easyprojects.net

TUTORIAL

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Contents

Introduction

Welcome to Easy Projects .NET Tutorial. Easy Projects .NET is a simple to use and efficient Web based system, which allows you to manage and track your software development projects.

Using multi-nesting projects and tasks, detailed statistics and reports, email notifications and alerts, issue and requests 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 and collaborate effectively during all stages of the project life cycle, facilitating successful delivery of results on time and within a budget.

Conventions Used in This Guide

The following conventions are used throughout this tutorial:

Convention	Indicates
Bold Text (14pt)	Objects, attributes, entities
BOLD CAPS	Names of tabs
CAPS	Names of sub-tabs
SMALL CAPS	Names of sections
Bold Text (12 pt)	Names of buttons
Italic	Names of tool tips

1. GETTING STARTED

Major objects

The major objects, entities and attributes of Easy Projects .NET are:

Users: User is a person participating in the process. Created by Administrator, User is a valuable member of the process whose duties and obligations are defined according to the assigned role. The number of users is limited by the license, obtained from Logic Software.

Roles: Role is a function that User performs in your process. Roles can be predefined and customized. There are six basic built-in roles:

> **Administrator:** Administrator is the main user of the system who has access to all its resources and can use all its features. His main task is managing users and application settings.
>
> **Supervisor:** Supervisor is a person whose main duty is to supervise the process of software development.
>
> **Project manager (PM):** PM is a person responsible for managing the particular project.
>
> **Developer:** Developer is a person whose main task is to develop the software according to the project plan
>
> **Quality assurance Engineer (QA):** QA is a person whose main task is to ensure that the developed software meets the project quality standards.
>
> **Customer:** Customer is a user of the company products and/or services, who has access to the system and by default is able to submit requests and bugs during and after the project has been developed.

Permissions: Permissions are privileges that determine User's access to the system and the duties he has to perform. By default, User possesses a set of permissions in relation to his role but Permissions is a customizable unit that can be set for particular situations and purposes.

Projects: Project is an autonomous unit created by Project Manager that contains its own customized components such as Status, Category, Billing rate and Users assigned to it by Project Manager. The components of one project are completely independent from those of another one. The number of projects is unlimited. Projects are divided into tasks.

Statuses: Status is a state of the project at the particular moment. It enables Users to track the progress of the project and its related activities. Statuses can be predefined and customized.

Categories: Category is a task type that makes the process of tasks classification much easier. Categories can be predefined and customized.

Tasks: Task is a part of the project created for fulfilling a certain problem. The task can be assigned to any member of this particular project. Tasks can be single and nested (divided into Subtasks and assigned to various team members).

Bugs: Bug is a problem found in the project and submitted by any team member or Customer during the testing phase of the software.

Requests: Request is usually a demand of Customer that should be taken into consideration in the process of project development. Submitted by Project manager on behalf of Customer or by Customer himself, Request is assigned to Developers, members of the particular project to which this request is applicable.

Message Board: Message Board is a means of communication used by all users of the system.

Reports: Report is a project statistics tool that can be used by Project User to track the progress of the projects.

Time Sheet: Time Sheet is a means of time tracking. It is used by all users for managing their time.

Typical Project Workflow

This section describes a typical project management process implemented with the help of Easy Projects .NET. Please note that it is just a sample workflow and that the real-life process in your company may differ from the one described here.

Step1: Administrator creates users assigning roles to them

- Administrator logs into the system, chooses the tab **USERS** and the sub-tab USERS
- Clicks **Create New User** button
- Enters all necessary information about the user: his name, his display name, role, password, e-mail and default hourly rate.
- Clicks **Save and Close** button

Step2: Administrator revises a list of built-in roles and creates new ones if necessary

- Administrator logs into the system, chooses the tab **USERS** and the sub tab ROLES
- Revises a list of all built-in roles
- Clicks **Create New Role** button to add a new role
- Enters all necessary information about this role: its name, the name of a built-in role, on permissions of which permissions of a new one will be based, its default hourly rate and description.
- Clicks **Save and Close** button

Step3: Project Manager creates a project and assigns users to it

- Project Manager logs into the system, chooses the tab **MY PROJECTS** and the sub tab PROJECTS
- Clicks **Create New Project** button

- Enters all necessary information about the project: its name, status, est. completion date, est. duration, its description
- Clicks **Assign** button in the ASSIGNMENT section to assign members to the project
- From the list of users chooses those who will be assigned to this project assigning them roles that they will perform in this project
- Clicks **Save** button
- Selects a user to whom bugs and requests will be assigned in the AUTO-ASSIGN CONFIGURATION section
- Clicks **Save and close** button

