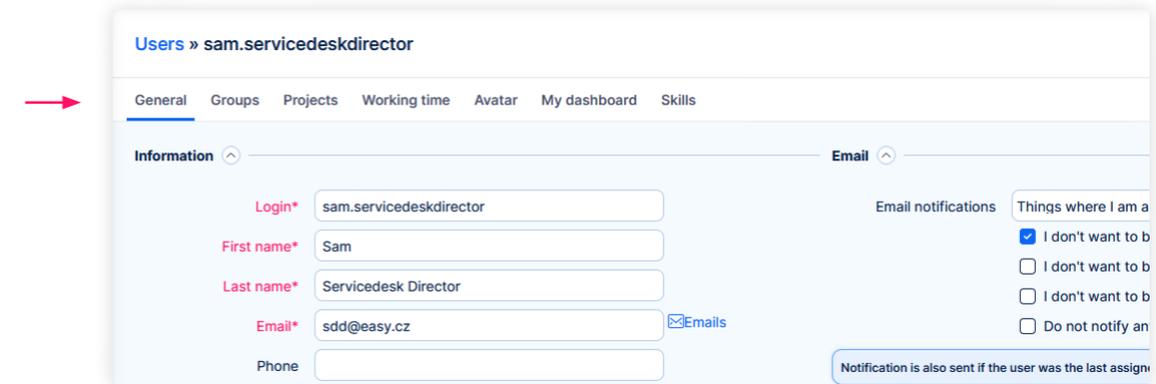
Go to: ADMINISTRATION > USERS > NEW USER

Most important information for user creation:

- **Login and email** — have to be unique.
- **User type** — determines the left menu and other users' visibility.
- **System group** — never apply this for real human users. It is intended for special cases, e. g. when connecting applications via REST API.
- **Administrator** — sees and controls everything. Keep the number of admins on a reasonable level.
- **Partial administrator** — can access selected areas in administration and perform all related operations in that area.
- **Authentication mode** — if applicable, here you select the LDAP modes.
- **Time zone** — if none is selected, time zone from global settings is used ([chapter 5.1.2](#)). We still recommend to set a particular zone for each user, to be completely sure that no obscure discrepancies will occur.
- **Mail signature** — this is important especially for help desk operators who send messages from Easy Project to outside customers.



Once the user is created you will find some new tabs at the top of the form, where you can quickly assign the user to groups, projects, working calendar or see the layout of their home page. More about these topics will be explained in the chapters to come.



Let's just focus on user groups for now. Administration of user groups is very simple — ADMINISTRATION > GROUPS > NEW. Name the group and add users after you create it.

User groups make it easier to filter tasks or spent time or any other entity — instead of selecting users one by one, just select a group. Or it helps in the task assignment process — assign a task to a group and let the members choose which particular user takes it. But most importantly, groups allow quick/automatic assignment of users to projects. You just need to add the group into respective projects under a certain role, and all users who become members of the group will automatically become members of

each of these projects. The same logic applies when users are removed from groups. Also, when you delete a group, all its users will be removed from the projects.

When you are setting up your application, you might want to consider creating some basic groups which will make your life easier for the future project membership administration.

5.2.5 User custom fields

Go to: ADMINISTRATION > CUSTOM FIELDS > USERS (or NEW CUSTOM FIELD > USERS)

In addition to the native attributes, you can add a custom attribute, like phone number, department, job title, etc. This will be the case for other entities in Easy Project as well (tasks, projects, milestones, etc.). It is always tempting to let your imagination run wild when given the chance to customize, but at this point, just keep it simple. Create only those custom fields that are absolutely necessary. You can add others later. You will probably use formats like Text (for job title) or Key-value list (for department). You will find these fields on user edit form.

Detailed technical documentation: <https://www.easypoint.com/documentation/article/custom-fields>.

5.2.6 Dashboard templates

Go to: ADMINISTRATION > DASHBOARD CUSTOMISATION > MY DASHBOARD

Every user has their own dashboard — a sort of personal workspace. It is the first page you access when you log in, and it's always available in the left menu. This page is customizable, so every user sees exactly what they need to.

List of templates on dashboard My dashboard			
Dashboard customisation > Dashboard templates My dashboard			
Template name	Description	Default value	
C-Level Manager	C-Level Manager, PMO or Project Portfolio Manager homepage		<ul style="list-style-type: none"> Widget layout Apply template to users Edit Duplicate

Our recommendation is to disallow your users to change their own dashboard at least during the first few months (via roles and permissions — chapter 5.2.8). Users in the same position should have unified dashboards. Otherwise, some may make changes that will disrupt their work (for example they may hide some tasks they should be watching).

If you decide to build your own dashboard templates, we again recommend to keep it simple. If there are too many widgets, users will get lost. Also, if there are long lists, users get lost — keep a reasonable items limit for each list (between 10—15). When you gather reasonable feedback, you can make incremental improvements.

5.2.7 Working calendars

Go to: ADMINISTRATION > WORKING TIME — TEMPLATES > (NEW)

Working calendars allow you to set a working regime for the whole company (Monday—Friday, 9—17 with 0.5 hour for lunch), set specific calendars for part time users and even set a custom calendar for specific users. Setting of user's calendar determines the reports of attendance and spent time of the user (more in chapter 7.4.3).

New calendar

Name* Standard

Work starts at* 09:00

Work ends at* 17:30

Number of working hours per day* 8

Working days of the week

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

First day of week* Monday

Default calendar

Notes:

- **Work starts/ends at** — the difference between these values is the total hours user should be at work, in our example 8.5 hours. Also, when logging half-days in the morning/afternoon via Attendance, it prefills the according time period.
- **Number of working hours** — How many hours you are supposed to work — how much **time** should be logged on tasks and projects in one day. In our example, you can simply calculate that 0.5 hours remains for lunch.
- **Working days of the week** — The days you do not select are practically weekends.
- **Default calendar** — if ticked, this calendar will be automatically assigned to every new user.

Detailed technical documentation: <https://www.easypj.com/documentation/article/working-time-calendar>.

5.2.8 Roles and permissions

Go to: ADMINISTRATION > ROLES AND PERMISSIONS > (NEW)

If you don't have any roles yet, you will need to create a new one. This setting is rather complex, because it concerns a wide variety of areas throughout the whole application. The most used areas are Project, Task tracking and Spent time.

The individual permissions are quite self-explaining. But there are some general principles you need to understand.

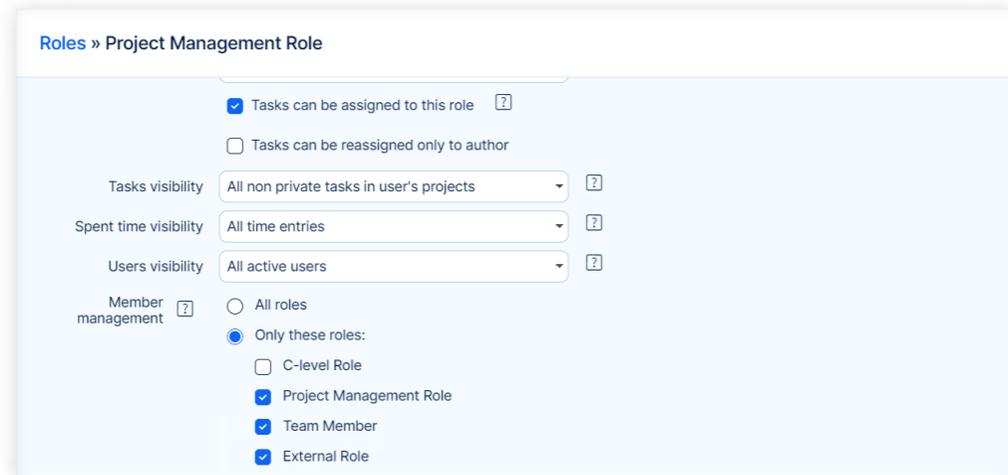
Global vs Project permissions

All the particular permissions are divided to two main groups:

- **Global** — these permissions do not have a project context; they can be used in the application overall. For example, [Use to-do list](#) — it is a feature not tied to any specific project, it is available anywhere in the application.
- **Project permissions** — these are applied only to the specific project where the user has this role. For example, [Create tasks](#) — tasks are always tied to a project, you cannot have a task without a project. If you are in a manager role on project A and a worker role on project B, you can only create tasks on project A, because workers are not allowed to create tasks (as an illustrative example).

You may be thinking "[Fine, but roles are always defined on projects, so how does global permission work?](#)" That is a good question. The answer is fairly simple — global permissions are applied from all roles that you have on at least one project. So, all it takes is to have the CEO role on one project and you have all the global permissions of the CEO.

[That's not too secure, is it?](#) We got it covered. Ability to give roles to other users in the project is also under permissions — Manage members, and even there you can define which roles can be given. Also, keep in mind, an administrator can give any role to any user.



Using our evergreen principle — keep it simple, from the beginning it will be enough to use three role levels (Top manager, Team leader, Team member) to start with. Then based on your experience you can make tweaks and possibly add new roles for specific cases.

Special roles — non-member, anonymous

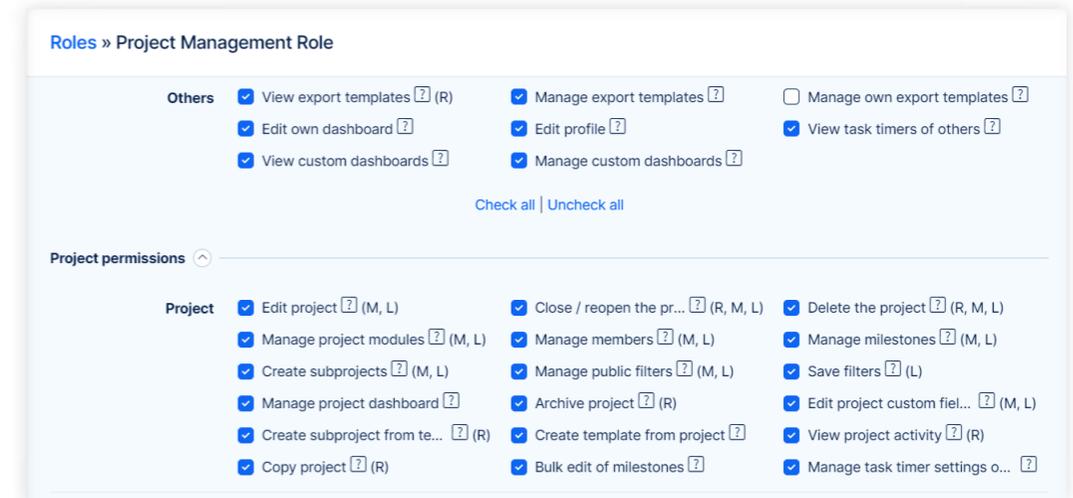
In the roles and permissions list, you will always see two unusual roles that you can't delete. What do they mean? Back in chapter 5.2.1 (Authentication settings), we mentioned disabling authentication — the app will be accessible without login. Well, a user who is not logged in the application is considered **Anonymous** and their permissions are applied from this very role. If your app requires you to log in, this role doesn't concern you at all.

Non-member — global permissions are applied to all registered users in the application. Project permissions are applied to users who are not members of the project but can see it.

Both of the aforementioned roles can see contents of **Public** projects and their project permissions are applied to them. Regular projects are not public, but you may decide to set some projects as public (**chapter 6.1.2**) to make them available to all users without making them members.

What do R, M, L stand for?

You may see some mysterious letters next to some specific permissions.



- **R** Read only — this permission allows you to see data, but not create, edit or delete anything.
- **M** Member — you have to be a member of the project => this permission doesn't apply to non-member and anonymous roles.
- **L** Logged in — you have to be logged in the application > this permission doesn't apply to the anonymous role.

5.3 Projects

5.3.1 Global settings (Projects)

Go to: ADMINISTRATION > SETTINGS > PROJECTS

- **Default modules and task types** — choose only those that you are sure that will be used for all projects. Otherwise, some simple projects will look more complicated than they actually are. These settings don't affect projects from a template.
- **Activity is selected when creating a task (or editing a task)** — we recommend you to keep this disabled, otherwise you may have problems with creating/editing tasks via Gantt, WBS or Quick planner.
- **Assign activities to roles** — keep it simple, keep it disabled. It makes sense when you reach a certain point — too many roles, too many activities. Or when you have very strict time tracking rules.
- **Display custom project identifiers** — keep it disabled, it only complicates project creation. It is used in very specific cases only.
- **Role given to user who creates a project (a subproject)** — make sure you select a role. Otherwise, the first in the list of roles will be assigned.
- **Calculate project start/due date from tasks** — there are pros and cons to this setting. **When enabled**, you don't have to worry about task start and due dates; you will not be warned that task dates are out of the project date range. However, you will not be able to filter and sort projects by dates. **When disabled**, you can filter and sort projects by dates, but you will get error messages when attempting to save task dates out of the project range (for example when moving task from a different project).

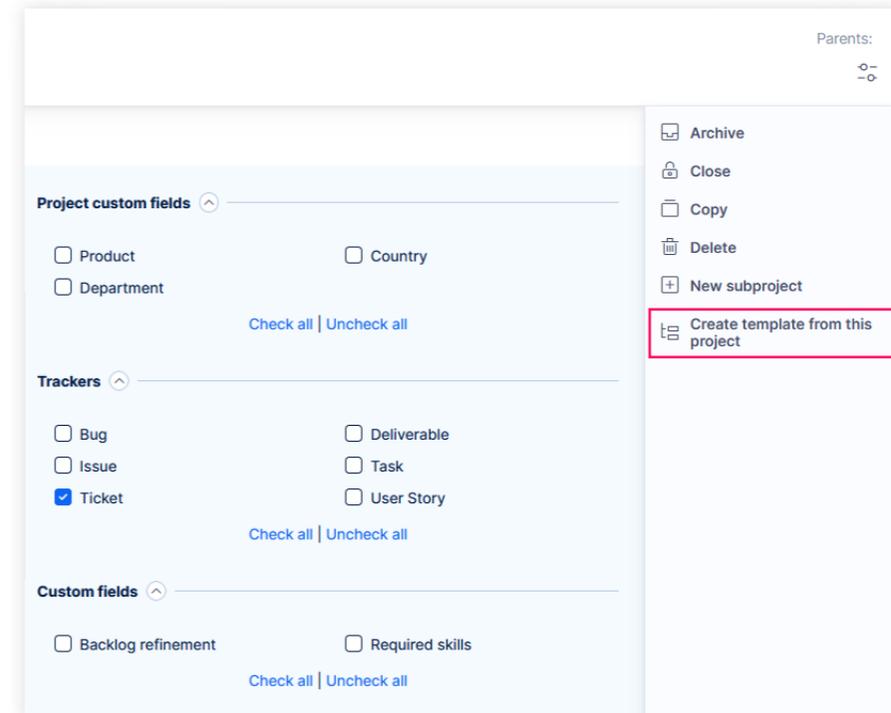
5.3.2 Project templates

Go to: ADMINISTRATION > PROJECT TEMPLATES

How to get templates into your application?

