QUICK START TUTORIAL

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Welcome

Thank you for your interest in Easy Projects .NET – a complete latest generation web-based project management and task tracking software.

Using multi-nested projects and tasks, referred to by a general term of *activities*, — see Chapter 2 Glossary of EP .NET Terms below – detailed statistics and reports, email notifications and alerts, *issue* and *request* tracking, message board and other useful features you will be able to track and organize virtually any type of project with the help of Easy Projects .NET. Your team will be able to communicate effectively during all stages of the project life cycle, facilitating successful delivery of results on time and within the budget.

While it is a versatile and multi-function tool, it is extremely easy to use, too. It has an intuitive, user friendly interface, and only those controls that you really need. Moreover, more often than not you will find the software to allow you to access various functions or areas in different ways, offering you unparalleled flexibility and satisfaction.

How to Use This Tutorial

Chapter 1 discusses conventions used in this document. This information will help you better understand various formatting styles, such as that names in bold CAPITALS denote those of main menu items, etc.

The subject of Chapter 2 is a glossary of key *entities, units and terms* that Easy Projects .NET features.

Chapters from 3 onward deal with actual Easy Projects .NET features and capabilities, as follows:

Chapter 3. Managing Users and Roles
Chapter 4. Managing Projects and Activities
Chapter 5. Message Board, File Attachments, Time Logs, Timer
Chapter 6. Reports and Billing
Chapter 7. Summary: Typical EP .NET Workflow

And, the chapter titled “Useful References” concludes this Tutorial.

In the tutorial, you will follow a series of straightforward, step-by-step instructions on how to use Ease Projects .NET for the first time.

When you finish the tutorial, you'll be an expert enough to manage your own projects using this very helpful software, as you will have a chance to see for yourself.

Chapter 1

Conventions

The following conventions are used throughout this tutorial:

CONVENTION	WHAT IT DENOTES
BOLD CAPS	Main menu items
CAPS	Submenu items
Bold text	Command on a menu, item on a list, or the name of a checkbox, radio button, etc.
Single quotes, e.g. 'Open'	Button

Chapter 2

Glossary of EP .NET Terms

To help you become familiar with items and terms used in Easy Projects .NET, here's a list of the most frequently used ones.

TERM	DEFINITION
Users	These are the actors in Easy Projects .NET. Any project is not worthwhile unless it has a sufficient number of competent people to carry it out. Easy Projects .NET is licensed per user. Accordingly, if you are planning to have 10 people on a project to be managed using Easy Projects .NET, make sure you purchase at least 10 of those[1].
Role	A name for what an employee or project teammate is supposed to do in line with his job description. Easy Projects .NET comes with 4 built-in (undeletable) systemic roles and 3 more, predefined for your convenience, ones.
Administrator	A built-in role that enjoys unlimited access to the system. One of Administrator's key functions is that of managing users and roles. Another important function is 'fine tuning' the system, such as by creating custom fields or adding new project categories or statuses.
Permissions	Access rights that are part of a role's functional content. Each role has its own pattern of permissions that ensures that user can (or cannot) take certain actions toward a project it is or is not a member of.
Project	In the broad sense: A temporary endeavor undertaken to create a product or service. In the EP .NET sense, it is a system of attributes that emulate a real-life project so

[1] One exception is so-called 'cannot login', or 'resource' users who do not require a license. See Tips 3 & 4 and Chapter 3 for more details.

	helping project managers to manage it. Key properties of an EP .NET project include name (ID), start and end date, status (open, closed), project members, and completion rate.
Activity	'Building blocks' for a project, *activities* have many similar attributes, as compared to project, but also some unique ones. Activity team members (referred to as activity assignees) are drawn from the respective project's members. See also **Activity type**.
Sub-activity	Easy Projects .NET allows for nesting activities. It helps project manager to address real life situations when a large block of work needs to be broken into smaller pieces. In every respect, other than having a parent activity above it, a sub-activity is as good as an activity.
Activity type	There are 3 types to choose from while creating an activity in Easy Projects. Type 1: Task. Type 2: Issue. Type 3: Request. In the context of EP .NET, *tasks* are supposed to mean any assignments within the project necessary for achieving its goals. Unlike tasks, *issues* are supposed to mean assignments that are undertaken to address errors, contingencies, emergencies, etc. *Requests*, on the other hand, include jobs or assignments requested by customer or other authorized parties. Examples: 1. Mounting an assembly line as part of a production project would be a *task*. 2. Fixing a mistake in a construction design would be an *issue*. 3. Adding a new feature to a software product under development would be a *request*.