Step4: Project Manager revises the permissions of the users assigned to the project and changes them if necessary. Changed permissions will override default user permissions and will be applicable only for the project where they are set

- Project Manager logs into the system, chooses the tab **MY PROJECTS** and the sub tab PROJECTS
- Selects a necessary project in the project list
- Clicks Assign button in the ASSIGNMENT section
- Clicks in the column Permissions the click the icon (pen) with the tool tip ***Edit*** in front of the name of the user assigned to the project whose permissions he wants to change
- Changes user permissions at her discretion
- Clicks **Save and Close** button
- Clicks **Save** button
- Clicks **Save and Close** button

Step5: Project Manager creates tasks

- Project Manager logs into the system, chooses the tab **MY PROJECTS** and the sub tab TASKS
- Clicks **Create New Task** button
- Enters all necessary information about the task: its name, the name of the project which past it is supposed to be, the name of parent Task (root task in case of a single task), category, status, est. completion date, est. duration, its description
- Chooses in the ASSIGNMENT section a member who this task will be assigned to

- Marks the statement "This task is billable" if necessary, selects a rate type according to which the cost of the task will be calculated, sets the amount.
- Clicks **Save and Close** button

Step6: Developers develop the software updating the status of the task assigned to them in the task details

- Developer logs the into system, chooses the tab **MY PROJECTS** and the sub tab TASKS
- Selects the task assigned to him that is under development
- Changes the status of the task
- 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 task or to post his/her own
- Clicks **Save and Close** button

Step7: Team members test the projects and submit bugs to the system

- Team member (usually QA) logs into the system, chooses the tab **MY PROJECTS** and the sub tab BUGS
- Clicks **Submit new bug** button
- Enters all necessary information about the bug such as its summary, the name of the project where it was found, its status, type, priority and description.
- Clicks **Browse** button in the ATTACHMENT section if there is a need to attach a file, chooses a file, and clicks **Upload** button
- Clicks **Save and Close** button

Step8: The users fill their time sheets entries to keep track of the time spent on each project activity

- Team member logs into the system, chooses the tab **TIME LOG**
- Selects the week, for which he wants to add Time Sheet entries
- Enters all necessary information about the activity he/she wants to add such as the name of the project and task he/she worked with, the day and number of spent hours, the description of the activity he/she performed
- Clicks **Add Entry** button

Step9: Project Manager assigns bugs/requests and reassigns them to team members if required.

- Project Manager logs into the system, chooses the tab **MY PROJECTS** and the sub tab BUGS/REQUEST
- Selects a bug/request that was submitted but is unassigned yet
- Selects a team member to whom this bug/request will be assigned
- Enters all necessary information about the bug/request such as its category, est. completion date, est. duration
- Clicks **Save and Close** button

Step10: Developers fix the bugs updating the status of the task that was automatically generated from the bug

- Developer logs into the system, chooses the tab **MY PROJECTS** and the sub tab TASKS
- Selects the task assigned to him that is under development
- Changes the status of the bug from which the task was generated in the **TASK ORIGIN** section
- Changes the status of the task
- 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 task or to post his/her own
- Clicks **Save and Close** button

Step11: Customer tests the product and submits bugs and requests to the system if required

- Customer logs into the system, chooses the tab **MY PROJECTS** and the sub tab BUGS/REQUESTS
- Clicks **Submit New Bug/Request** button
- Enters all necessary information about the bug/request such as its summary, the name of the project where it was found, its status, type, priority and description.
- Clicks **Browse** button in the **ATTACHMENT** section if there is a need to attach a file, chooses a file, and clicks **Upload** button
- Clicks **Save and Close** button

Step12: Project Manager keeps track of the project by verifying the status of project bugs, tasks and requests

- Project manager logs into the system, chooses the tab **MY PROJECTS** and the sub tab TASKS
- Selects a task

- Verifies the status of the bug/request from which the task was generated in the **TASK ORIGIN** section and changes it if necessary
- Verifies the status of the task
- Clicks **View Message Board** button to view messages posted for this task or to post his/her own
- Clicks **Save and Close** button

Step13: Project Manager views reports to have a broader view of the project data

- Project manager logs into the system, chooses the tab **REPORTS**
- According to his objectives he chooses the sub tab and the type of the project. To find out more about reports, their types and the problems that can be solved with their help, click here
- Enters all necessary required information
- Clicks **Refresh** Button

Step14: Project Manager keeps under his control the project progress. When the moment comes that all tasks are accomplished and completed, all bugs are verified and closed, Project Manager closes the project

- Project Manager logs into the system, chooses the tab **MY PROJECTS** and the sub tab PROJECTS
- Selects a necessary project in the project list
- Changes the status of the project from Open into Completed
- Clicks **Save and Close** button

2. User Attributes

Roles & Permissions

Role is a function that a user performs in your organization. The role defines User's obligations and duties.