From existing project

Go to: an existing project in your application > SETTINGS > EDIT PROJECT > CREATE TEMPLATE FROM THIS PROJECT.



Import

Project templates can also be imported from other Easy Project instances. Import button is located at the top right on project templates list. To export, right click on a project template in the list and select Export template.

5.3.3 Project priorities

Go to: ADMINISTRATION > CATEGORIES > PROJECT PRIORITY

Nothing scientific here, just set 3—4 project priorities. For historic reasons, the ordering is that the highest priority is the bottom, the lowest priority is the top in this setting.

5.3.4 Project custom fields

Go to: ADMINISTRATION > CUSTOM FIELDS > PROJECTS (or NEW CUSTOM FIELD > PROJECTS)

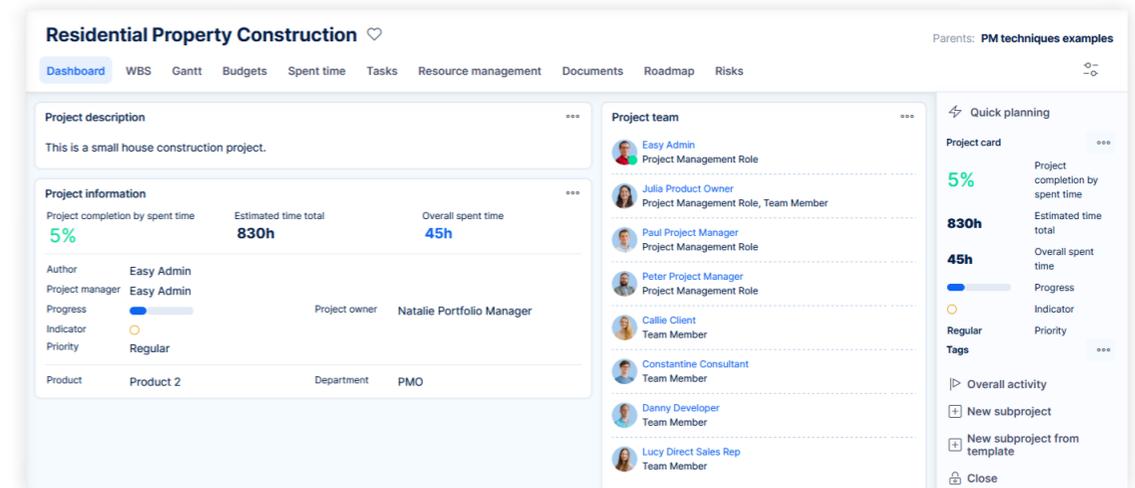
Decide on how you want to categorize your projects (but not overcategorize). Some regularly used examples include, for example, Project Phase (Key-value list), Shipment date (Date), Project type (Key-value list).

Detailed technical documentation: <https://www.easypoint.com/documentation/article/custom-fields>.

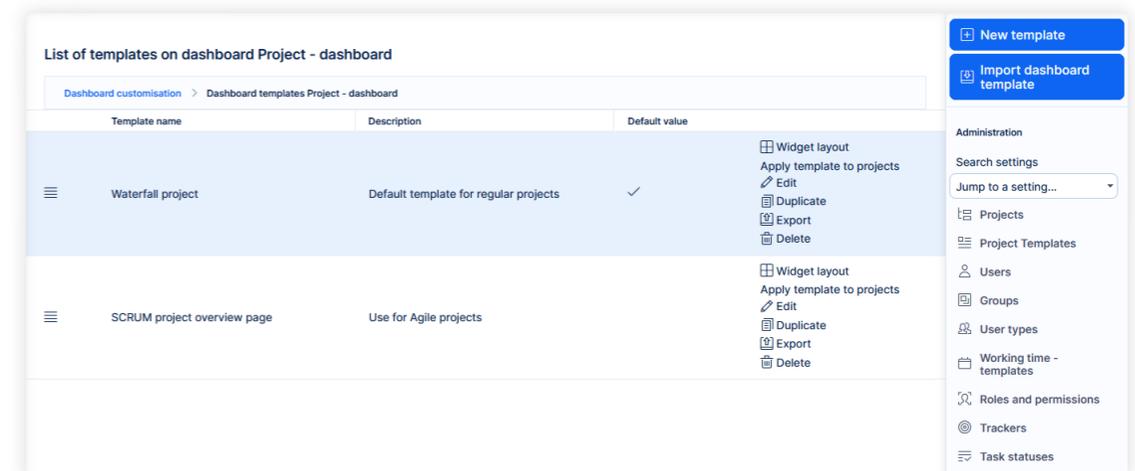
5.3.5 Project dashboard templates

Go to: ADMINISTRATION > DASHBOARD CUSTOMISATION > PROJECT — DASHBOARD

Project dashboard is the first page of a particular project.



Default dashboard template is applied on new projects. Dashboard templates can also be applied to existing projects. From our experience, we definitely recommend using these widgets: [Project description](#), [Project information](#) and [Project card](#) on the dashboard. [Project members](#) or [Subprojects](#) can also be a part of this page.



5.4 Task tracking

5.4.1 Global settings (task tracking)

Go to: ADMINISTRATION > SETTINGS > TASK TRACKING

- **Show task ID** — this is practical when you work with smaller tasks, it helps you navigate and refer to specific tasks quicker and easier. We recommend enabled when using Help desk.
- **Display subprojects' tasks on parent projects by default** — the less invading option is to keep this disabled. Whenever you open a task list on a project, you will only see tasks on that particular project, no other tasks will be shown. If needed, you will always be able to include tasks from the subprojects via a filter.
- **Use color scheme for** — we recommend you to use **Priority** for task coloring.
- **Allow to set task due date after milestone date** — this setting seems very specific; but it has an impact if you are going to use milestones on your projects. By enabling this option, you will not be stopped when moving the due date of a task beyond the date of its milestone. Instead, the milestone will be moved accordingly. If disabled, users will receive an error message if they set task due date after date of its milestone.
- **Private tasks** — it is a complication and you need to set according permissions for it. We recommend you to keep this disabled. See in the course of a couple of months, whether this feature is really required from your users.
- **Cross project subtasks** — to keep tasks in order, you should keep this disabled. To connect various tasks between projects, you can always use task relations. Parent-subtask tree is best to keep in one project.
- **Allow cross-project tasks relations** — a good substitute for the above setting.
- **Allow task assignment to groups** — this will only work when the group is added as a member of the project (**chapter 5.2.4**). If all users from the groups are added individually, this will not work.

- **Calculate the task done ratio by** — **Use the task field** = users manually enter %done on the task based on their qualified estimate. **Use the task status** = on each task status you set how big task completion it represents. For example, New = 0%, In progress = 50%, Review = 90%. With this setting you cannot enter %done manually.
- **Ignore workflow for administrators** — workflow, as you will soon find out, has strong impact on working with tasks. By enabling this setting, you are taking a risk that an administrator will change the task in a way that regular users will not be able to work with anymore. We recommend you to keep this disabled.
- **Task export limit** — if you have enabled Async export (**chapter 5.1.1**), this limit is no longer relevant and you may leave it empty. The limit is important if you export the old way. In this case, large exports (10.000+ items) can block application not only for current user, but other users as well. The best solution is to enable async export.
- **Parent tasks attributes** — to have more control over individual tasks keep the settings independent. By choosing calculated from subtasks, users will not be able to manually set those attributes on the parent task, and may be confused by this situation.

5.4.2 Task types

Go to: ADMINISTRATION > TASK TYPES

The next three chapters are going to be closely interconnected, so just read these lines patiently and it will all become crystal clear in the Workflow chapter.

If you are just starting with Easy Project to manage regular work of a team up to some 25 users, you won't really need anything more than one task type, called **Task**. You may eventually find that you would like to better differentiate the type of work your users will be handling. How- and whenever you come to the realization of the need to specialize your work assignments better, it will start with task types.

Task type can be simply understood as a type of a work assignment, for example, Audit, Documentation, Architectural proposal, Construction, Workshop, Programming, etc. Task types are user defined; you have complete control over them.

Attributes of a task type

- **Default status** — when creating a task in this task type, this status is prefilled.
- **Icon** — used in Kanban.
- **Standard fields** — the fewer fields you have on tasks, the cleaner the task detail looks – fewer distractions. A functional minimum is to enable [assignee](#), [description](#), [start/due date](#). Enable the field [parent task](#) if you are planning to build task structures (parent-subtasks for example in WBS). Enable [estimated time](#) if you are going to plan work in Resource management. [%Done](#) has a functional effect with Earned value management. For advanced project management you will also take advantage of [milestone](#), which are neatly managed in Gantt.

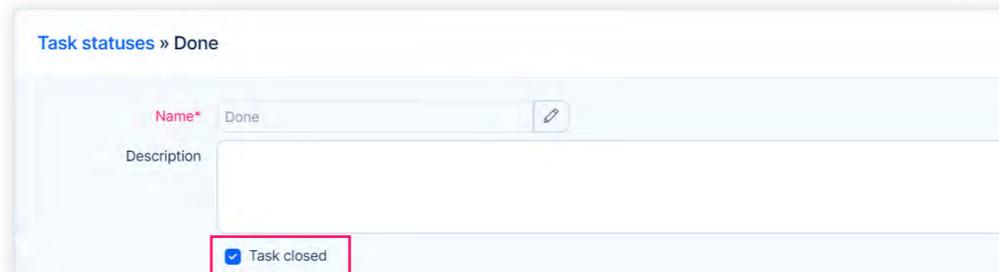
Task types can be enabled/disabled per project. And they can have their own set of custom fields.

5.4.3 Task statuses

Go to: ADMINISTRATION > TASK STATUSES

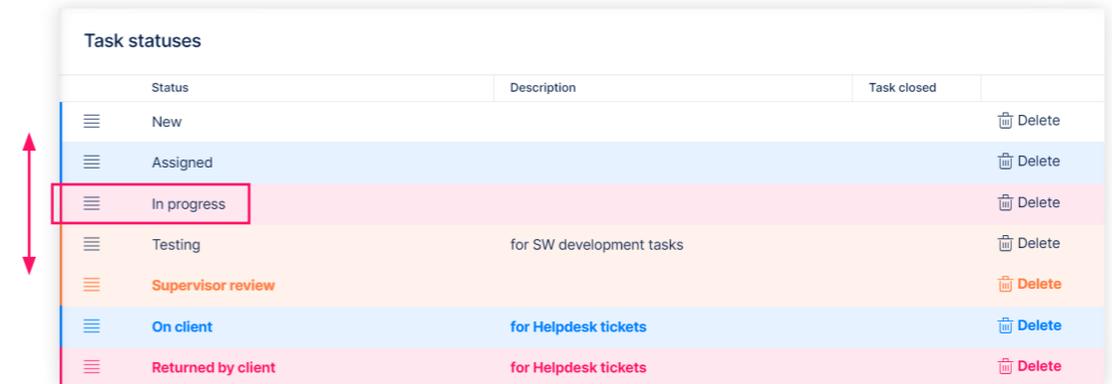
Custom definable task statuses are what makes Easy Project such a powerful and flexible tool. Our experience from hundreds of customer implementations indicates an initial solution consisting of four statuses: New > In progress > Approval > Closed.

We recommend to start with equivalents of such stages, named according to your own practice. The last one should have the **Task closed** option ticked.



Separating open and closed tasks is important for effective task listing and reporting and has useful functional consequences.

Statuses can be sorted by dragging them in the list, to make their selection by users more intuitive.



5.4.4 Workflow

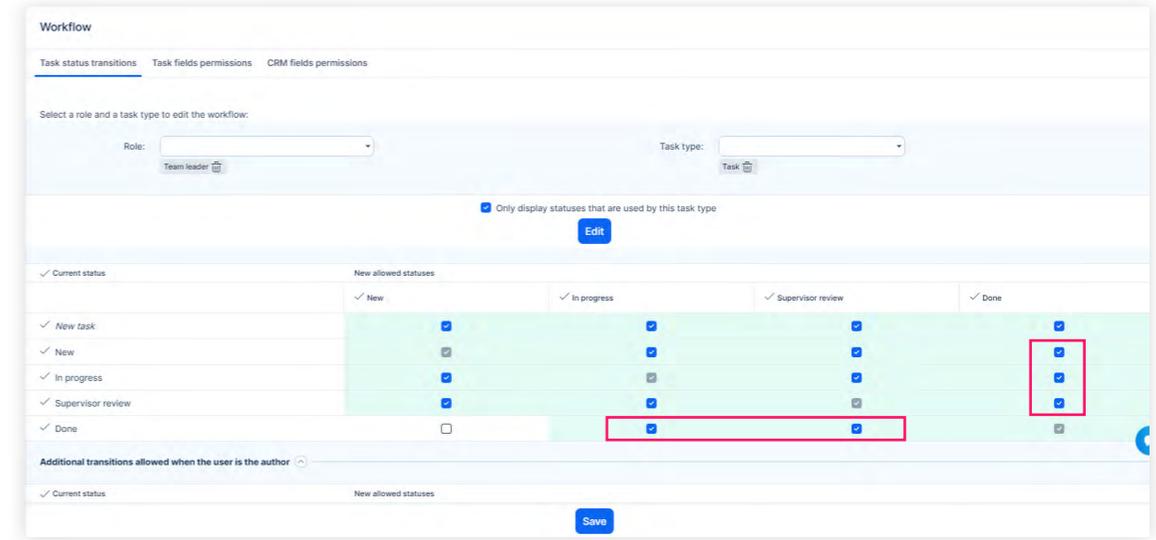
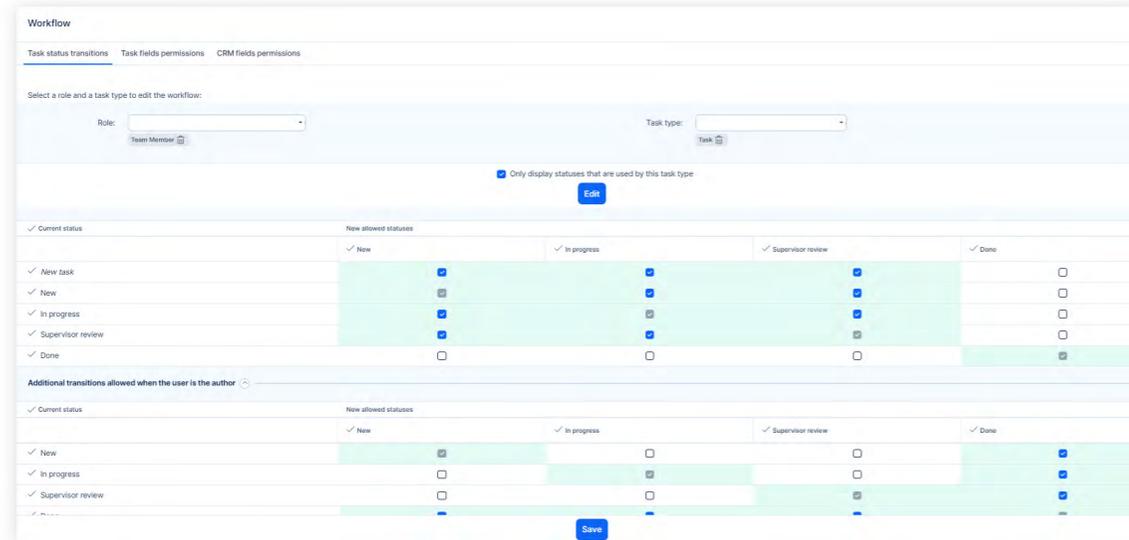
Go to: ADMINISTRATION > WORKFLOW

Now that we are familiar with task types and statuses, we can define the task lifecycle, i.e. how the statuses may progress. Workflow puts together the user's role, task's type and current status and evaluates what the user can do with the task.