For more detailed information about EP .NET terms and definitions, please refer to EP .NET Online Help at http://www.easyprojects.net/help.

Chapter 3

Managing Users and Roles

Chapter Overview:

3.1 Background

When you purchase Easy Projects .NET, a number of licenses are supplied with it, or, more precisely, as many as you request when you place your order.

One user per license can be added to the system to become part of the project management process you organize based on Easy Projects .NET. Make sure you have purchased a sufficient number of licenses to meet your needs in manpower.

Next, much the same as an employee in real life, a user is supposed to play a *role*. To keep it simple, think of a role on an Easy Projects .NET project as a job position a person (user) is supposed to assume as he or she joins your project team. For more details, refer to Chapter 2.

In terms of Easy Projects .NET, any role comes with a set of permissions which are, as simple as it sounds, some pre-set actions users are allowed (when respective permission is enabled in their role, i.e. the checkbox next to the permission is selected), or not (when permission is disabled, i.e. the checkbox is clear) to perform in the context of a project. There are over 40 permissions a user

Tip 1

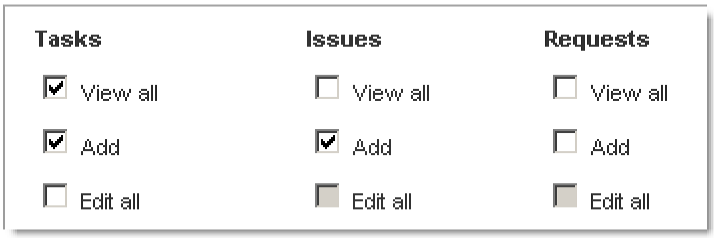
If the role you would like the user to have on your project is not yet on the list, assign the user any role for the time being, long shot or not. Refer to 3.3.1 below for details on how to create a role that meets your needs. As soon as you have created the role you can have the user re-assigned to the correct role.

Tip 2:

If you plan to add more than one user in one session, consider clicking Save and add similar - This saves time.

has got in his/her role, some enabled and some not.

Here's an illustration of some permissions in a role:



If you had this pattern of permissions you would be able to view and add tasks (see 'Adding Tasks' below), add but not view issues (see 'Adding Tasks' below), and have no control over requests. For a definition of tasks, issues and requests, refer to Chapter 2.

Naturally, you can create as many new roles, or edit permissions in the available roles as you wish. Unlike users, whose number is *limited to that of purchased licenses* (save 'cannot login' or 'disabled' users, see Tip 3 & 4) there is no limit as to how many roles you can create.

3.2 Adding Users

To add a user, these are the steps to take:

1. Go to **ADMINISTRATION** → USERS.
2. Click 'Add a new user'.
3. Fill in user details:
    a. Name the user,
    b. Type a login the user will use to access the system, such as to log his working hours, post a memo on message board, report a bug, etc.,
    c. Select a role for the user from a list of available ones,
    d. Specify and confirm password,
    e. Specify a valid email address. NOTE. Easy Projects .NET has a built-in email notification system, a handy tool top keep your project members posted day and night (see 5.2 below),
    f. Type in an hourly rate.
4. Click 'Save and close'.

Tip 3:

Creating a 'cannot login' user can be a very useful option. Such user does not require an EP license as one unable to login. However, you can still use users of this kind for some non-key tasks, e.g. driving and having the office car serviced and reporting mileage, or to keep track of who is responsible for valuable items, e.g. an overhead projector, etc.

Tip 4:

Users you wish no longer be an active part of the system without deleting them, can be 'disabled'. Disabling a user frees up a license to add an active user.

Tip 5:

You can personalize users a great deal by using *avatars*. Any image up to 800Kb in size can by used as one.

3.3 Assigning Roles

For example, you have an office manager job on your project which you would like to fill. On reviewing available roles supplied with your Easy Projects .NET package, you have not found one named 'Office Manager' on the list. In this situation creating a new role is the right thing to do.

Tip 6:

Unlike users, you can create as many roles as may be required.

3.3.1 Creating a role to meet your needs

Go to **ADMINISTRATION** → ROLES.
Click 'Create a new role'.
Fill in role details:

a. Name the role,
b. Give it a brief description (optional),
c. Specify an hourly rate (this will be the default rate for users this role is assigned to),

4. Copy permissions from a similar role, if applicable (Optional),
5. Create a pattern of permissions as you see fit for the role.

When you are done, click 'Save and close'.