There are six built-in roles:

- **Administrator**
- **Supervisor**
- **Project Manager**
- **Developer**
- **QA**
- **Customer**

In general, three types of permissions exist:

Role permissions

User permissions

Project Permissions.

Role Permissions: Every role has a certain set of permissions that will be applied on default to every newly created User.

Roles / **Default Permissions**	**Administrator**	**Supervisor**	**Project Manager**	**Customer**	**Developer**	**QA**
Manage users	+	-	-	-	-	-
Assign users to tasks, bugs, requests	+	+	+	-	-	-
Projects						
Add	+	+	+	-	-	-
View	ALL	ALL	OWN	OWN	OWN	OWN
Edit	ALL	OWN	OWN	-	OWN	-
Delete	ALL	OWN	OWN	-	-	-
Tasks						
Add	+	+	+	-	+	+
Access	ALL	ALL	ALL	-	OWN	OWN
Edit	ALL	ALL	ALL	-	OWN	OWN
Delete	ALL	ALL	ALL	-	-	-
Bugs						
Add	+	+	+	+	+	+
Access	ALL	ALL	ALL	OWN	OWN	OWN
Edit	ALL	ALL	ALL	OWN	OWN	OWN
Delete	ALL	ALL	ALL	OWN	-	-

Requests						
Add	+	+	+	+	-	-
Access	ALL	ALL	ALL	OWN	-	-
Edit	ALL	ALL	ALL	OWN	-	-
Delete	ALL	ALL	ALL	OWN	-	-
Time Entries						
Add	+	+	+	-	+	+
Access	ALL	ALL	ALL	-	OWN	OWN
Reports						
Customer	+	+	-	+	-	-
Summary	+	+	+	-	-	-
Bug	+	+	+	-	-	-
Request	+	+	+	-	-	-
Resource	+	+	+	-	-	-
Project	+	+	+	-	-	-

User Permissions: Every User has a set of permissions in relation to the role he is assigned to. These permissions are applicable to all projects to which user is not assigned to.

Project Permissions: Permissions that user has in the project he is assigned to.

All the permissions are easily customizable. It means you can edit the permissions of any role, any user and in any project and even create your own roles with an original set of permissions that will be based on one of built-in sets.

For example, if you want to create Team Leader Role that is supposed to include besides developer's permissions such ones as creating tasks and assigning bugs, requests and tasks, for that you need:

- Choose tab **USERS** and sub tab ROLES
- Press **Create New Role** button
- Insert the name for this role and choose from the dropdown list a built-in role, permissions of which will be taken as a basis for a new role

- After pressing **Save and Close** button click in the column **PERMISSIONS** in front of the name of just created role the icon (pen) with the tool tip ***Edit***
- At the just opened page **PERMISSION EDITOR** add to the checked entries the following:
- Add tasks
- Can assign tasks, bugs and requests
- Press **Save and Close** button

Important!

Role permissions **are overridden** by User Permissions, while User Permissions are overridden by Project ones.

The same user can have different permissions and perform different tasks in different projects. For that, you need while assigning the user to the projects in the Project Assignment section, choose column Permissions in front of his name and give to him the rights that you want him to possess in this project.

For example, you want a developer to have the permissions of project manager in one project and those of developer in the other one. For that you should:

- Open the project in which you want Developer to be Project Manager
- After pressing **Manage Users** button in the **ASSIGNMENT** section, choose his name in the list.
- If he is not assigned to the project yet, you can just easily assign a role of Project Manager to him while adding him to the project; the permissions of this role will be immediately applied to this user. But he will perform this role only in this project.
- If this User is already a member of the project and he performs there already Developer Role, you can expand the permissions he had. For that, in front of his name in the column Permissions click the icon (pen) with the tool tip ***Edit***. At the just opened page **PERMISSIONS EDITOR**, expand permissions of this user checking such entries as:
- Access all tasks, bugs, requests and Time entries
- Edit all tasks, bugs, requests and Time entries
- Delete all tasks, bugs, requests and Time entries
- View all reports
- Press **Save and Close** button

Now in this project your Developer will perform the function of Project Manager but in all others projects he will stay Developer.

3. Reports

General Overview

Easy Projects .NET allows you to generate various types of reports. Reports are an easy and efficient way to have a broader look of project data.