Let's just explain this in a simple user story. Team members answer to their team leader = their work must always be evaluated by the team leader.

This can be ensured via workflow. You disallow team members role to close tasks, but only allow them to use status **Review** to hand over their work. Team leaders will have a queue of tasks in that status from their team members, and only team leader role can close the task.

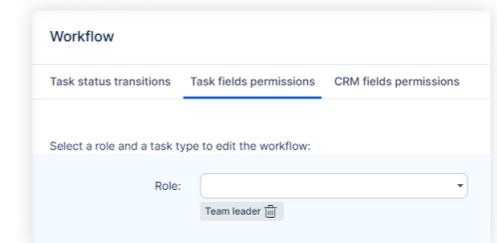
This is how it looks in workflow setting — a team member has all the options to close the task disabled, while team leader has this option available. Also, the team leader is allowed to reopen already closed tasks.



By default, newly created statuses are always disabled for all roles and all task types, which is why it is necessary to **configure workflow every time you create a new status**.

But that is not the only function of workflow. Switch to the second tab — Task fields permissions — to control which fields can be edited freely, which are read-only, and which are required.

We need to warn you about the **required** option. It may be a cause of frustration for users when they receive the error messages too often (due to empty required field when they changed status), which then may result in a less smooth adoption of the application. Please take this into consideration before setting any field as required and use in moderation. Keep in mind you want to simplify life with Easy Project, not complicate it.



5.4.5 Task priorities

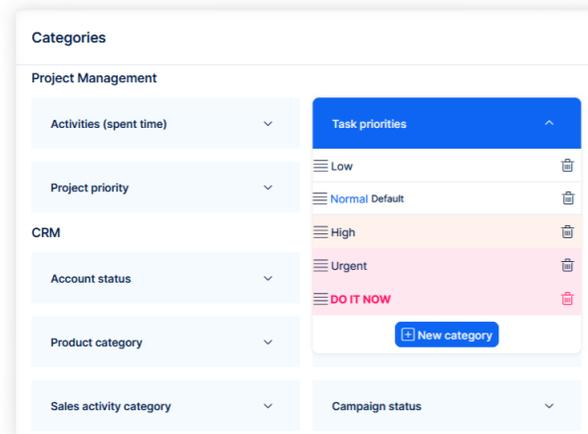
Go to: ADMINISTRATION > CATEGORIES > TASKS PRIORITIES

Priority is another of the required attributes of every single task. The most common number of priorities is about 3—5, equivalents of **Normal**, **High**, **Low**, **Urgent**, or similar. The most regular priority should be set as default, in our case **Normal**.

To use more than 5 priorities, it is necessary that all users fully understand what each priority means to avoid misuse. You may also consider the option of setting workflow to only allow selected roles to edit priority.

Priorities are manually ordered (like statuses), however, their order in the setting is reverse to the order in the task list. Let us explain in the example below.

Low priority is at the top of the list, **DO IT NOW** is at the bottom. It is quite clear which is the highest. When sorting tasks in a list by priority, ascending order is from Low to DO IT NOW, descending order is from DO IT NOW to Low.



Yes, it looks illogical, but it is already used by too many companies this way, so switching it in the application would cause too much unnecessary work for all admins. After all, it is just a one-time setting that no one really has to care about after the initial set up.

5.4.6 Task custom fields

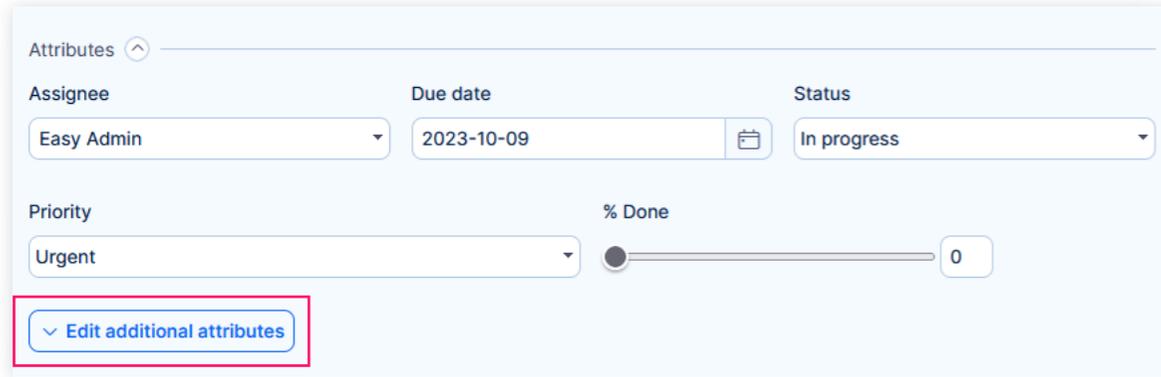
Go to: ADMINISTRATION > CUSTOM FIELDS > TASKS

Custom fields are additional attributes of tasks, just like in projects. Every attribute of the task should be intuitively understood by users who can see/edit it. When you have too many of them, users will get confused and will rather ignore all of them.

A great feature of task custom fields is they can be enabled/disabled per projects and task types. They are also a part of workflow fields permissions settings. Which altogether allows you to use them only where they are really necessary and leave them out of tasks where they would only obstruct.

This functionality is vast, and you can experiment as much as you can to build a comprehensive task database. But that would take too much space in this initial setup manual. So, here are some short tips from us based on experience and frequent misuse:

- **Required** — if you decide for this option, make sure to set a default value for this field. Otherwise, you are complicating the creation of tasks. Even worse, you would be completely forbidding task creation via email (from Help desk) or from an external system via API.
- Instead of format **List**, use **Key/value list** — regular list is kept for historic compatibility reasons. Key/value list works much better when you need to edit a possible value.
- Set **Use as filter** reasonably — it is another tempting option to enable, but do you really think someone will filter tasks according to a Text field? Too many available filters complicate working with a task list and, in extreme cases, may slow down loading of task lists.
- There is an interesting option **Show as additional attribute** — it comes handy with fields that are generally filled in during task creation (for example for categorizing purposes), but then during the course of the task, nobody needs to touch them at all. This option will hide the field when updating a task under the **Edit additional attributes** button, so that the user can focus on the important fields.



- How to connect tasks with other entities? Simply, use the **Lookup** custom field. It enables you to link tasks with other types of entities in the application, e. g. documents, users, contacts.

Detailed technical documentation: <https://www.easypoint.com/documentation/article/custom-fields>.

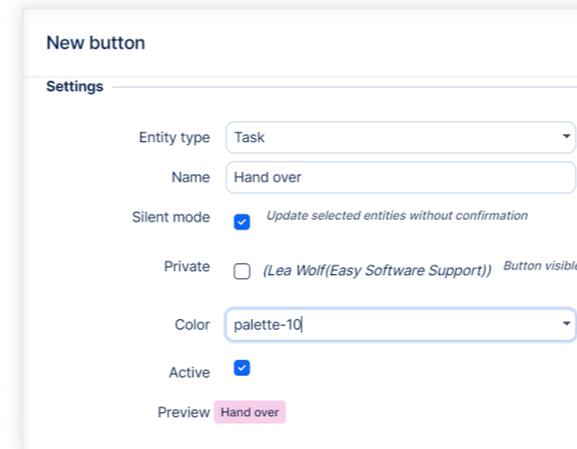
5.4.7 Action buttons (Easy buttons)

Go to: ADMINISTRATION > EASY BUTTONS

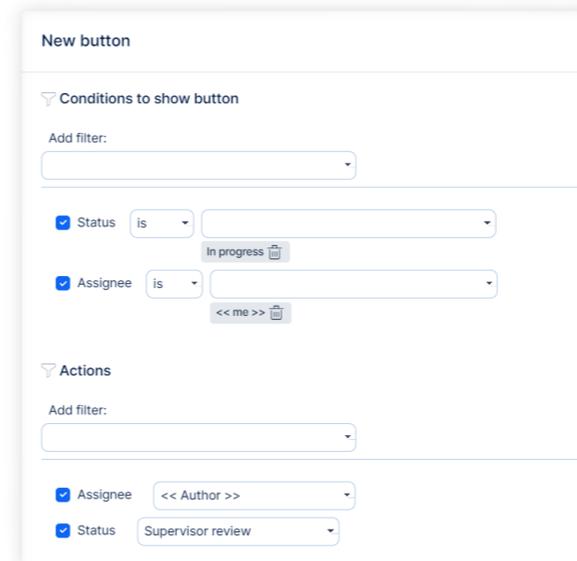
In this chapter, we are going to slightly break the rule of this manual — setting up an initial state of the application. However, knowing about this handy functionality may come in useful within the first days of using the application.

Action buttons are great timesavers for often repeated operations with tasks. They allow you to make multiple changes in tasks just in one click. Here is an example. Your process dictates that after you did your work on a task you must return it to the author (person who created the task). Normally you would need to click **Update**, select Status, select **Assignee**, click **Save** = six clicks. With the action button, it is just one click.

Action buttons set up

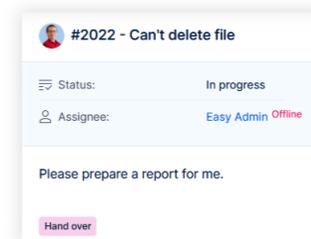


- **Entity type** — choose **task** and name it.
- **Silent mode** — if disabled, you will be able to enter a comment and will need to confirm the change (one additional click).
- **Private** — no other users except the creator of the button will see it.
- **Active** — you may choose to temporarily disable some buttons by unchecking it, instead of deleting.
- **Conditions to show button** — the button will only be shown on tasks if all these conditions are met. Example: I can only use the button on tasks assigned to me which I am currently working on.
- **Actions** — what happens when you click the button. Example: Task is reassigned to the author for confirmation.



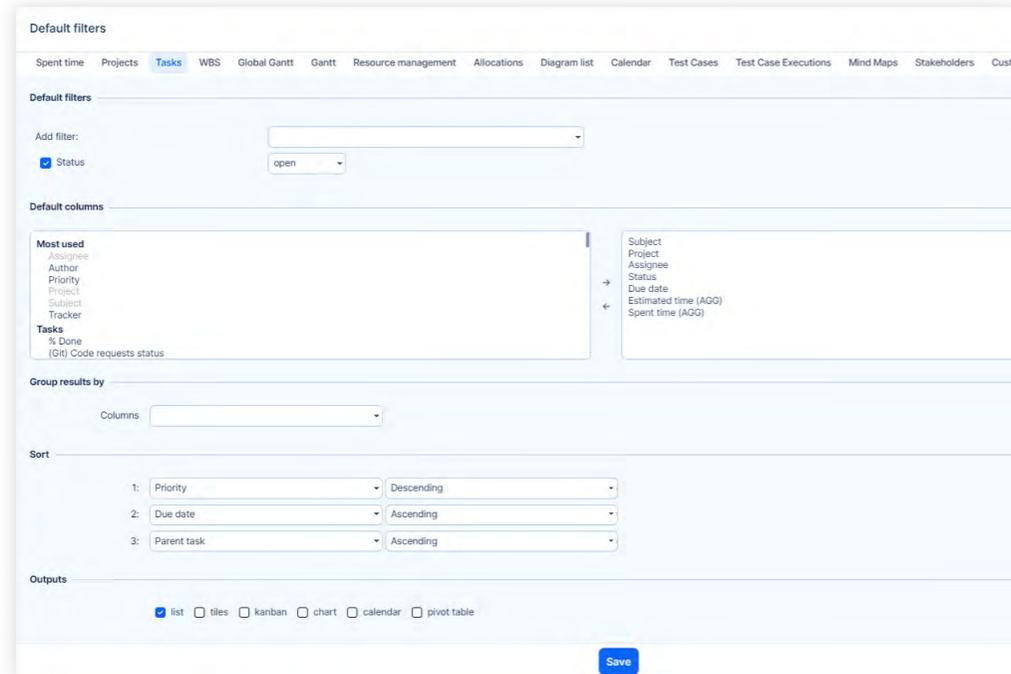
The button is shown under the task attributes.

You can surely see the value of this feature, but you don't need to spend time on it now. Wait a week or two, ask your users what their most repeated changes are and then set up the buttons, based on real experience. Our recommendation is that users should not see more than two or three buttons at once.



5.4.8 Task filtering

Go to: ADMINISTRATION > DEFAULT FILTERS > TASKS

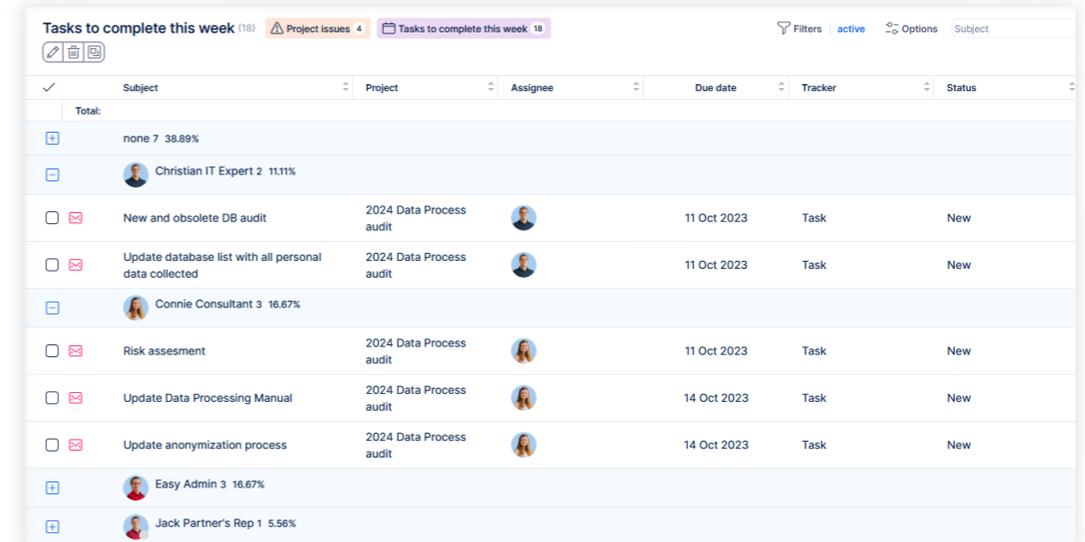


This is where you set up the default filter — the default form of the task list, when opened by any user. Definitely set the filter **Status — open**, you don't want to see old, closed tasks by default. As for shown columns — keep in mind the width of your users' displays. Another topic you should think about is whether (and where) to put the column **Project**. If it is in the first column, users may click on the project instead of the task and get lost this way. You should consider putting task name (**Subject**) in the first column.