6. Repeat as many times as there are roles you wish to add.

Tip 7:

To give you a bit of extra flexibility in real life situations, Easy Projects .NET allows you to change the role and/or permissions of a project member. It does not affect the baseline, 'nominal' role. It is achieved through memorizing each user's permission pattern on an individual basis.

3.3.2 Assigning Role to User

Now that you have added a user and created a role, you can assign the role to the user.

The steps to take are as follows:

1. Go to **ADMINISTRATION** → USERS.
2. Click on the name of the user you want assigned.
3. Select the correct role from a drop-down list of available roles.
4. Click 'Save and close'.

There is an alternative to the above process. Instead of *adding a user*, you might start from *creating a role* for a not-yet-added user. There is not much difference indeed.

3.4 Summary

In this chapter you have learned how to add a user with a role, and create a role to meet your needs. To summarize, here's a few conclusions:

1. Make sure you have enough EP .NET licenses to cover your needs in staffing your project. However, you can create as many 'resource' users as you may need, with no license to pay for. Also, see paragraph 4 below and Tip 3 above.
2. It is best to have a clear picture beforehand regarding what users to add and roles to create. This will help save time and avoid confusion.
3. Roles are easy to modify at any time. Therefore, don't spend too much time figuring out what exactly permissions to grant to the users. You can always revise their roles at any stage into the project.
4. Make the most of Easy Projects .NET by creating so-called 'resource' users, that is ones that cannot log in, but who can be assigned on activities and thus involved in the project cycle… at no cost in terms of EP licenses.

Tip 8:

When adding users make sure you specify their correct email address for them to be able to benefit from the EP .NET notification system. See Chapter 5 for more details.

Chapter 4

Managing Projects and Activities

Chapter Overview:

4.1 PREPARATIONS

Before starting to create an Easy Projects .NET project, it is best to take a little time making a checklist covering the main aspects of the project. These might include:

✓ Project start and end dates, or start date and duration.

✓ How many work hours or days it is going to take, especially if you plan to bill your customer per hour. At any rate, it may be good to know.

✓ Make up a list of people that are going to become part of the project team, including non-key ones, that is, ones you do not plan to grant access rights, i.e. 'resource' users who do not require an EP license and who may not login. Refer to Tip 3 above for details.

✓ Since any project consists of activities, plan on as many ones you are going to create under the project as possible.

Key aspects to cover while drawing up the list of activities might include:

- Activity's start and end dates,

Tip 9:

Other great resources to help you learn about creating projects and tasks in Easy Projects .NET include EP .NET video tutorials and user manual available online at http://www.easyprojects.net

Tip 10:

Easy Projects .NET allows identifying activities as being one of 3 types: Task, Issue, and Request. This enables you to let certain users (through modifying their permissions) view, add, and/or edit activities of certain type. For example, a user might bring his colleagues attention to a problem encountered while doing a 'task', by adding an 'issue'.

- Its 'estimated hours', i.e. how many work hours it is going to take. Again, it mainly applies to projects where you bill your customer an agreed number of work hours at a rate.
- You could also think at this stage whether some of the activities really have a 'dependence' on some other, e.g. you might like one activity to start as soon as another finishes, or a third one would be best to start 2 days after another starts, etc. Easy Projects .NET has a special feature to handle dependencies of this sort, called Activity Dependency which is easily tuned up. Refer to EP .NET Activity Dependency Video Tutorial for details. Make a separate list of such activities.
- And last but not the least, you should decide what kind of billing each of the activities should have, as Easy Projects .NET offers you a number of options to choose from. For example, if you are planning to charge your customer per each billable hour your project team has spent working on an activity, you will want to select 'Hourly rate' as the activity's billing option.

✓ The same way as for activities, work out in advance what type of billing the project itself is going to have.

When you are through with compiling the list, you can start feeding items on your list into Easy Projects .NET, creating first a project, and then activities under it. As you are well into the process you will be sure to appreciate that having key points outlined on paper beforehand was indeed a good start.

4.2 Creating Project

The procedure below describes how to create a project in Easy Projects .NET. A detailed video presentation on how to create an EP .NET project is found at www.easyprojects.net (a Flash player is required), under

Tip 10 (cont.):

Or he could send in a 'request' to the effect that he would like to be re-assigned to another 'task'. This arrangement allows covering great many a real life project management situation.

Tip 11:

The key navigation tool in Easy Projects .NET is Header Menu, a dark-blue bar across the top of the screen. While there are other ways to navigate, it is the most apparent one and within immediate reach.

