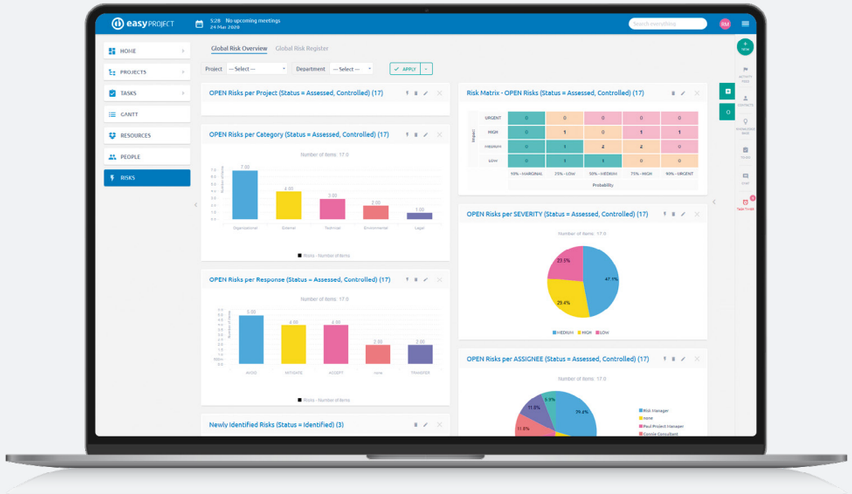
Quick & easy **PROJECT MANAGEMENT** with Easy Project

USER GUIDE

www.easyproject.com

easy PROJECT



Detailed informations, documentation and all video trainings can be found at:

www.easyproject.com and https://documentation.easyproject.com

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Welcome
to Easy Project

The handbook you are reading now is here for you and your team (colleagues) to ***make projects easy & efficient*** using Easy Project software (www.easyproject.com). It is a ***quick guide*** into basic project techniques, respective software features, roles & users types, and how to start using Easy Project quickly.

Reading it, you will learn ***how to use*** Easy Project in its ***full power*** - for waterfall or agile project with resource & finance management and other professional features.

Easy Project is ***specifically designed for*** Project & Portfolio managers, Team leaders & Scrum masters, Directors and project Team members, however it can be used by anybody who wants to manage projects in an easy, modern and systematic way.

Let´s start with basic characteristics of Easy Project.

NOTICE: All ***URLs*** in this handbook containing the text „***yourdomain***" are functional, but you need to replace „yourdomain" with your ***real domain*** in Easy Project.
Example: https://***yourdomain***.easyproject.com/... => https://***lenovo***.easyproject.com/...

PROJECTS

USERS

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CONTACTS

Projects

Chapter 1

Why Easy Project

Easy Project ***is based*** on WBS, Gantt, Agile methods, Earned Value and other best PM practices. It is extensible with modules for Resources, Finances, Help Desk and CRM.

Do you not have an Easy Project account yet?
Sign up for sign-up for ***Lite Demo*** or ***Full Demo trial***.

Lite Demo for quick & easy onboarding

- no demo data included
- just 2 predefined user types – project manager, team member
- includes features of Easy Project Platform

Full demo for detailed product exploration

- full demo data for all features
- 15 predefined user types in 4 global roles
- includes features of Easy Project Platform

Sign up free

1.1
Easy Project characteristics

Waterfall & Agile
Use all must-have project features easily in 1 application.

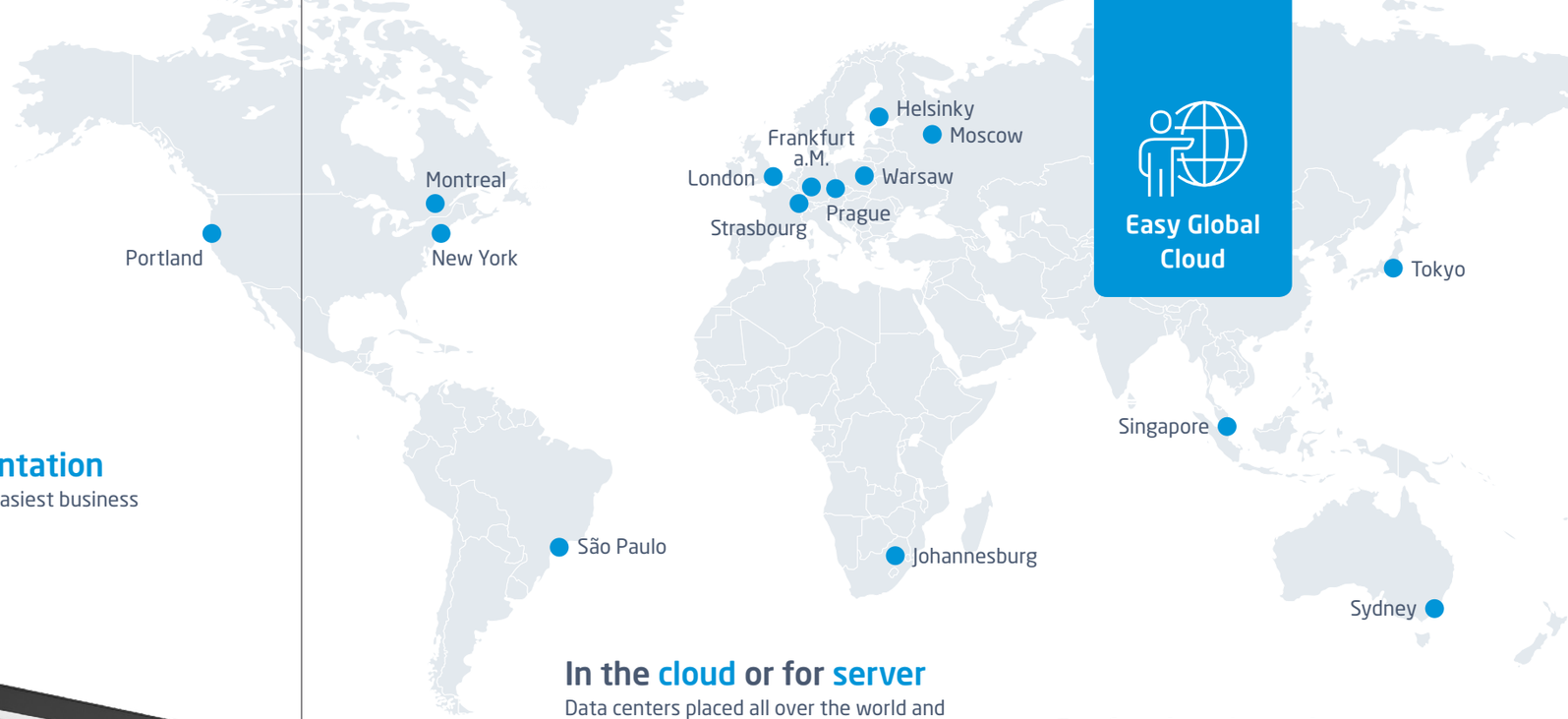
Full featured
Easy Project is full featured, ready for all businesses and industries.

