

# ***The Devil's in the Details***

*A suggested approach to setting up an Easy Projects .NET system, by Pam Kurschner, PHR*

After 20 years of managing software development projects, I've learned many tricks of the trade that help me to stay organized, focus on what's important when it's important, minimize my efforts, maximize my resources, and at all times track my costs and stay within my allotted time. All these efforts can be summed up in one word....details.

*The devil's in the details* is especially true when it comes to project management. For a project manager, managing the details of a project and having the support of the project team is paramount to a successful project. The team must feel like the processes and tools put in place are there to support their efforts, not create more work.

Easy Projects is a great tool for managing the details of a project because it offers flexibility, ease of use, time tracking, and access to the tool from any location (web based).

Here are some basic guidelines for greater success in implementing Easy Projects:

- Clearly identify the team members and their roles and responsibilities.
- Setup a project as a single entity within Easy Projects. Avoid splitting segments of a project as separate projects, they belong together.
- Disable **notification rules** for the project until after the project has been setup and tested. Being bombarded with e-mail notifications is annoying during setup.
- Identify the **categories** that help define the type of Tasks, Requests. Examples of task and request categories may include Reporting, Training, Hardware, Software, Analysis, etc.
- Define the **statuses** associated with Tasks and Requests. Statuses may include Awaiting Design Specs, In Development, On Hold, Complete, Under Review, etc.
- Establishing **priorities** may include Urgent, High, Medium, Low, Nice to Have, etc.
- If the Bug reporting feature of Easy Projects will be used, identify the **type** of bugs that may be needed. Bug types typically refer to interface, design, logic, calculation, and so on.
- After entering the Project and Task details into Easy Projects, give Easy Projects a test run. Experiment using Filters and the Report Generator to make sure information can be retrieved in a logical manner. If necessary,

change the categories, statuses and priorities to facilitate retrieving information.

- TIP: Adding a leading number to the title of a task will provide order to the task list when displayed by title. An example, “01 Import Conversion Data,” “02 Capitalized Freight,” will display in order of the leading number. Otherwise, the titles are displayed alphabetically instead of logical order.
- TIP: Creating a task with a status called “Sub Topic Specific” will provide a “Parent” task in which sub tasks can be added. An example parent task of “Development Top Priority,” with sub tasks of “01 Import Conversion Data” and “02 Capitalized Freight” will provide a method of viewing all top priority development items within the parent task “Development Top Priority.”
- **Attach** any support documents to the associated tasks. Making all resources available to all team members is important. Let Easy Projects be the “place to go” for all project related materials.
- Test a user role by logging into Easy Projects as a team member. Make sure that project information is accessible to the team member based on his/her role.
- After testing, turn back on the **notification** rules for the project.
- Write and distribute a brief “user’s guide” for Easy Projects. Outline the usage of only the features pertaining to the team member’s use of Easy Projects. For instance, the user’s guide may only include topics for login, using the filters on the task screen, time entries and reports. Include screen shots when appropriate. Also include a daily, weekly and monthly list of user responsibilities for updating Easy Projects. These documents should be attached to the project for any team member to access.
- Finally, conduct a training session for the team members. It’s important to get them on board and make the most out of using Easy Projects. Training is best done in person, hands on; however, remote training is also an option.

In conclusion, the only way to measure the success or failure of a project is by looking back over the details. Every project with recorded details becomes an invaluable benchmark and lessons learned for the next project. Success is just a word without the details to support the claim.

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