Tip 12:

Activity Auto-assign feature is useful if you want to assign a certain user on tasks, another one on issues and a third one on requests in an automatic manner. Consider an example. Some other users may have access to your project, such as your boss. Suppose, the user has permission to add tasks, issues, or requests to your project. On the other hand, he may be lacking permission to view and manage activity assignees. This is when the auto-assign feature comes in handy.

'Easy to Learn'.

To create a project:

1. Go to **PROJECTS & TASKS** → PROJECTS.
2. Click 'Create a new project'.

3. Fill out a project details form. If you have your checklist from the previous stage (see 2.1 Preparation above) to consult, this will present no difficulty. See Tip 9 for additional information.

4. Upon completing the form, click 'Save' to apply changes.

4.3 Portfolios

The projects you create can be grouped as *portfolios*. Portfolios are convenient when you have quite too many projects to handle. You can always print out available portfolios using Portfolio Report.

4.4 Creating Activity

Creating activities is very similar to creating projects.

To create an activity:

1. Go to **PROJECTS & TASKS** → Tasks.
2. Click 'Create a new activity'. An activity details form opens.

3. Fill out the form. There are mandatory fields on the form as well as optional. You can always revise activity details by choosing the **Edit Activity** command wherever it is available. See Tip 13.

4. Click 'Save and add similar' to add more activities to the same project, otherwise click 'Save and close'.

4.5 Creating Child Activity (Sub-activity)

There are situations when you would rather break an activity into smaller ones. For example, arranging your son or daughter's wedding party would consist of a number of errands, to-dos and arrangements, which may be far smaller in scale than the party itself.

To create a sub-activity (also called 'child activity'), the set of required steps is similar to that for an activity. Refer to 2.3. The only difference indeed is that, in

Tip 12 (cont.):

The same applies to adding tasks by email, which is also possible with Easy Projects. NET. In both cases the 'auto-assign' project member will be the assignee by default.

Tip 13:

Most EP .NET screens have the Quick Action Panel that allows you to take various actions quickly whenever you need to. To find one, look for it on the left-hand border of the screen, right below Header Menu. It is a white rectangle with 'Open Quick Panel' written on it from bottom to top.

Tip 14:

Most EP .NET list of items, such as projects, activities, or users, have a context-sensitive popup menu. To pop up the menu, click anywhere on the row of the item in question BUT its name.

addition, you need to select a parent activity from a list of available activities while filling out the details form.

Again, you can use the 'Save and add similar' button to add more child activities to the same parent.

4.6 Milestones

Easy Projects .NET allows creating a special type of activity, called *milestone*. Used mainly in software development business, milestones are a vital part of project planning.

Milestone activities show on GANTT charts differently to assist separating them from other activities. For GANTT charts and Milestone report, see Chapter 6 Reports and Billing.

Tip 14 (cont.):

Ignoring the last requirement will result in that item's details page opening instead. Whenever a row changes color as you mouse over it, it indicates that there is a pop-up menu attached to it.

4.7 Activity Dependency

In Easy Projects .NET, any activity can be set to start depending on when another activity starts or finishes.

It can be very helpful when an activity has a change in its starting or ending date. When this happens you do not need to go and change these for the 'dependent' activity as the program will do it all for you.

To set a dependency for an activity:

1. Open the activity's details page by clicking on its name on the list of activities.

2. In the Activity Dependency section, select the type of dependency: Starts when started, Start when finished or Finished when started.

3. Select the master activity, i.e. the one that the start date of the current one will now be linked to.

4. Type in a delay in days as an integer, positive or negative.

5. Click 'Save' to apply the changes.

Tip 15:

When the delay in Activity Dependency is given as a negative integer number, e.g.

'-3', it indicates that the starting date of the dependent activity will occur the given number of days PRIOR to the reference date.

Chapter 5

Dashboard, Message Board, Notifications, File Attachments, Time Logs, Timer

Chapter Overview:

5.1 Dashboard

Although not impossible, it would be quite unhandy to drive a car without a dashboard. It is the first place to consult if you have any doubt about the health of your car. For your convenience, Easy Projects .NET has Dashboard too, designed to dramatically improve your project management experience.

A highly customizable tool, Dashboard is made of a set of 'gauges' of you own choice.

The gauges include:

- Calendar
- Open issues
- Open requests
- Activities

Tip 16:

Any activity displayed on Dashboard can be accessed by clicking on its name.

Tip 17:

Once your message appears on a list of available messages, you can edit or delete it.

- Delayed activities
- Overbudget activities
- What's new this week
- Estimated vs. Actual
- Project health
- Etc.