Naturally, users will be able to set filters and view columns ad-hoc according to their needs at the time. But you can help them to a good starting position.

Go to: ADMINISTRATION > SAVED FILTERS MANAGEMENT > TASKS

Here you may predefine other types of task listings (including charts, or pivot tables). Saved filters are shown on the right sidebar of the task list or presented at the heading.

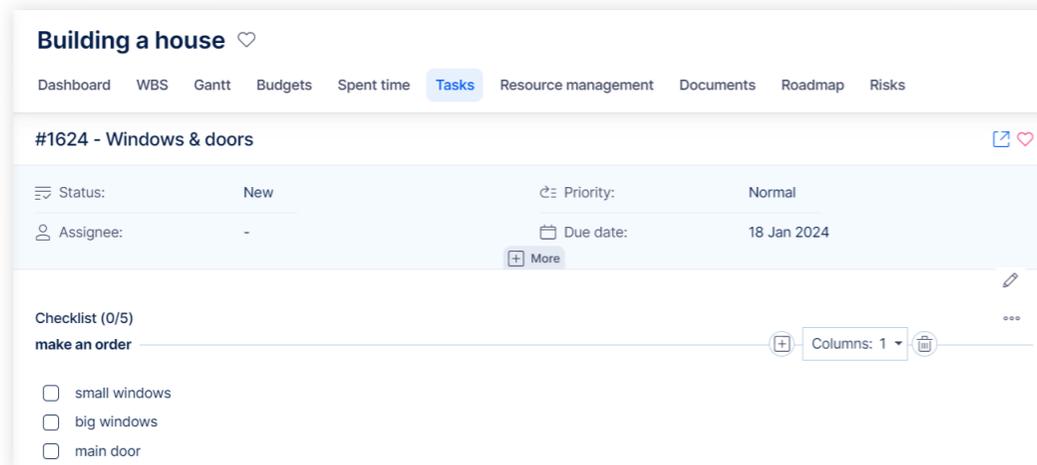


There are infinite possibilities of viewing task sets, you can really go wild here. But as you very well know, we will ask you to not get carried away at this moment. For starters, we recommend you to create filters for **Overdue tasks per user**, or **High priority tasks per user**. Leave the more complex reports for later, based on your practice.

5.4.9 Checklists

Go to: ADMINISTRATION > CHECKLIST TEMPLATES

Checklists are definitely worth mentioning. They may simplify the task description and ensure 100% delivery of each task. Here's how it looks on a task.



You may consider using checklists on certain types of tasks, and checklist templates for those using the same procedures.

In the setting of a checklist template, you will predefine the templates that will be usable when creating a task. There are also some simple settings — whether (un)marking of items should be captured in the task history; and whether task's %done ratio should be updated when (un)marking items.

The condition to use checklists is to enable the project module **Easy Checklists** on the project (PROJECT SETTINGS > MODULES).

Now that you are aware of this useful feature, it doesn't mean you have to enable it on all tasks. Don't make it just another item that users must fill in, enable it where it is most useful.

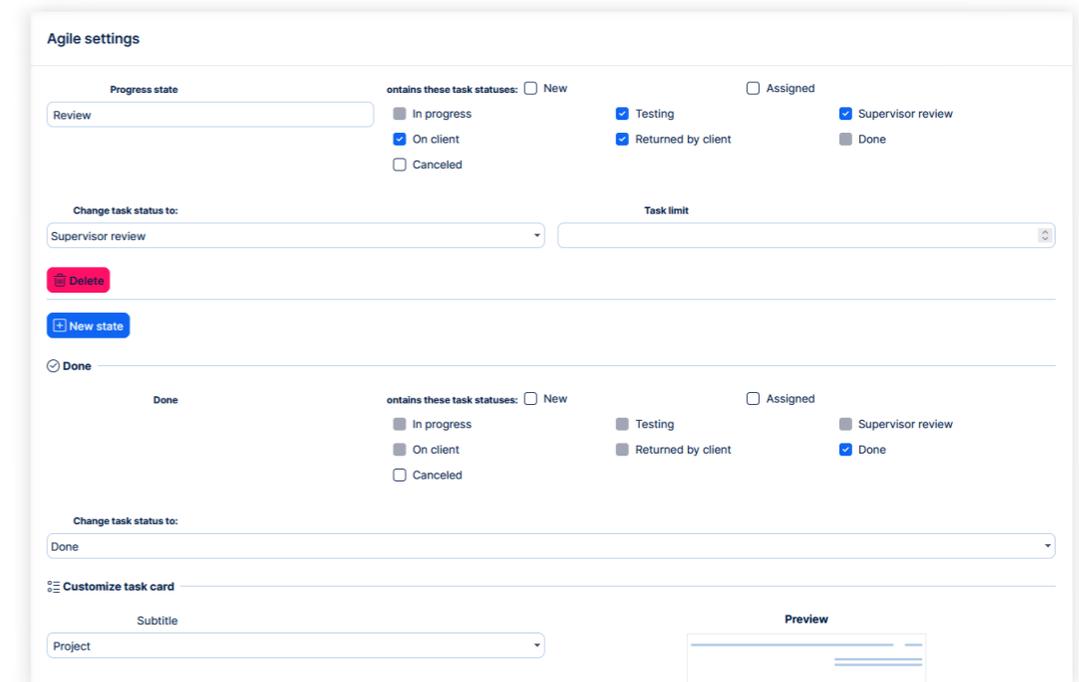
Detailed technical documentation: <https://www.easypoint.com/documentation/article/checklists>.

5.4.10 Default Kanban settings

Go to: ADMINISTRATION > DEFAULT KANBAN SETTINGS

Kanban is a way of visualizing continuous flow of tasks in certain predefined stages. In, Easy Project we have two approaches for using Kanban on a project:

- **Custom Kanban board** – You organize any set of existing tasks of the project into one or multiple Kanbans. In this case there is no predefined configuration of each Kanban.
- **Project Kanban with backlog** – there is only one Kanban on the project. Tasks have to added into the Kanban explicitly. This setting defines the default behaviour of project module Kanban on new projects (or projects where the kanban module becomes activated). First you choose one of the approaches. Then, in case of Kanban with backlog, you can predefine the default configuration.



In progress

- Progress state – the phase shown as a **column** in the Kanban board.
- Statuses selection (based on statuses, chapter 5.4.3) – when a task gets this status, it will be shown in this column (if the task is updated from inside, not via Kanban board).
- Change task status to (based on statuses, chapter 5.4.3) – status to which the task is changed when you move it via Kanban board into that column.
- Our recommendation for the beginning is that progress state = task status. As simple as it gets. Each column represents one status. When your processes evolve and you will have more task types and statuses, you then can cumulate some task statuses into one progress state, but that is not necessary at this moment.

The options beneath the status configuration serves as a preset of how the cards (representing the tasks) look like, i.e. which additional data is shown. By hovering mouse over each setting, the respective section on Preview will be highlighted.

We should remind that these settings are defaults. On each project, you can make adjustments you deem necessary.

Detailed technical documentation: <https://www.easypj.com/documentation/article/agile-board-scrum-kanban>.

5.5 Time tracking

5.5.1 Global settings (time tracking)

Go to: ADMINISTRATION > SETTINGS > SPENT TIME

Firstly, we should clarify some semantics. What is **spent time**, **time tracking**, **time entry(-ies)**?

Spent time is a term for the whole concept/functionality of measuring time that was spent by workers on the projects.

Time tracking is understood as the act or process of measuring time. These first two may be occasionally interchanged, so there is no need for concern, when you see one or the other.

Time entry is a single record, with the following attributes, e. g.:

Date: 2nd August; User: Allison; Project: A; Task: 123; Time logged: 2,5 h.

Spent time approvals

Back to the settings. **Approvals** mean that a user with sufficient permissions (**chapter 5.2.8**) may approve/reject time entries of users. If a time entry is approved, its status is approved, and more importantly, no one will be able to edit or delete it, not even an administrator. There are no email notifications involved in the spent time approval. That means if you are going to work with this feature, you should prepare some filters for the approvers where they can see non-approved entries.

Limits

We recommend a reasonable limit for the past (~14 days), so that you, or other admins won't have to do this work instead of the users. Logging time to the future should not be allowed at all (0). The daily limit is more for legislative purposes, but to set it at 24 hours does make sense.

Other

The important settings from the rest are [Allow logging time on closed tasks](#) (which we recommend keeping enabled), and [When logging time, task must be selected](#) which controls whether you may or may not log time directly on the project.

5.5.2 Activities

Go to: ADMINISTRATION > CATEGORIES > ACTIVITIES (SPENT TIME)

Spent time activities are used for another dimension of categorization and reports. Keep in mind that if a user is not completely sure what to select if given some options, they will use the first one. If you create unclear activities, they will not help your reports at all.

You may be thinking "Here we go again with this [keep it simple](#) stuff". And you are right, but in a slightly different sense. There is no harm in creating 4–5 categories, or even more, as long as the user will never hesitate about which to choose and that they will always choose the relevant one. A good example would be [Work](#) and [Meeting](#). Every time the user does not have a meeting, they will log [Work](#). What defines a meeting is quite clear and you will have an overview of how much of the day is spent on meetings.

To force your users to select an activity, you may set none of the activities as default — none will be preselected when logging time. In such case, you should be prepared for many questions (at least from the beginning) about why they can't log time, because some activity must always be selected.

5.5.3 Spent time custom fields

Go to: ADMINISTRATION > CUSTOM FIELDS > SPENT TIME (or NEW CUSTOM FIELD > SPENT TIME)

The three previous chapters on custom fields have explained all the information you need to know about them. We should just repeat — try not to complicate the life of your users by unnecessary required fields. Better yet, try to refrain from any custom field on spent time. There are already enough attributes by which you are able to filter/report spent time — task attributes, project attributes, user attributes, activities.

Detailed technical documentation: <https://www.easypj.com/documentation/article/custom-fields>.

5.5.4 Task timer

Go to: ADMINISTRATION > TASK TIMER SETTINGS

There are more ways of logging time in Easy Project and the [task timer](#) is the most precise of all. It is practically a stopwatch, that does the measuring for you in the background — when you are done with the task, hit the button and time will be prefilled for you to log.

Start timer

- **Status** — when you hit the button that starts the timer, should the task change into some specific status? We say yes, because by starting a timer you are saying that you are actively focusing on that particular task > the task is being worked on > it should not be closed, or passive, the task should be [In progress](#) type of status.
- **Assigned to me** — should the task be assigned to you when you start a timer on it? Not necessarily, you may be helping a colleague, who is the current task assignee, so you may keep this disabled.

Stop timer

- **Assignee** — keep it empty for now, there are too many situations when you don't want this.
- **Status** — if you have mostly small tasks, which you finish in one go, here you can set the status to [Done](#). From our experience, though, the majority of tasks require you to return them to the author several times before actually finishing them, so, keep it empty — no change.
- **%Done** — same applies as above, better to keep empty.
- **Round time** — we recommend not rounding at all. To take full advantage of the precision of task timer.

Detailed technical documentation: <https://www.easypj.com/documentation/article/time-tracking#Logging%20time> (chapter "Start working").

5.6 Dashboards

Go to: ADMINISTRATION > DASHBOARD CUSTOMISATION

In chapters 5.2.6 and 5.3.5 we went to this setting before to manage [My dashboard](#) and [Project dashboard](#) templates.

Now, we will look at dashboards usable for all sorts of cross-company overviews — [custom dashboards](#). You have the option to build them from scratch by clicking the [New Dashboard](#) button.

Page properties

- **Title** — name of the page.
- **Identifier** — will be used as the URL (link) to the page. In the example on the screenshot the URL would be https://is.easysoftware.com/easy_pages/hr-reports. This is the form of link for every custom dashboard. These dashboards can be accessed by the [Select dashboard](#) feature in the top left corner.
- **Layout** — Once you create this page, it is not possible to change the layout.
- **Page scope** — leave it at [Nothing](#). The other option may be used in a custom implementation, but for now, it is not relevant. Once you create this page, it is not possible to change the page scope.

It is natural that at the moment of the initial application set up you can't have a clear concept of what kind of dashboards and report types you are going to use. This setting may start after a few weeks of production use. Don't spend too much time building dashboards with theoretical reports before you have enough data in the system.

The screenshot shows the 'New dashboard' configuration form. The form is titled 'New dashboard' and has a search bar at the top right. The form fields are:

- Title:** HR reports
- Identifier:** hr-reports
- Description:** (empty text area)
- Tags:** (empty dropdown menu)
- Layout:** Three options are shown:
 - Header, Footer, Sidebar, two columns (radio button)
 - Header, two columns (radio button, selected)
 - Dashboard (radio button)
- Dashboard scope:** Three options are shown:
 - Nothing (radio button, selected) — Means that the dashboard doesn't depend on project or user. All users have same content.
 - User (radio button) — Means that the dashboard doesn't depend on project. Same like user's dashboard.
 - Project (radio button)
- Permissions:** Two checkboxes are shown:
 - Allow ONLY following users to VIEW this dashboard (checkbox)
 - Allow ONLY following users to EDIT CONTENT of this dashboard (checkbox)

A 'Save' button is located at the bottom right of the form.

6

Project lifecycle

- 6.1 What makes a project in Easy Project
- 6.2 Project settings
- 6.3 Project overview
- 6.4 Project lifecycle
- 6.5 Project modules
- 6.6 Project templates
- 6.7 Project portfolio

Now that the application is set up and configured, we can take a look at some effects of the settings, and most importantly to the actual project work.

In the coming chapters, we will take a top-down journey from the highest level — projects, through tasks and right down to specific time entries.

By understanding their characteristics and relations, you will always be in control.

6.1 What makes a project in Easy Project

6.1.1 Easy Project and project management terminology

We need to commence this section by admitting a few conscious discrepancies in our definition of a project, other terms in Easy Project, and the theory of project management.

The most illustrative example is the possibility to leave the start and/or due date of a project in Easy Project empty. In the PM theory, a project must always have a start and end date. We just kindly ask you to forgive this kind of discord.

You may find more similar cases like this. They are caused by the vast configurability of the application. There always remains a configuration that does comply to the official terminology **based on PMI and IPMA standards**.

6.1.2 Project attributes

The only default required attribute of the project is the **Name**. The rest is arbitrary.