#	If you want to…	Use
1	Review how much time spent on each project in a month in general	Summary Report
2	Review how much time spent on each project in a month by each team member	Summary Report
3	Review how much time spent by a certain person on each project and on each task	Resources Report-Consultant Summary
4	Review the detailed report on a certain person activity	Resources Report-Detailed Time Sheet
5	Review how much time spent by various	Project Report-Project summary

	people on a selected project	
6	Review the detailed report of a selected project.	Project Report-Detailed Time Sheet
7	Review all the tasks of a certain project or of all projects with their detailed characteristics	Project Report-List of All Tasks
8	Review all the tasks of a certain project or of all projects that are due within a certain period of time	Project Report-Tasks Due in__days
9	Review all the tasks of a certain project or of all projects, the fulfillment of which is delayed	Project Report-Delayed Tasks
10	Review all projects and tasks for a selected user who created at least one project	Project Report-Projects and Tasks
11	Review how much time spent on all tasks of a certain project or of all projects and time that was supposed to be spent	Project Report-Estimated vs. Actual
12	Review all tasks to which the selected user is assigned to	Project Report-Tasks Assigned
13	Review how much time spent on bugs of each project	Bugs Report-Time Spent on Bugs
	Estimate the difference between how much time is spent and how much time is supposed to be spent on the bug	
14	Review the list of all bugs of a certain project or of all projects with their detailed characteristics	Bugs Report-List of All Bugs
15	Review how much time spent on requests of each project	Requests Report-time Spent on Requests
	Estimate the difference between how much time is spent and how much time is supposed to be spent on the request	Requests Report-time Spent on Requests
17	Review the list of all requests of a certain project or of all projects with their	Requests Report -List of All Requests

	detailed characteristics	
18	Review how much time spent by various people on the selected project	Customer Report-Project Summary
19	Review the detailed report of a selected project	Customer Report- Detailed Time Sheet
20	Review the summary billing report of a selected project	Billing Report-Project Summary
21	Review the detailed Billing Report for a selected project	Billing Report- Detailed Time Sheet

Billing Reports

Billing report is the best way to keep your projects cost under control. With its help you can easily regulate your payments and expenses, your team members' salary, calculate your project cost switching from one rate to another one and react immediately to all requirements of your customers.

The major notions of Easy Projects .NET reports are:

Default Hourly Rate is a rate according to which Users are paid. Users can have Default Hourly Rate in accordance with the role they are assigned to or their own Default Hourly Rate determined specially for them.

Project Rate is a rate according to which project cost will be calculated. There are five types of project rates:

Resource Hourly Rate: the project cost will be calculated according to the hourly rates of its members

Customer Hourly Rate: the project cost will be calculated according to the hourly rate of the customer who is assigned to this project

Task Rate: the project cost will be calculated according to the rate that will be defined for each task

Project Hourly Rate: the project cost will be calculated according to the hourly rate defined for this project

Project Fixed Cost: the project cost will be fixed to a certain amount

Note:

For Project Hourly Rate and Project Fixed Cost enter the amount!

Task rate is a rate according to which task cost will be calculated.

Hourly Rate: the task cost will be calculated according to the hourly rate defined for this task

Fixed Cost: the task cost will be fixed to a certain amount

Expenses are money spent on different project-related activities, services or goods (meals, travel tickets, etc…)

Payments are money received from your customer for the provided project-related services.

Before generating Billing Report, you should:

1. Check Default Hourly Rate for every User participating in the project.

- log into the system, choose the tab **USERS** and the sub-tab USERS
- Select User
- In the **DEFAULT HOURLY RATE** field enter his/her hourly rate according to which the salary will be calculated. If you leave this field as it is, i.e. equal to zero, then default hourly rate will be taken from Default hourly rate of the role assigned to this user.
- Press **Save and Close** button

2. Check Default Hourly Rate for every Role in case you leave Default Hourly Rate for some Users equal to zero

- log into the system, choose the tab **USERS** and the sub-tab ROLES
- Select Role
- In the **DEFAULT HOURLY RATE** field enter the hourly rate according to which the salary of all users assigned to this role will be calculated.

3. Define Project Rate according to which its cost will be calculated and enter all Expenses and Payments

- Log into the system, choose the tab **MY PROJECTS** and the sub tab PROJECTS
- Select a necessary project in the project list
- Select a necessary project rate in the **PROJECTS BILLING SETTINGS**
- Add all payments/expenses

4. Now you can choose tab Reports sub tab Billing Reports and look through the Billing reports of all projects with taxes and without