With Dashboard, you have total control of your projects and activities, and the more of them you have, the more useful Dashboard can be.

Tip 18:

If you change the default rule it will apply to all future projects you are going to create.
The default rule is designed to fit the most typical situations, but you may like to modify it.

5.2 Message Board

Every Easy Projects .NET project and activity has a message board. It is an ideal place to post messages intended for other project members' or activity assignees' attention.

The best part is you can set up the system to notify you by e-mail in the event a message has been posted (as well as altered or deleted). This will be discussed below under Setting Up Notification System.

Tip 19:

You can check the function of the system by sending a test message. It is done in the Email sending settings section.

To post a message:

1. Go to Project details screen, e.g. PROJECTS & TASKS → PROJECTS → Click on the project's name.
2. Click 'Message board'.
3. Now you can view messages already posted, either all of them, or those within any particular activity.
4. To post a message, select an activity to attach it to.
5. Type the message, and click 'Post'.

As mentioned above, you can have Easy Projects .NET to send out email notifications to people concerned informing them of the fact that a message has been posted. This shortens feedback time dramatically.

Tip 20:

Notifications cannot be sent to limited access or disabled users.

5.3 Setting up Email Notification System

Easy Projects .NET greatly enhances your project management efficiency by enabling you to use automatic email notifications. Consider an example. Suppose, you are running a multinational consultancy project with consultants scattered over three continents. Imagine the pain of letting them all know of any developments within any particular activities, especially if there are a dozen of these. With Easy Projects .NET, you can have them informed on any piece of news, development, or new requirement effortlessly, without bothering even to select their email addresses from a list. With their user details stored securely in the database, all you have to do is create a notification rule which involves but a few mouse clicks.

Here's a list of things Easy Project .NET helps you inform your fellow project members about, 24/7:

1. A task has been: added, edited, assigned, completed, or deleted.
2. An issue has been: added, edited, assigned, completed, or deleted.
3. A request has been: added, edited, assigned, completed, or deleted.
4. A message has been: added, edited, or deleted.
5. A file has been added to project/activity resources, or deleted from there (see 2.7 Attaching files to project/activity below).

To create a notification rule:

1. Go to your project's details screen, e.g. **PROJECTS & TASKS** → PROJECTS → Click on the project's name.
2. Click 'Notifications'.
3. Any project comes with only one pre-set rule, called "Default rule".
4. You can add any number of new rules bearing in mind that Easy Projects .NET uses each notification rule independently of others.

> NOTE: Why so many? — you may ask. Consider an example. Suppose you would like the system to send you, and only you, a notification in the event of a file having been attached to the project. So, you could create two rules that would enable you, on the one hand, to receive notifications that are sent to all project members, and, on the other, also notifications about new file attachments that will be sent only to you, and no one else.

Tip 21:

A rule that is redundant, but rather not to be deleted, can be disabled. As soon as it is disabled, it 'stops working' until re-enabled.

Tip 22:

Should you not need it for some reason the notification system can be disabled. It is done in **OPTIONS**.

1. To add a new rule:
    a. Click ‘Create a new rule’.
    b. Type a name and select checkboxes as appropriate.
    c. Click ‘Save and close’, when you are through.

2. To edit a rule:
    a. Click on the rule’s name (hyperlink).
    b. Make changes as appropriate.
    c. Click ‘Save and close’.

3. To disable a rule (see Tip 12):
    a. Click on the rule’s name (hyperlink).
    b. Select the **Disable rule** checkbox.
    c. Click ‘Save and close’.

Tip 23:

Large size files are best uploaded in a compressed form, or even broken into parts (volumes). Many popular file archivers (WinZIP, WinRAR) support multi-volume archives.

5.4 Attaching Files, such as PDF documents, Excel tables, images, etc., to Project/Activity

Any one who has had experience managing projects will appreciate how much time forwarding documents to various players can consume, with all email delivery problems in our time of anti-spam measures everyone spares no efforts to take, etc. Easy Projects .NET helps avoid frustration this may cause. It allows you to upload a report, Excel table, anything, into a special depository, that is part of your EP .NET project or activity. The best part yet is that, again, you can have the system to send out notifications to everyone concerned the minute the file reaches its destination! Is it not great? You do not have to waste time sending docs, nor have you to even let people know about a new document you have added to project resources. Easy Projects .NET makes things easy for you yet another time.

To attach a file to Project or Activity:

1. Go to project (activity)’s details screen, e.g. **PROJECTS & TASKS** → PROJECTS (or ACTIVITIES) → Click on the project (activity)’s name.
2. In the section **Attached files**, click ‘Browse’.