The screenshot shows the 'Settings - Edit project' interface for a project named 'Company Processes and Work Management'. The interface includes a navigation bar with 'Dashboard', 'WBS', 'Gantt', 'Spent time', and 'Tasks'. The main content area is divided into several sections:

- Name***: A text input field containing 'Company Processes and Work Management' with a note '255 characters maximum'.
- Subproject of**: A dropdown menu.
- Description**: A rich text editor with a toolbar containing bold (B), italic (I), underline (U), strikethrough (ABC), and text color (A) options.
- Project custom fields**: A section with checkboxes for 'Product', 'Country', and 'Department', and links for 'Check all' and 'Uncheck all'.
- Trackers**: A section with checkboxes for 'Bug', 'Deliverable', 'Task' (which is checked), and 'User Story', and links for 'Check all' and 'Uncheck all'.
- Custom fields**: A section with a dropdown arrow.

On the right side, there is a vertical menu with options: 'Archive', 'Close', 'Copy', 'Delete', 'New subproject', and 'Create template project'. A blue 'Save' button is located at the bottom center of the form.

Subproject of (Parent project)

By selecting a parent project, you are able to build the project structures, portfolios, or programs. Depending on the depth of the structure, you may consider the top-level projects as "containers" or "folders", which themselves do not contain any data directly, but simply gather data from their subprojects.

Also, they often have the function of providing general information about the whole section they cover.

Please be aware that changing the parent project in fact means moving the project and all its data, including subprojects. Moving a big project structure may be a very long and exhausting operation (for the server resources) and also the attempt could result in a timeout error.

If you need to change the parent project, we recommend first list all tasks belonging to the current project. If the number is approaching 10.000, you should consider doing this operation via a database or rails console (server solution) or asking our support (cloud solution).

Description

It is the big text field, where you should provide the most relevant information for all stakeholders of the project — the goal, information sources, crucial specifications, expectations of the customer and similar.

The optimal length is about two—three brief paragraphs. It is not meant for detailed technical documentation — you can always use the module **Documents** for that, while just adding links to those documents in the project description.

Other attributes

- **Start/due date** — manually entering these dates is available based on a setting. If you don't see these fields, their value will be automatically set based on the earliest start and the latest due date of tasks on the project. For more information see chapter 5.3.1.
- **Public** — project will be visible to all users, even if they are not specifically added as members. Remember the special roles **Non-member** and **Anonymous** back in chapter 5.2.8? No? We don't blame you; this guide is getting lengthy. But you may want to check it again if you are planning to share some information more openly. Public projects are a good option for it.

- **Planned** — could also be called "silent". This option allows you to assign and schedule tasks without bothering the users by email notifications. You can make any adjustments based on other running projects, and finally when it is time to launch this project, just untick this option.
- **Inherit members** — this option is only visible if you selected a parent project. Its function is that it copies project memberships from the parent project. If enabled, you will not be able to remove project members who are inherited from the parent project. However, you will still be able to add new members or new roles to existing members.
- **Comments on tasks are private by default** — useful when there are external co-operators or customers in the project. Private comments are only seen if permission is given ([chapter 5.2.8](#)), which should only be allowed for internal roles.

Project custom fields vs. custom fields

On the right side of the project creation/editing form, there are two sections that might look confusing. Let us clarify this difference straight away.

Project custom fields are attributes of the project directly (more in [chapter 5.3.4](#)). So, in this setting, you decide whether to enable/disable these fields.

The **custom fields** section at the very bottom is to enable/disable the fields on the tasks that belong to this project (more in [chapter 5.4.6](#)).

If the boxes are greyed out, it means the fields are set **for all projects**, therefore you can't disable them.

Modules

Here you decide which features you want to use in the project. When creating a project from scratch, the modules are prefilled based on a global setting (explained in [chapter 5.3.1](#)).

You should only enable modules that will really be used. Otherwise, you will have a wide project menu full of useless buttons that will only distract users' attention. These particular modules will be described in detail in [chapter 6.5](#).

Task types

As you know, task types define types of work. Enable only those relevant to each kind of project. It will be easier to submit and manage tasks within the project.

6.2 Project settings

After project creation, you will end up on the settings page of the project, where you will find some additional options.

If you have been reading from the beginning, at this point you are probably getting fed up with all of the settings — you haven't started any project work, and you just keep setting up something. Let us just step back to remind you that you will not have to worry about any of these settings once they are in place — that is what project templates (more in [chapter 6.6](#)) are going to help you with invaluabley.

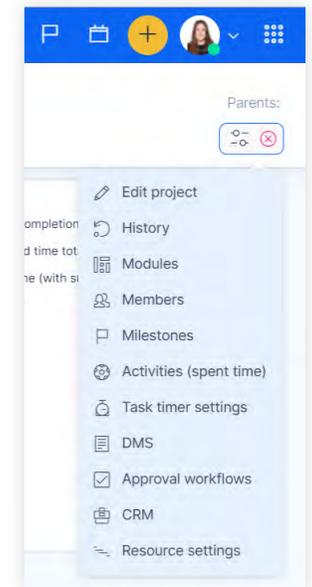
We are now explaining all the important options within the projects, so that you are prepared for any eventuality in the future.

Edit project

Here are the options you chose when you were creating the project. Project information from this section (including project custom fields) may be shown on the project dashboard for all users to read. More on that in [chapter 6.3](#).

History

In this section, you will find a journal of changes in the project attributes as well as comments written to the project about some important announcements or changes. These comments may also be shown on the project dashboard.



Modules

Excluding the regular enable/disable modules, here you can also set the [default project page](#), which means when you access the project, you will land on that page first. Furthermore, by clicking [Has custom menu?](#) you are able to rearrange the ordering of the items in the project menu for the utmost convenience.

Members

Adding/removing/editing memberships is intuitive, but there are a few principles you need to remember.

- **Inherited memberships** can't be changed — as explained in the previous chapter. You will see those boxes greyed out.
- **Group memberships**
 - By adding a group as a member, all users in the group will be added to the project.
 - It is not possible to remove a user from the project if they are in a group in this project.
 - It is possible to add other roles for users in a group.
 - If a user is added to a group, they are added as a member to all projects where the group is.
 - Users removed from a group will be removed from all projects where the group is set as a member.
 - If this user was given another role in the project individually, they will still remain in the project in this role, even if the group was removed.
- You will only be able to manage memberships on roles based on the permissions of your role ([chapter 5.2.8](#)).

Milestones

Milestones are important points in time in the project schedule. Here you will see a simple list of milestones and options to create, edit or delete milestones.

The best way to create and edit milestones is via Gantt, where they are neatly visualized along with tasks belonging to them.

We have a few recommendations and general information about the use of milestones.

- Do not use **shared** milestones [for all projects](#) if using project templates — if there is just one milestone shared for all projects, it may cause seemingly random shifts in task and project dates when creating new projects from templates.
- **Open** — tasks can be added to this milestone.
- **Locked** — milestone is still open, but you can't add any new tasks to it.
- **Closed** — all tasks are finished and a milestone is therefore finished and can be hidden from view.

From the main project menu, milestones are listed under the item [Roadmap](#) symbolizing the road ahead marked by the milestones.

Activities (spent time)

There is an important decision to be made right in the first setting.

- **Activity is selected when creating a task** means that the author of the tasks is the one who decides which activity for spent time will be used in this task > users who log time on the task simply enter the hours, not selecting the activity.

This setting makes it easier for users to log time but complicates it for users creating tasks (one more required attribute to select). Also, if you first used the other option and later switched to this one, it will also complicate the update of tasks that were created without a selected [activity](#) — the user updating it will have to choose the activity on the next update.

This option is useful if new tasks are created only by one person who controls all the project operations.

- **Activity is selected when logging time.** Definitely choose this option if there are more users allowed to create tasks in this project.

Additionally, it is possible to enable/disable activities for logging time in this project. Once again, to make the process a bit easier for the users.

Finally, based on a global setting ([chapter 5.3.1 — Assign activities to roles](#)), you would see a matrix of roles and activities to configure, which roles can log time for which activities. While it may be a hassle for the setting, you may find from your practice that it would help immensely with the time reports.

Task timer settings

These are identical settings to the global setting of the task timer ([chapter 5.5.4](#)). The difference is here you have the option to override the global settings, if you decide the behavior should be a bit different in this project than the rest of the system.

6.3 Project dashboard

Here is an example of a project dashboard. It follows the principles explained in the previous chapters. Consider it a starter recommendation, which you will later be tweaking according to your practice.

The screenshot shows a project dashboard for 'Residential Property Construction'. The dashboard is divided into several sections:

- Project description:** 'This is a small house construction project.'
- Project history:** A rich text editor with a 'Type here...' placeholder and an 'Add comment' button.
- Comments:** A comment from 'Easy Admin' dated '09 Oct 2023 05:35 PM' stating 'Environmental evaluation has been submitted.'
- Overdue (2):** A table listing overdue tasks:

Subject	Assignee	Status	Due date
Planing and Admin	[User Icon]	New	04 Oct 2023
Permits	[User Icon]	New	04 Oct 2023
- Project team:** A list of team members including Easy Admin (Project Management Role), Julia (Product Owner), Paul (Project Manager), Peter (Project Manager), Callie (Client), Constantine (Consultant), Danny (Developer), and Lucy (Direct Sales Rep).
- Quick planning:** A sidebar with a 'Project card' showing 5% completion, 830h estimated time, and 45h overall spent time. It also includes options for 'Overall activity', 'New subproject', 'New subproject from template', 'Close', and 'Add to Help desk'.

Let us describe the widgets from the sample dashboard. The page setup will then become clear for you to use all the other available possibilities.

Project description

When editing the project dashboard, in the widget selection under group [Projects](#) choose [Project description](#).

The description is the text you enter in [SETTINGS > EDIT PROJECT](#). That means you can not edit the description directly on the project dashboard — it is only allowed to certain roles that may edit the project.

Project team/project history

The [Project team](#) widget can be found under the group [Widgets for sidebar](#), this name indicates that the widget is also optimized for the right sidebar section of the project dashboard, if you wish to put it there. The larger section on the right, as in our example, is a bit more prominent and better if you have various project teams and it is important to present who the co-workers are on that project.

If you are a smaller company and the team is practically identical on all projects, you may replace this widget with [Project history](#) which is under group [Projects](#). It shows the comments/updates made on the project directly. It also allows to add new comment (for users with proper permissions).

Project card

The widget we feature on the right-side [Project card](#) belongs under group [Widgets for sidebar](#). It shows the most important information about the progress of the project, including completion based on spent vs. estimated hours and completion calculated from completion of each task weighted by its estimated time. The indicator shows if there is any trouble:

- **Red** — project is after due date
- **Orange** — at least one task is after due date

Finally, beneath the information, you will find some functional buttons.

List (Tasks)

In our example, we included a widget showing the highest priority tasks. This widget is called [List](#), and you need to select entity [Tasks](#). It may be very handy if you use it with restraint. Use it when there is some free space on the dashboard to highlight some crucial tasks (for example high priority or overdue).

Please, do not overload the page by various task lists. Just trust us that by putting four different widgets with extensive task lists, you will completely miss any relevant attention from the project members. After all, for the best task management and schedule monitoring you always have [Gantt](#).

6.4 Project lifecycle (details)

It took a while to get here, but we have finally completed the settings part of the manual. Now it's time to work with the projects, tasks, time reports, etc.

Starting from the project perspective here is how a model project lifecycle looks like:

- Planning
- Realization
- Closure
- Archiving
- (Deletion)*

* We strongly recommend never to delete any project that has some production data. By archiving you achieve practically the same result, but with the possibility to restore the data very easily.

These are project phases based on predefined "statuses" hardcoded in the application.

Planning

This has already been mentioned in chapter 6.1.2 (Other attributes). During this phase, the manager is preparing tasks and schedules, but team members are not working on them yet.

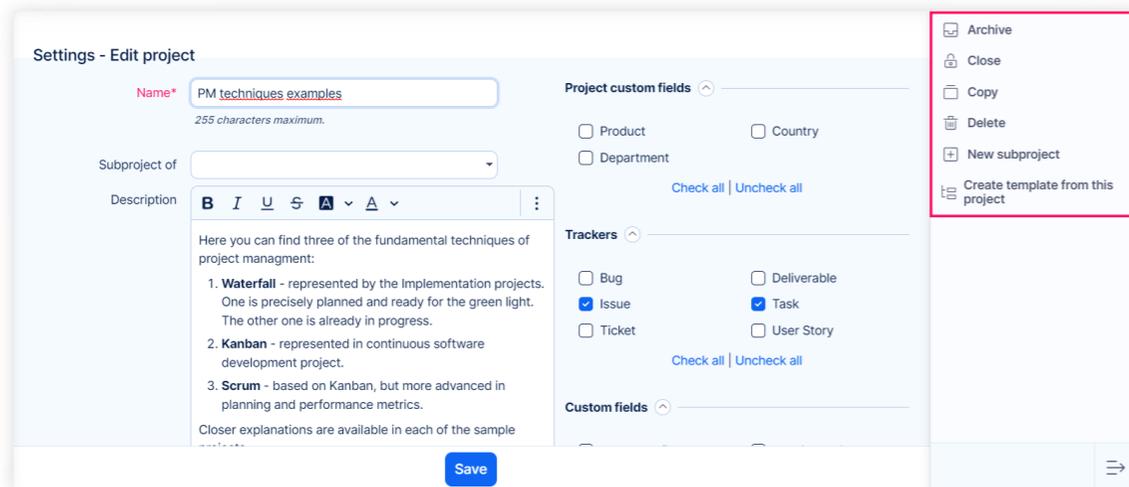
Realization

This is the biggest/main phase — users work on tasks, log time, upload files; manager manages, etc. From the project perspective, there is technically not much happening, possibly changes in the due date, which you already know how to do. The focus is on the smaller elements, which are tasks and milestones.

To get into this phase, simply uncheck the **Planned** option in project settings.

Closure

All the further operations are performed from **SETTINGS > EDIT PROJECT**.



By closing a project, you will put it into a **read-only** state. The project is still visible, searchable as well as all data within the project. But it is not possible to change any data whatsoever.

It is recommended to keep your finished projects in that state for at least a few months after finishing, because some information from it may still be useful.

Closing and reopening the project is allowed via specific permission.

Archiving

An archived project is (almost) completely hidden from the eyes of all users, including admins. They cannot be searched; they are not in lists or any selections. The only exception of data visible from archived projects are time entries. Spent time reports need to be complete, and are therefore readable also from archived projects.

If you try to access an archived project or any of its tasks, directly via the link (e. g. is.easysoftware.com/projects/123), you will get a 403 error (insufficient permissions), regardless of your permissions or being an administrator.

The only way to find such a project is via **ADMINISTRATION > PROJECTS** and filtering by **Archived** attribute. From there, it is possible to unarchive (by menu from right-click) a project and see its data.

Archiving a project is allowed via specific permission; unarchiving can be done only by an administrator.