Tip 24:

You can either open or download a file that has been attached to a project in order to get access to information it contains.

Tip 25:

You can always generate and print out a detailed timesheet covering any user(s) and date range, using Resource Report, Detailed Time Sheet option.

3. In the **File Upload** dialog box, find the file you wish to attach.
4. Click ‘Open’.
5. Add a description of your choice.
6. Click ‘Update’.

The file appears on a list of attachments.

To download a file attached by a project member (activity assignee):

1. Go to project (activity)’s details screen, e.g. **PROJECTS & TASKS** → PROJECTS (ACTIVITY) → Click on the project (activity)’s name.
2. In the section **Attached files**, right click on the name of the file (hyperlink).
3. When prompted to open or save the file, choose as you like.

   NOTE: There may be other methods to download a file. Please refer to your browser's user manual.

Tip 26:

If you would like to add time entry for a project/task not yet added to the EP .NET database, use the Create a new project/task feature of Time Logs.

Tip 27:

Time Usage Chart allows you to see at once any deviation from the expected time usage pattern, and thus be able to take appropriate action quickly.

5.5 TIME LOGS

Billing customers or paying your staff per work hour would be indeed difficult, if there were not a log to record time usage to. Moreover, it would complicate things not only for the project manager or employer, but for other project members or employees almost as much. Effective time tracking is, no doubt, a vital part of project management in any area and at any level.

Any project you create with Easy Projects .NET comes with a time log. It has everything you will ever need from a log: an easy mechanism to log entries, both your own and other activity assignees’[2] ; a statistics area coupled with a time usage bar chart that enables you to spot 'irregularities' in time usage at a glance; and a time log history area with every control and filter you will need. Moreover, if there is a time entry you would like to add to the log of a project/activity, not yet available on the list of projects/activities, you have an option of creating a new project/activity without leaving the screen.

[2] Adding their time entries for other assignees is only available if you have proper permissions in your role. See 1.1.

To add a time entry:

1. Click **TIME LOGS**.
2. Select date, project, activity and assignee whose time entry is being added.
3. Type a decimal equivalent of work hours being added.
4. Type a description.
5. Click 'Record'.

To view time entries logged within a period, e.g. the current month:

1. In **History** section, select criteria in the filters to meet your needs. In the Range filter, select **This month**.
2. Click 'Apply'.
3. A list of time entries meeting the filter criteria will appear.

To edit a time entry:

1. Click any place within the row of the entry to be edited to pop up a menu. Select **Edit this time entry**.
2. Make changes and click 'Update'.

To delete an entry:

1. Click any place within the row of the entry to be edited to pop up a menu. Select **Delete this time entry**.
2. Click 'OK' to confirm deletion.

Tip 28:

It is possible to log time for other users, e.g. at their request, provided you have appropriate permission enabled in your role.

Tip 29:

You can start Timer without selecting project and activity first. In fact it can be used simply for timing your daily activities.

5.6 TIMER

Easy Projects .NET has a built-in timer, which can be used alternatively as a time logger.

As it can be brought up, from the Quick Action Panel at any time, the Timer is a handy and efficient tool.

To time an activity with Timer:

1. Open **Quick Action Panel**.
2. Select 'Show timer'.
3. Select Project and Activity.
4. Click 'Start'.
5. Use 'Pause' to temporarily stop Timer.
6. Use 'Stop' to stop Timer to log the measured time value.
7. Type a description.
8. Type in an adjusted value of time, if required.
9. Click 'Add'.

To log time using Timer:

1. Open **Quick Action Panel**.
2. Select 'Show timer'.
3. Select Project and Activity.
4. Type a time value in Duration.
5. Type in a description.
6. Click Add.

Tip 30:

You can start Timer without selecting project and activity first. In fact it can be used simply for timing your daily activities.

Chapter 6

Reports and Billing

No project management is good enough without proper reporting, be it resource utilization, time sheets, or billing[3]. Easy Projects .NET allows you to produce a variety of reports to meet the most complex needs you may have. For instance, Report Generator allows you to build a customized report from a set of almost any number of fields of any available type. This is not to say that you will need to build your reports from scratch most of the time. On the contrary, there are many pre-set types of reports you can easily generate by clicking a few buttons. To be sure, the Reports drop-down menu consists of 8 items, each linked to a report of some sort.

A table below contains a complete list of reports available in Easy Projects .NET, along with a short description of the typical situation in which you would be likely to run a report of given type. Please note that some reports come in more than one variant, e.g. Resource report. The table has a column named Variant, for such cases.

To access available reports you should go to **REPORTS** in the header menu.

Tip 31:

You can save reports to PDF or Excel, some of the most popular data formats.

Tip 32:

You can save a Gantt chart to disk by selecting Save as on the right click menu.

Tip 33:

A generated Gantt chart can be comfortably printed out by switching to its print-friendly version.

[3] Easy Projects .NET does not use the term ‘invoice’, but ‘billing report’ instead.

Overview of reports available in EP .NET

	Report	Variant	Description
1.	**Summary**	n/a	Provides summary information in 4 sections as follows: 1) Summary by person: Total time utilized by each user per project within a selected date range. 2) Summary by category: Total time utilized per category of projects, with a breakdown per project 3) Summary by project: Total time utilized per project as it falls within a selected date range 4) Summary by customer: Total time utilized per project with them grouped by customer, with project and customer totals.
2.	**Resource Utilization**	*Person Summary*	A summary of user's time utilization within a selected date range
		Detailed Time Sheet	A detailed account of user's time utilization within a selected date range
3.	**Vacation**	n/a	To produce a report based on Users vacations
4	**Billing**	n/a	To produce an invoice or project cost sheet
5	**Portfolios**	n/a	Reporting based around Portfolios
5	**Projects**	n/a	Versatile tool to produce a variety of reports covering many project aspects, including: • Project summary

			• Detailed time sheet • List of activities • List of activities with deadline within a selected range • List of activities with deadline not met • List of projects and activities managed by a selected user • List of activities with actual hours spent on them exceeding estimated hours • List of activities assigned to a selected user • List of activities grouped by project with totals of time used.
5.	**Milestones**	n/a	Allows for generating a report showing milestone activities within a period. Allows using a hierarchical view.
6.	**Gantt Chart**	*Activity Chart*	Displays available activities within a selected period grouped by project.
		Resource Utilization Chart	Displays available activities within a selected period grouped by user.
7.	**Report Generator**	n/a	Allows for generating a custom report from a wide array of data fields.
8.	**Customer Representative Report**	*Project Summary*	Consists of two tables, one showing time spent on activities grouped by project, and the other - time spent on projects grouped by activity type (task, issue or request).
		Detailed Time Sheet	A full listing of time entries within a selected date range for a given project or projects with all activities listed.

Chapter 7

Summary: Typical EP .NET Workflow

This chapter summarizes information given above by describing the typical Easy Projects .NET project management process. Please note that it is a sample workflow and that the real-life workflow at your company may differ from the one described here. In all steps below it is assumed that to be able to take various actions described the respective user must be, first, logged in and, second, have appropriate permissions enabled in their role.

Abbreviations used in the text below:

Admin	=	Administrator
PM	=	Project Manager
AA	=	Activity Assignee
CR	=	Customer Representative

Step 1: Administrator creates users assigning roles to them.

- Admin logs in, goes to **ADMINISTRATION** and selects USERS.
- Clicks ‘Create a new user’.
- Fills out a user details form.
- Save the user.
- Repeats the procedure as many times as required.

Step 2: Administrator revises available roles and creates new ones, if necessary.

- Admin goes to **ADMINISTRATION** and selects ROLES.
- Revises available roles.
- Clicks ‘Create a new role’ if new one needs to be added.
- Fills out a role details form.
- Saves the role.
- Repeats the procedure as many times as required.

Step 3: Project Manager creates a project and its team.

- PM logs in, goes to **PROJECTS & TASKS** and selects PROJECTS.
- Clicks 'Create a new project'.
- Fills out a project details form.
- Selects a user to add to the project team along with its respective role. Clicks 'Add' to put the user on the project team. Repeats the procedure until the team is complete.
- Makes **Auto-assign** settings by selecting one user for *tasks*, one for *issues* and one for *requests* to be assigned on these by default.
- Saves the project.

Step 4: Project Manager reviews permissions or role of the users assigned to the project and modifies them, if necessary. Changed permissions will override default user permissions and will be applicable only for the project where they are set.

- Left click on a user's row in the Project members section to bring up a menu. Select **Edit role and permissions**.
- Either changes permissions in the user's current role, or changes the role altogether by clicking 'Change role'. To apply changes, clicks 'Update'.

Step 5: Project Manager creates activities.

- PM goes to **PROJECTS & TASKS** and selects TASKS.
- Clicks 'Create a new activity'.
- Fills out an activity details form, including type (task, issue or request), and billing options.
- Chooses assignees for the activity.
- Saves the activity.
- Creates as many activities as required using the above procedure.