Deletion

Deleting a project may get very costly, which is why we recommend not to allow any role to delete a project. Leave this option only to administrators, who have it natively.

6.5 Project modules

Here is a brief introduction of the project modules — what do the items in the project menu consist of.

6.5.1 Gantt

In our eyes, and confirmed by thousands of users, the most powerful feature in Easy Project project management is the Gantt. It allows you to create and edit tasks and milestones, smoothly schedule the project, manage relations between tasks, save baselines, view critical path and export the whole chart. This is where most of the managerial work can be handled. A detailed manual for Gantt is available in our online knowledge base: <https://www.easyproject.com/documentation/article/gantt-chart>.

6.5.2 Tasks

The task list's purposes are mainly ad-hoc reports or searching. Filtering and reporting in Easy Project is quite extensive and flexible by supporting [list](#), pivot table, or [chart](#) outputs.

Any such task reports can be re-used for one-click access via the [saved filters](#) function. Just one recommendation here, save only the filters you are sure to use regularly. Too many saved filters and users will get lost, start ignoring them and they will lose time by always filtering ad-hoc.

One reminder, you may also see tasks from subprojects in this list. This behavior is based on the global setting ([Display subprojects tasks on parent projects by default](#) — chapter 5.4.1).

Regardless of that setting, you can still manually choose to view tasks from subprojects or not — by using filter [Subprojects](#) — [none](#) or [any](#).

6.5.3 Spent time

Same as above, the spent time module is the place for all sorts of time reports. Possibility of saving filters naturally can't be missing here. The setting [Display subprojects tasks on parent projects by default](#) also applies to spent time.

6.5.4 Documents

There are two functional sections here. Starting with the easier (blue frame) — at the very bottom you will find the list of all files attached to the tasks of the project. It makes it easy to find a specific file you are looking for. Another function of documents (red frame) is sorting and categorizing project files into folders.

We need to make a clear distinction about a couple of technical terms.

- **Document** — it is not a file itself, but rather serves as a folder in which the files are stored. In the screenshot above, the document is [Project goals](#). Documents are sorted into categories (configurable in ADMINISTRATION > CATEGORIES > DOCUMENT CATEGORIES), represented in our example by Product documentation.
- **File** — this is the actual file you upload into the document. In the screenshot it is the [.log](#) file. Uploading a file into the document is done via the "+" button under ellipsis (three dots).

This way of sorting helps to keep order in your uploads.

6.5.5 Roadmap

If you have created a milestone in the project (for example via Gantt), or there are milestones shared from other projects, the item Roadmap will appear in the project menu. It is a different view of tasks sorted by milestones with elementary analytical data.

6.5.6 Kanban

As mentioned in chapter 5.4.10, there are two modes of kanban on project – Custom kanban; Project kanban with backlog.

With custom kanban, this project module is practically a dashboard. You can add widgets Custom kanban and Noticeboard. Every custom kanban widget has own settings (task filters, progress states, card settings).

The mode Project kanban with backlog means that the project has one kanban board in one configuration. Tasks will not get to this kanban automatically (just by meeting some filters). The tasks must be manually added to the backlog of this kanban.

Detailed technical documentation: <https://www.easypoint.com/documentation/article/agile-board-scrum-kanban>

6.6 Project templates

Project templates are one of the most important time-savers in the application. While every project is unique (simply by definition), there is no reason why you can't re-use an existing functioning structure, or skeleton.

The uniqueness lies in the content of the project, such as duration, goal, difficulty, final product, scope, etc. The form may be shared among projects of the same type, for example, house construction, market research, product development, etc.

The project template may be ready with preset tasks and milestones in a general form and prescheduled, with the whole project team. Upon creating a real project from this template, you will enter all specifics and reschedule.

6.6.1 How to create a template

This is very simple, go to an existing project — SETTINGS > EDIT PROJECT > CREATE TEMPLATE FROM THIS PROJECT. If the project contains subprojects, they will also become a part of the template.

Project templates appear in a separate list available in ADMINISTRATION > PROJECT TEMPLATES. Non-admins will find them in the global menu.

You will notice that you are currently in a template by a sign next to the project name.

Who can modify project templates, you ask? Firstly, to be able to access a project template, you have to have the permission to **create projects from template**, which allows you to see the list of templates. Secondly, you need to be a member of that template in a role that allows to **edit project**.

6.6.2 How to create project from template

Go to: SETTINGS > EDIT PROJECT, where you will find the button to [create project from this template](#).

If the template contains subprojects (sub-templates) these will also be created under the new project. However, if you are creating a project just from the sub-template, it will not contain the parent project from a template.

During project creation you can choose to move dates of tasks and milestones, because, naturally, the template has a schedule in the past (when it was created).

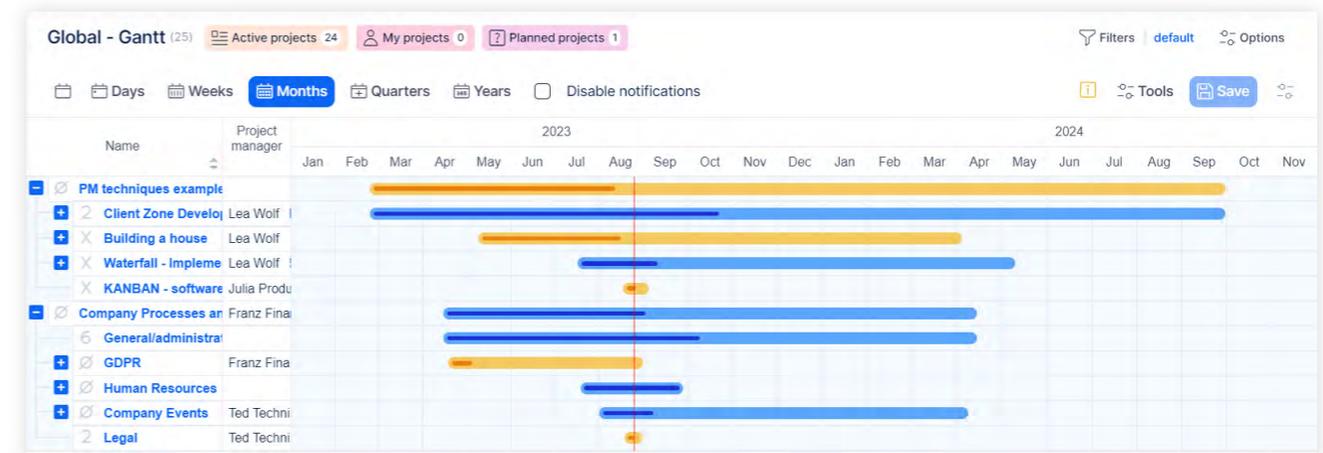
We feel the need to remind you of an important situation, that was also mentioned in chapter 6.2 (Milestones). If you are going to use the function of moving dates when creating projects from a template, first make sure that there are no milestones shared for all projects in your whole application. This would cause a seemingly unexplainable shift in the task dates.

6.7 Project portfolio

6.7.1 Global Gantt

Similar to task management, but on a bigger scale, the most powerful tool for portfolio management is the Gantt chart. While on a view of a single project, the Gantt offers task-related features, on this — Global Gantt — you will find portfolio management tools.

Global Gantt is accessible via GLOBAL MENU > GLOBAL GANTT. Global Gantt allows to visualize completion progress relative to expected progress (today); move whole projects in time; quick filter delayed projects; in each project it shows the name of the task that is mostly delaying the project; breaks down the view to milestones and tasks; view resource allocations from Easy Project Business Plan; and, of course, export the chart.



We are often asked about missing features in global Gantt, which are working on project Gantt (such as creating new tasks or show task fields in the list). Yes, it is possible to view the tasks even in the global Gantt, but there are technical limitations for task operations and listing because this view is above **projects**, not tasks. Also, it is not the best practice for portfolio managers to micromanage specific tasks in the overview of the portfolio.

Detailed manual for Gantt is available in our online knowledge base:
<https://www.easypoint.com/documentation/article/easy-gantt-pro>.

6.7.2 Project list (tree)

The standard project list can be used for reports, summaries or to locate a certain project somewhere deeper in the structure.

The project list can be found via the left menu item **Projects** if a user type has it enabled (**chapter 5.1.6**). We should clarify some details that differentiate the project list from other lists and are commonly misunderstood.

- When you choose to order by some attribute (for example by name), the projects will be viewed all in one level.

Name	Project manager	Indicator	Status	Priority	Start date	Due date
.CRM	Ricky Sales Director	○	active		---	---
.Help desk	Sam Servicedesk Director	○	active	Regular	---	---
2023 Data Process audit		○	active	Regular	---	---
2024 Data Process audit	Easy Admin	○	active	Regular	---	---
Africa		○	active	Regular	---	---
Americas	Ricky Sales Director	○	active	Regular	---	---
Anonymization Requests		○	active	Regular	---	---

- Unless you set a specific sort order, the projects will be sorted in a tree. Meaning that you will first see top projects, which you can then expand to view their subprojects.

Name	Project manager	Indicator	Status	Priority	Start date	Due date
.CRM	Ricky Sales Director	○	active			
+ CRM data	Ricky Sales Director	○	active	Regular		
+ RFP	Ricky Sales Director	○	active	Regular		
.Help desk	Sam Servicedesk Director	○	active	Regular	31 Aug 2021	14 Aug 2025

- When using filters in the tree view, you may see results that do not fit the filter. The reason is, that to show the relevant projects, you also need to show their parent projects.
- Sorting and filtering projects by start/due date is possible only if you disable projects dates' calculation – thus entering start/due date manually (**chapter 5.3.1**).
- It is not possible to show tree view fully expanded by default or to expand all projects by a single button — with a large number of projects, such an option is simply not feasible due to immense hardware demand of such operation.

Project list for administrators

There is another project list in Easy Project, located in ADMINISTRATION > PROJECTS. It is almost identical to the regular list with 2 main differences: 1) It is available only for admins; 2) There is a filter **Status** where you can select **archived** to find archived projects and possibly unarchive them (**chapter 6.4**).

7

Task and time tracking

- 7.1 How to create a task
- 7.2 Task detail
- 7.3 Operations with task
- 7.4 Time tracking

7.1 How to create a task

In the previous chapter, we have gone from project level upwards to the portfolio. Now, it's time to move a step deeper – to the **task** level.

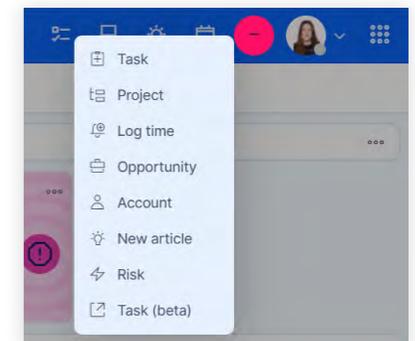
Tasks are the most used entity in the whole of Easy Project. Work should primarily be passed via tasks. Which may lead you to think: "If the tasks are so important, why are they at the end of this guide?"

It was necessary to at least read about the configurations (for example Workflow), so now you can understand the following operations in full context.

There are lots of ways to create a task in Easy Project, to make it as convenient as possible for all your users' preferences.

Plus button

The button is always available, no matter where in the application you currently are.



WBS

WBS (Work Breakdown Structure) is the best tool for creating tasks structure.

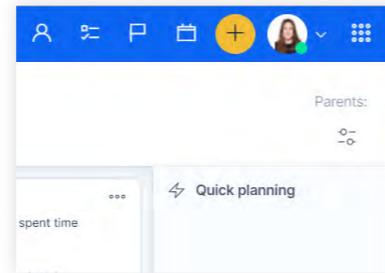
Gantt

Gantt on a project level allows to create tasks by dragging in the chart.

Quick project planner

If you enabled the module [Quick project planning](#) on a project, go to the project dashboard where you will see a button on the right side.

Selection of fields visible in quick planning is configurable in project [SETTINGS > QUICK PLANNING](#). The tasks are created by hitting the [Enter](#) key.



Keyboard shortcut

[Alt + Shift + N](#) takes you to the new task form.

To-do list

If you are located within a project, you can drag an item from your to-do list into the highlighted area.

7.2 Task detail

The [task detail](#) is comprised of various sections.

The header and attributes

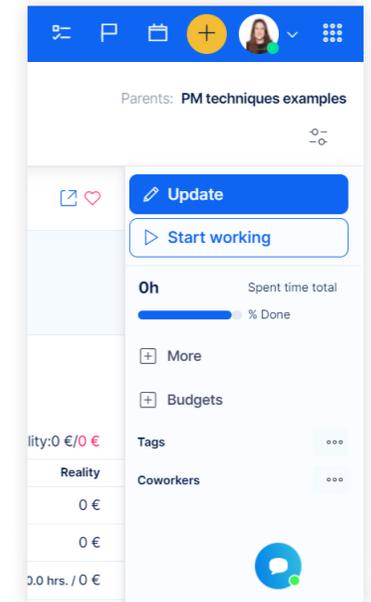
Naturally, the most prominent position is taken by [Subject](#) (task name), with an avatar representing the current Assignee. Below which you will find attributes such as status, assignee's name, priority and due date — these are the most important attributes that are always shown. Underneath the [+More](#) toggle additional attributes are hidden (such as task type, estimated time or all custom fields).

The application remembers the last state of the header (expanded or collapsed), so every other task you visit will be shown like the last task you viewed.

Sidebar

The right sidebar contains important progress and evaluation info, [Update](#) button and task operation buttons. As well as a list of co-workers — users who may not be assigned to the task but receive notifications from updates and for whatever reason are involved.

At the very bottom of the sidebar, export buttons are located.



Attachments and related entities

Beneath task attributes, you may witness various sections showing items related to the task (attachments, related tasks, parent/sub-tasks, accounts, etc.). All of these sections may be collapsed not to take too much space.

History, comments, spent time

Last but not least, the full task history unfolds. It is split into sections.

- **Comments**
- **Spent time** — the table here is hardcoded (to view configurable time report of the task, click on the [Spent time total](#) in the sidebar).
- **History** — all updates/changes on the task.