Step 6: Assignees update the completion rate of their respective activities, as they make progress on them.

- AA logs in, goes to **PROJECTS & TASKS** and selects TASKS.
- Clicks on the name of the activity assigned to him/her.
- Changes the status of the activity.
- Clicks 'Browse' button in the **Attachment** section if there is a need to attach a file, chooses a file, and clicks 'Upload' button.

- Clicks 'View Message Board' button to view messages posted for this activity or to post his/her own.
- Clicks 'Save and close' button.

Step 7: Assignees submit issues by email or manually.

- Team member sends an issue he or she would like added to the list of issues to a designated email address.
- The software automatically picks up the received issue and adds it to a designated project.
- To manually add an issue, team member logs in, adds the issue to the target project and assigns a team member on it, or asks PM to do the assignment.

Step 8: Assignees log their time entries to keep track of the time spent on each project and activity.

- AA logs in, and selects **TIME LOGS**.
- Logs an entry by selecting date, project, activity and specifying duration, and clicking 'Add time entry'.
- In the **History** section, TA can view time entries for a selected period.
- Alternatively, **Timer** can be used to log time automatically or manually.

Step 9: Project Manager monitors progress on the project.

- PM logs in, goes to **PROJECTS & TASKS** and selects DASHBOARD.
- Views information on the dashboard, such as on delayed or overdue tasks, open issue or requests, responses to new messages if any, and, consequently, takes appropriate remedial action.

Step 10: Project Manager monitors team members' time usage.

- PM logs in, clicks on **TIME LOGS**.
- To display relevant time entries, PM uses filters to select user, project, activity, and appropriate date range.
- Alternatively, PM can generate Detailed Time Sheet report.
  To do this, PM goes to **REPORTS** and selects Resource.
  Selects Detailed Time Sheet, user(s), and required data range.
  Clicks 'Apply'.
- PM reviews the report and takes remedial action, if required.

Step 11: Customer reviews interim results and submits issues and/or requests as and when required, PM re-assigns the issue/request, if needed.

- Customer representative logs in, goes to **PROJECTS & TASKS**, selects PROJECTS, and picks up the project in question.
- CR creates an issue or request. If there is a project member assigned on issues or requests through Auto-assign, the issue/request gets assigned to the project member automatically.
- PM gets informed about the fact by email notification or directly from CR, and may choose to re-assign the issue/request as sees fit.

Step 12: Customer representative produces Customer Representative report as and when required to track progress on activities the CR is concerned with.

- CR logs in, goes to **REPORTS** and selects **Customer Rep.**
- Selects project(s) and data range to cover, and clicks 'Apply'.

Step 13: Project members exchange messages using Message board.

- AA logs in, and goes to PROJECTS page.
- Pops up a project's context menu and selects **Show project messages**.
- Reviews messages currently posted on the board, and posts his/her own if needed.

Step 14: Project members create Calendar events, including group ones.

- Project member logs in, goes to **TOOLS**, and selects CALENDAR.
- Clicks on a date cell and specifies the name of the event. Clicks Specify more details if wishes to create a group event.
- Fills in the fields and adds other users to share the event.
- Clicks 'Save' to put the event on the calendar.

Step 15: Project Manager generates reports to review and assess different aspects of project implementation.

- Project manager logs in, goes to **REPORTS** and selects a report to produce.
- Fills in all required fields and uses available controls as appropriate.
- Reviews the report on screen, or prints it out.

Step 16: As soon as all activities are completed, including issues and requests, Project Manager closes the project.

- PM logs in, goes to PROJECTS screen and opens the project.
- Changes the project's status from **Open** to **Completed**.
- Clicks 'Save and close'.

Useful References

The links below offer further reading and other opportunities for you to learn more about Easy Projects .NET, your reliable assistant in project management and task tracking.

Easy Projects .NET Official Site: http://www.easyprojects.net

15-Day Free Online Trial: http://www.easyprojects.net/onlinetrial.asp

Quick Tour: http://www.easyprojects.net/QuickTour/

EP .NET Webinars: http://www.easyprojects.net/webinars.asp

Comparative matrix: http://www.easyprojects.net/Competitive_Matrix.pdf

Video Tutorials: http://www.easyprojects.net/tutorials.asp

Online Help: http://www.easyprojects.net/Help/ep5.htm

Testimonials: http://www.easyprojects.net/testimonials.asp

White paper on setting up Easy Projects .NET:

http://www.easyprojects.net/downloads/TheDevilIsInTheDetails.pdf