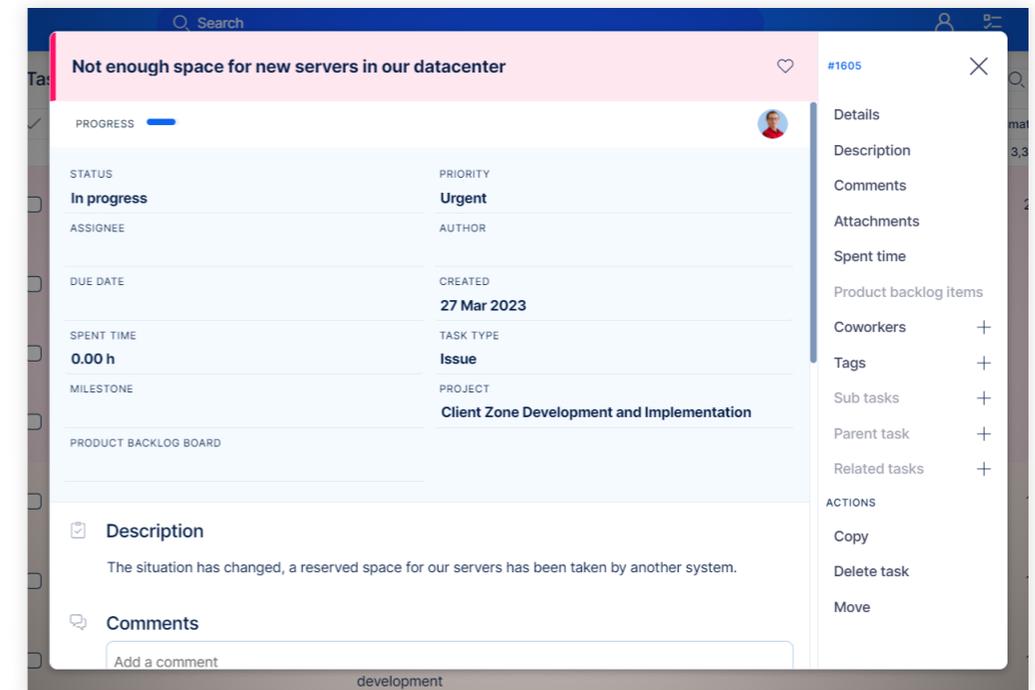
If the task has too many changes/comments, you will only find the last 10 updates on the first load of the task. To load all changes, just scroll down and hit [Show all](#). This restriction is for the sake of quicker task loading.

7.3 Operations with task

All these operations are from the application perspective quite intuitive, so there is no reason to explain how they work. But it does make sense to explain, which peripheral factors determine the behavior (such as permissions, global settings, workflow).

Quick task editor

There is a more compact, interactive, mobile-friendly view of a task detail, which also allows performing (almost) all operations with the task.



Its main advantage is that it works without necessity to refresh the page or jump to a different tab on your browser. It can be accessed by following ways:

- In **task list** hover mouse over a task and on the right side you will find a special button.

Not enough space for new servers in our datacenter	Client Zone Development and Implementation		In progress	---	0.00 h	0.00 h
Can't delete file	Client helpdesk project		In progress	⚠️ 22 Aug 2023	0.00 h	
Key programmer just left	Waterfall - Implementation of IS		In progress	28 Apr 2024	0.00 h	0.00 h
Remove an obsolete function	KANBAN - software		Assigned		15.00 h	0.00 h

- On **task detail** – button on top right of the task header

Software development (Kanban)

Dashboard Spent time **Tasks** Kanban Test Cases

#774 - Save button not functional

Status: In progress Priority: Urgent

Assignee: Danny Developer Offline Spent time: 0.00 h

Author: Ted Technical Director Offline Created: 14 Apr 2019 12:00 AM

Estimated time: 20.00 h Product backlog board: ---

- In **WBS** via Edit button
- In **Kanban board** — click on the task card
- In **Calendar** – it is the default task view

Update

Task update is the most used operation that includes changing attributes, adding comments, but also logging time.

The amount of attributes and options you see is determined by workflow (some may be read-only), special visibility of custom fields, permissions (e. g. disallowed to add a comment), disabled modules on a project (e. g. time tracking). These are the places you should investigate if your users have problems with task editing.

Attempting to save unpermitted attributes (e. g. due date after project due date, unfilled required field, or similar) will result in an error that will be descriptive to tell you where to look for the solution, or simply to tell the user what they did wrong.

Updating task attributes can also be done from the task header (without clicking the **Update** button), by using the pencil button. Not all attributes are editable this way and some updates may result in an error. For example, if you attempt to change the status, but workflow dictates that in that new status, you need to fill in some other field. Again, these kinds of errors will be descriptive.

Logging time

Apart from logging time via task update, you can do so via a special button under the task operations in the sidebar (**MORE > LOG TIME**). It is a quicker way in a pop-up window.

Task timer

The related settings to this feature are explained in Chapter 5.5.4.

Hit the **Start working** button in the sidebar to start the timer. Pause when you need to divert yourself to a different task and leave this one be for a short while. **Finished** when you are done, which will take you to task update and confirmation of the measured time.

Start working button is also available in the context menu — task list, right-click.

Add subtask

By clicking here, you will be redirected to the new task form (as when you are creating a regular task). The field **Parent** task is prefilled.

A common issue with this feature is that when you use a task type where the field **Parent** task is disabled ([chapter 5.4.2](#)), it will not create a subtask. Which then looks like the button is not working.

Add subtask is managed by permission [Create tasks](#).

Copy

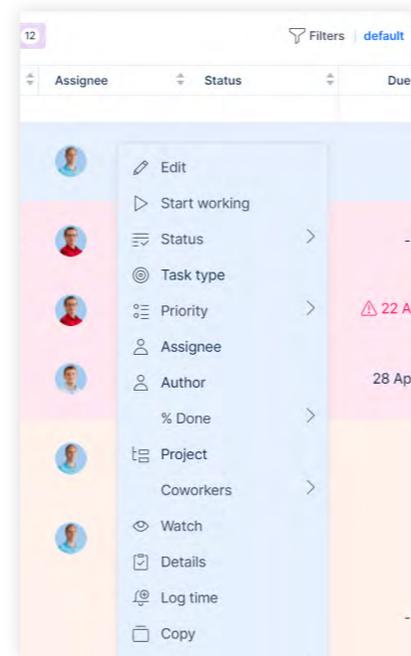
This operation takes you to the new-task form, where attributes are prefilled from the original task. You can change them as you please. There are also options to keep a relation (link) between the original and the copy; to copy attachments from the original.

Copying is managed by permission [Copy tasks](#).

Delete

Just a reminder from more of the previous chapters — do not allow users to delete any entity. It will destroy the entry in the database, and you would need to search through your data backup to find any information about that task.

Delete is managed by permission [Delete tasks](#).



↑
[Context menu](#) on task list (right click).

Move

Almost identical to the regular task update, but with added field Project, where you may select a new project for this task = move it.

The move is managed by permission [Move tasks](#).

Clone as subtask

A combination of [Copy](#) and [Add subtask](#), i.e. copy attributes from original + prefill the field **Parent task**.

Merge

If it is common in your organization to have duplicate tasks for the same subject, you may want to use the merge function. You would choose another task into which you want to merge this task.

As a result, the current task will be closed (into the first closed status, according to the status order ([chapter 5.4.3](#))). All comments from the current task will be included in the history of the chosen task. Description of the current task will be added under the description of the chosen task (with a note that this part is taken from a merged task). Attributes are kept from the chosen task.

Task merging is also possible in a task list. Select more tasks **from the same project**, right-click, choose [Merge to](#). This is especially useful for merging more than two tasks.

Task merging is managed by the permission [Edit tasks](#). There is no separate permission for that operation because it is nothing more than just specific changes in the concerning tasks.

Add related tasks

With this button, you can link tasks to each other.

This functionality is managed by the permission [Manage task's relations](#).

Co-workers

A coworker is a user who has some kind of interest in the task. The user would receive notifications from the task. In case of a strict task visibility policy, this is the way to show the user a task, that is not assigned to them.

By clicking the eyeball button, you will add yourself as a coworker. By choosing "+" you will select other users or whole groups. Behavior of groups in co-workers follows the same logic as in the project memberships ([chapter 6.2](#)).

Bulk edit of tasks

A variety of operations can be done in bulk on a task list. Go to the task list, select multiple tasks and right-click.

The available operations are based on your permissions, workflow and whether they all belong into the same project. By clicking edit, you will go to the task update form (where you can change multiple attributes at once).

However, because there are more tasks being changed at once, there is a greater chance that you will attempt a forbidden operation. In such case, all tasks that contain only allowed changes will be saved, while tasks with at least one problem will be listed and every error will be explained.

7.4 Time tracking

In the decision whether this chapter should have been on the top level, or not, the winning argument was that time tracking is, in fact, one level lower than tasks, i.e. PROJECTS > TASKS > TIME ENTRIES. Therefore, time tracking is a sub-chapter covered under Task tracking.

7.4.1 How to log time

Here is a summary of the options to log time. We need to remind you that in order to be able to log time to a certain task/project, the module [Spent time](#) must be enabled on the project ([chapter 6.5](#)).

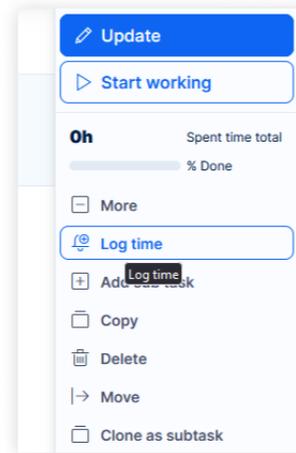
Task update / quick task editor

When updating a task, there is a section dedicated to time logging. Please be aware that this section does not update any task attributes – it is not a task update per se. Also, a comment added to a time entry is not shown in the task comments, it is just a note for the specific time entry.

The screenshot shows a task update form for task #774, titled "Save button not functional". The form includes a search bar at the top, a progress bar showing 60% completion, and a section for "Edit additional attributes". Under this section, there are fields for "Spent time" (with a dropdown arrow), "Hours*" (with a text input field containing "Hours" and a help icon), and "Comment" (with a text input field). Below these are radio buttons for "Activity*", with "Work" selected. At the bottom, there is a "Settings" section with a checkbox for "Billable?".

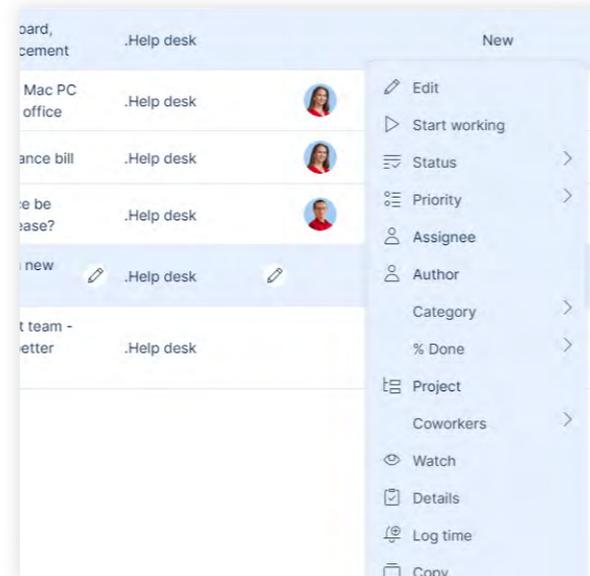
Button on task detail

As mentioned in the previous chapter, when you are on the task detail, you will find the [Log time](#) button under [More menu](#).



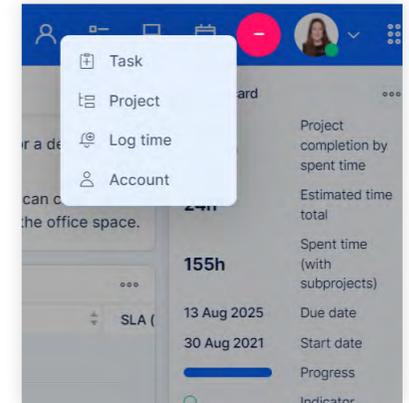
Context menu on task list

On any task list, right click, [Log time](#).



Plus button

If not available in the submenu, it is because the user has disabled permission to log time and/or the currently shown project has the module [Spent time](#) disabled ([chapter 6.5](#)). Otherwise the item is always visible.

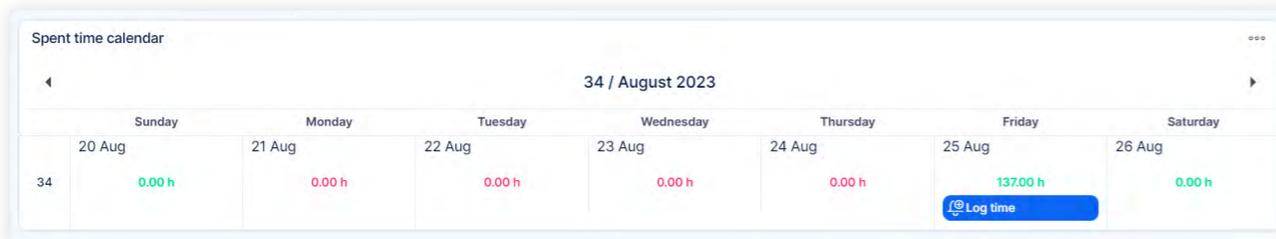


Task timer

This method was explained in the previous chapter, as well as [chapter 5.5.4](#). It is the most precise way to measure time.

My dashboard — spent time calendar

When setting up a dashboard of your users ([chapter 5.2.6](#)), you may choose the widget [Spent time calendar](#) to put in a prominent sector. It will show the user how much time they logged while indicating whether they have reached the number of prescribed hours (green or red) from the working calendar ([chapter 5.2.7](#)). It also allows logging time.



Timesheets

Go to: GLOBAL MENU > TIMESHEETS

Timesheets are a specific form of logging time in bulk, but they still use the exact same standard logic of logging time as the rest of the application. Every time entry requires project, task, activity and date. Logging and editing time entries in a timesheet requires necessary permissions and follows limits from global settings ([chapter 5.5.1](#)).

Detailed technical documentation: <https://www.easyproject.com/documentation/article/timesheets>.

7.4.2 Possible issues

Time tracking was explained in detail in chapter 5.5, but we will give you a brief summary to refresh your memory.

Activities

You cannot log time without activity, it is a required attribute of a time entry. If your users don't see any activity, you should check the settings of the project where they are attempting to log the time (PROJECT > SETTINGS > ACTIVITIES (spent time)). Either there is no activity enabled, or the activity should be prescribed on the task, but it isn't.

7.4.3 Time reports

Obviously, the main purpose of time tracking is to generate all sorts of reports for internal or external use. Where will you find such reports?

Time reports dashboard

Go to: GLOBAL MENU > TASK REPORTS

The dashboard is preset in a default state, which you will most likely have to adjust based on your needs. Nevertheless, this page shows you some reporting capabilities and various forms/outputs.

Here are at least explanations of their purpose and recommended use, while more details about the configuration are in the knowledge base articles listed at the end of this chapter.

- **Trends** – a trend shows a resulting value based on any data set in the application, with the possibility to compare it with the value from the previous time period.
- **Gauge** – is used to show fulfilment of a certain target. The target may be fixed (set manually), or dynamic (based on a resulting value from a defined data set).

- **Charts** – the three most standard chart types (bar, line, pie) are a necessity. Both X and Y axes are, of course, configurable to show exactly what you need.
- **Pivot table** – a multidimensional report like you may know from spreadsheet editors.
- **Lists** – in spent time, the list is not used so much, but in case you need to dig deep, you are able to filter out particular time entries in a list.
- **Global filters** – (at the top of the page) these are filters that are applied to all widgets that are connected to them, and therefore you can control the shown data on the whole dashboard by setting these filters. They are fully configurable.

Personal statement (report)

Personal statement is a specially arranged view of spent time for a single user for themselves. It can be accessed via GLOBAL MENU > TIME REPORTS > PERSONAL STATEMENT – in the right menu of the Time reports dashboard.

On the first page, you will find the filterable list, which, again, may be used for chart views, as well. You, as an administrator, may prepare some saved filters for your users so they won't always need to prepare the reports ad hoc. This is where they would find the filters and generate their reports with one click.

On the second tab, called **Report** you can build pivot tables. How do these work? It is very simple, just: 1) Verify the filters; 2) Choose the time detail; 3) Choose attributes to group the report by. There can be any number of attributes.

The screenshot shows the 'Personal statement' report interface. At the top, there is a search bar and navigation icons. Below that, the report title 'Personal statement (3)' is followed by three tabs: 'My montly report 12', 'My yearly report 12', and 'Team members report 100'. There are also 'Filters active' and 'Options' buttons. The main content area has three tabs: 'Details', 'Report', and 'Timesheet'. The 'Report' tab is active, showing a 'Details' dropdown set to 'Month' and an 'Add:' dropdown. Below this is a table with columns: 'User', 'Status', 'Task type', '2023-8', and 'Total time'.

User	Status	Task type	2023-8	Total time
Lea Wolf(Easy Software Support)			26.90 h	26.90 h
	In progress		26.90 h	26.90 h
		Bug	13.25 h	13.25 h
		Issue	13.65 h	13.65 h
Total time			26.90 h	26.90 h

Spent time on project

By clicking on the Spent time item in the project menu, you will practically get into the same type of reports, but for all spent time on the project. It may automatically include subprojects (based on setting in ADMINISTRATION > SETTINGS > TASK TRACKING — Display subprojects tasks on parent projects by default). If this setting is disabled, you will need to select subprojects via a filter.

The same applies as above, on the list, you can make any types of listing or chart reports, on the report tab you can get a pivot table.

Don't forget that project also has its own dashboard where you can also add list, pivot table, gauge or chart with entity spent time for various reports.

Detailed technical documentation (graphs and charts; filters):

<https://www.easypoint.com/documentation/article/graphs-and-charts>

<https://www.easypoint.com/documentation/article/filters-1-0>

Detailed technical documentation (global filters):

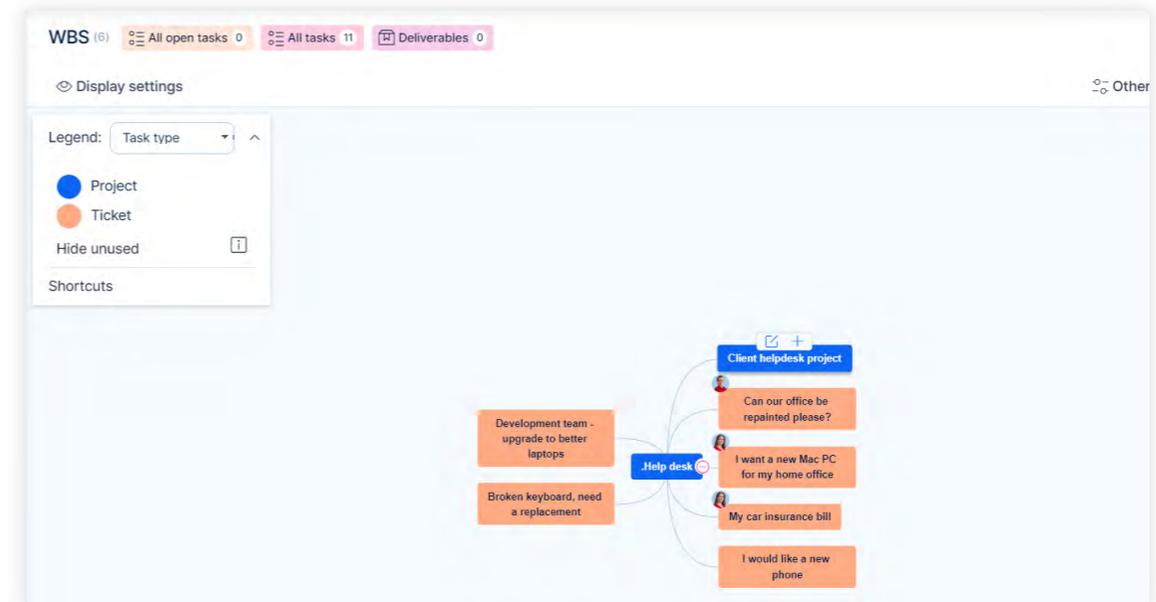
<https://www.easypoint.com/documentation/article/business-dashboards>

7.5 WBS – Work breakdown structure

We are reaching a point where we could end the manual, because you are now familiar enough with the most essential functionality and the rest is described in more detail in the online documentation.

Nevertheless, it would be a shame if we omit at least a couple of words about the key pillars of modern project management, which are built on top of the task/time tracking logic of Easy Project.

Starting with WBS, because it comes into play right at the beginning of project planning. WBS is a tool for task creation in a visual and structured way. From the user perspective, it acts like a mind map of the deliverables and tasks of the project. The advantages of using WBS compared to, say, adding tasks into a table are obvious.



From the technical perspective, for you – the application administrator – it is important to remember some key specifics to ensure seamless use of WBS by your users.

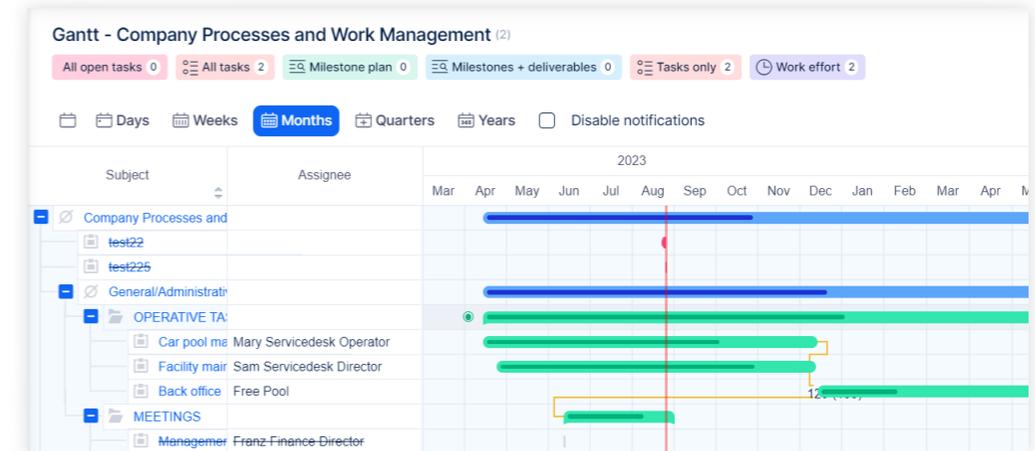
- Allow the field **parent task** on task types – we discussed enabling/disabling fields per task type in chapter 5.4.2. If the field is disabled, you can't create a subtask, because it is in fact defined by value of its field **parent task**.
- **Workflow restrictions** – be careful about any workflow restrictions ([chapter 5.4.4](#)) on task creation or editing. WBS allows to use drag and drop to change the task structure, but also task attributes, such as priority, assignee, etc. If workflow prohibits the user to make some changes, they will only be validated after clicking **Save**. Which means, the user may lose invalid changes and also some of the valid ones that were affected.
- **Autosave changes** – even if you don't click on Save manually, WBS will be automatically saved when: A) User leaves the browser tab with WBS; B) User opens quick task editor; C) After a few minutes of inactivity.

Detailed technical documentation:

<https://www.easyproject.com/documentation/article/wbs-work-breakdown-structure>

7.6 Gantt chart

There is no need to explain the meaning of Gantt chart in project management. But again, like WBS, the Gantt is also a drag and drop component on top of task logic in Easy Project. Therefore, similar rules apply, and you should keep them in mind.



Be careful about workflow rules for users/roles who work with Gantt. The user may prepare a great project plan, but after save, many errors may pop-up due to various validations in case of strict configurations.

Default sorting of tasks in Gantt is chronological – earliest are above the later ones. Naturally, parent-sub task structure as well as milestones are also taken into account (earlier task belonging to a milestone with a later date is shown lower than a later task belonging to a milestone with earlier date).

Finally, to translate into technical terms, moving tasks in Gantt practically means changing task attributes – **start** and **due date**. By clicking on the task name in Gantt, you will open the quick task editor that is also used to change task attributes. The changes have to be saved in Gantt by clicking **Save** to take effect in the system.

Detailed technical documentation: <https://www.easyproject.com/documentation/article/gantt-chart>.

8

Personal work management

- 8.1 Meeting calendar / Scheduler
- 8.2 Activity feed
- 8.3 Email notifications
- 8.4 To-do list

We explained various application behavior based on settings and configurations, then we went through the crucial entities from the top (projects) through tasks down to time entries. Finally, it is time to give some attention to the people, users of the application and their perspective.

It is worth repeating that the main page of each user is their **own dashboard**, which was discussed in chapter 5.2.6. Even the user who spends the majority of the day on various specialized dashboards, reports or operation pages, their own dashboard still has its function.

It is the first page that you visit after logging in — and you see what awaits you on the day; and should be the last page before you log out — log time, prepare the next day schedule. This page should always be the most familiar to every user. Which is a reminder that it should contain only things that the user really needs to see every day. Secondary info can be provided in form of links or menus.

"My dashboard" is just one of the functionalities which help users manage their work. Let us introduce the other personal management features.

8.1 Calendar

The calendar is always available for your disposal in the top panel. It contains meetings created within Easy Project, or imported meetings, of you or your selected colleagues. It also visualizes your planned hourly allocations on tasks, absence entries (via attendance), holidays (from working calendar) or sales activities. Importing external events can be done via CalDAV or iCal. Same options are available for event exports.

Detailed technical documentation:

Calendar: <https://www.easypoint.com/documentation/article/scheduler>

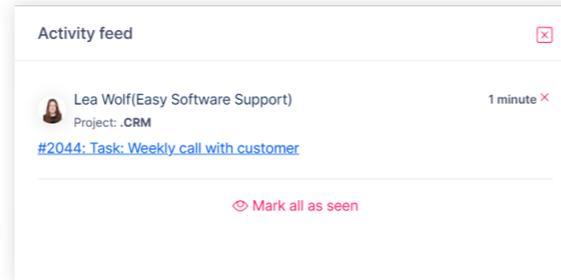
iCal: <https://www.easypoint.com/documentation/article/ical-synchronization>

CalDAV: <https://www.easypoint.com/documentation/article/caldav-synchronize-your-calendar-in-easy-project-to-your-mobile-device>

8.2 Activity feed

For users who will spend a significant amount of time working directly in Easy Project, there is a neat in-app channel that informs you about progress on relevant tasks.

You will find it in the top bar. It contains **unread comments on tasks where you are the assignee, author, or coworker**. When you visit the task and see the comment, that item will automatically disappear from activity feed.



A more robust form of activity feed is available as a widget, but that one is not at hand throughout the whole application.

Detailed technical documentation:

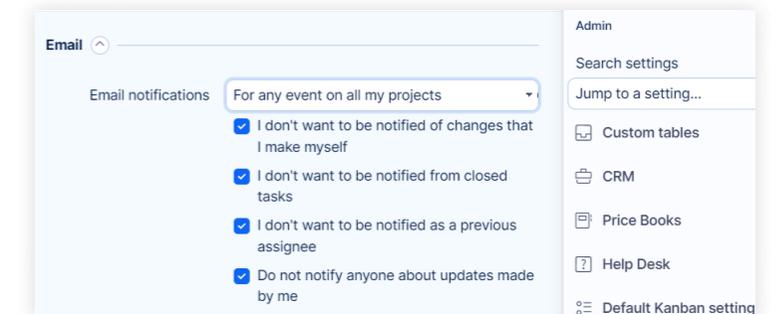
<https://www.easypoint.com/documentation/article/activity-feed>

8.3 Email notifications

While activity feed is most useful when you are logged in the application, in the other case, when you are away, you may take advantage of the email notifications.

Every user (who is allowed to edit their own profile) can choose their level of email notifications. From complete silence to full information flow and various options in-between based on their proximity to the events (task updates).

Please bear in mind that the more users, projects and tasks your application has, the number of email notifications may rise exponentially. In such cases, we recommend using the option **Only for things I am assigned to**.



Filters on email client

There is another side to the story — the email client (Outlook, Thunderbird, etc.). Although the application may generate many emails, you can still have order in them. Here are a few tips about setting up your email client:

- Create a folder for notifications from Easy Project — you don't want these emails in your main inbox. Use email filter **From** (or **Sender**) for the emission address (**chapter 5.1.5**).
- You may create a special folder for notifications about **your** tasks — notifications from tasks assigned to you will have a subject containing either **Your task has been updated** or **New task for you**.
- Notifications from newly created tasks always contain text **New task** in the subject.

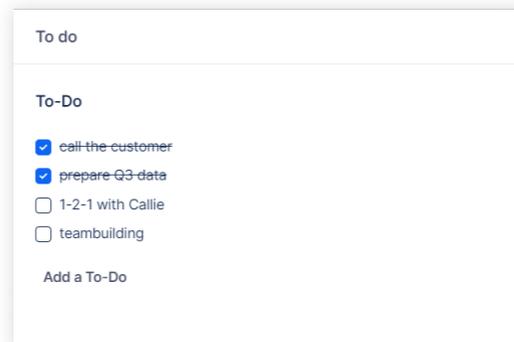
- Based on the above information you may separate task notifications into separate folders and keep all the other notifications in a folder called "Others" – these may also contain notifications from events not regarding tasks.

Please trust us, if you are in a state where you are receiving 100+ daily notifications from Easy Project, then at least separating [My tasks](#) from the rest becomes great help to you and your mailbox.

8.4 To-do list

A very simple tool, but worth its own chapter. The to-do list is available permanently in the top bar and can keep your notes, tasks, useful links, reminders, cheat sheets, etc.

Multiple lists can be enabled in:
ADMINISTRATION > PLUGINS > QUICK
"TO-DO" REMINDERS — CONFIGURATION.



Thank you

On behalf of Easy Software, I would like to graciously thank you for dedicating your time to reading this publication. Whether you are a business owner, manager, team leader, self-proprietor, non-profit representative, public sector employee, junior application admin, project management matador or an engaged user, you have proven how important it is for you that your colleagues or community can cooperate in the most effective and frictionless way.

It is the mission of Easy Software to make the everyday life of software users easier and more convenient using professional tools with visual outputs. One of those tools is Easy Project and I hope this guide provided the relevant answers, tips and guidance to help you achieve that in your organization.

I wish you every success in your activities directly or indirectly supported by Easy Project.

Sincerely,

Robert Kovacik
Head of Quality

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