PMI & IPMA compliant
Easy Project with WBS follows PMI & IPMA project management methodologies.

GDPR compliant
Easy Project is compliant with all EU standards for data protection.

VIDEO MEETINGS INTEGRATED

The easiest implementation
Predefined user types bring the easiest business implementation.



In the cloud or for server
Data centers placed all over the world and solutions for your own server guarantee first level responses anywhere.

Professional services
Implementation consultants and onboarding specialists are always ready to help you.

Infinite customization
On-board easily with predefined user types, then customize the system to perfection.

Easy Integration
There are many ready-to-use integrations using Zapier platform and powerful API.

Localised into 14 languages
Easy Project is localised into all main languages and continuously improved.

Mobile
Manage your projects & tasks easily wherever you are.

1.2
Features overview

THE BEST PM features in one application

Easy Project

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

Project Management
- WBS - Work Breakdown structure
- Gantt Chart
- Earned Value Management
- Baselines
- Reporting Tools (Graphs & Charts)

Agile - Kanban & Scrum
- Kanban Board
- Scrum
- Burndown Chart
- Backlogs

Work Management
- Task Tracking
- Workflows
- Checklists
- Calendars & Integrations
- Activity Feeds
- Online audio/video meetings
- Team chat
- Organization structure
- Business dashboards

Portfolio Management
- Portfolio Statements
- Gantt Chart
- Portfolio Trees

Time Tracking
- Time tracking and reporting
- Timesheets
- Stopwatch

Project Templates
- Production
- Strategic Projects
- Product Development
- HR Projects
- Back Office Projects

Personal Dashboards
- Dashboards for all project roles and management levels

Extensions modules

Easy Project offers ***extension*** modules
to manage your Resources, Finances,
Help Desk and CRM.

Risk Management
- Risk Lifecycle Management
- Project & global Risk Register
- Project & global Risk dashboards
- Risk Analysis
- Risk matrix

Resources
- Scheduler
- Resource Masterplan
- Resource Dashboard
- Competence Management
- Attendance Management
- Resource Manager Dashboard

Plugins
- Outlook Integration
- Knowledge Base
- Documentation - DMS system

Finances
- CBS - Cost Breakdown Structure
- Project Budgets
- Cash Flows
- Payroll and Invoicing
- Project Price Calculator and Quote
- Finance Manager Dashboard

Special Solutions
- DevOps

Help Desk
- Help Desk Dashboard
- Statistics for Help Desk
- Help Desk Manager Dashboard
- Help Desk Operator Dashboard
- Complex Help Desk Settings

CRM
- Lead - Contract Management
- CRM
- Contact Management
- Sales Manager Dashboard
- Sales Consultant Dashboard

1.3
Suitable for all industries

Easy Project covers all your needs. Ready to use project templates for all industries are included.

IT / Software

Let's go beyond Agile Management.
Software management is not manufacturing – adding more physical and human resources only makes more mess and decreases the chances of timely and within-budget delivery. Instead, manage your projects efficiently with advanced management techniques, utilize resources to the fullest and eliminate chaos.
Companies: Software development.

Industry

Increase the accuracy of budgets and timeline forecasting and keep control of scope creep.
Focus on more than one problem and get the big picture to implement an organization-wide approach to all projects.
Companies: Automotive, Foundry, Electronics.

Education

Keep control of your limited resources and promote collaboration across all departments.
Easy Project allows you to facilitate communication between staff, students, departments and geographically dispersed campuses. From collaboration to classroom booking and financial control, Easy Project is a solution to tackle all your management needs.
Companies: Universities, Schools, Training providers.

Public

Excellent project propositions, spotless implementation, and flawless realization.
Prepare documentation for the propositions of projects, including budgets and required resources. And facilitate information flow between the design & consulting engineers, stakeholders and contractors.
Companies: Goverment, Non-profit, Councils.

Services

Take advantage of available management tools & technologies to ensure a rapid increase in efficiency.
All tools in one place that you need to run your business and provide the best customer service to your clients. Manage your resources, save time and cost and increase your efficiency.
Companies: Consulting, Advertising, Marketing.

1.4
Run your projects according to IPMA & PMI or PRINCE2

Easy Project is a member of International Project Management Association, therefore you can run your project according to it´s standards.

According to Project Management Institute, the project is broken down into the five process groups agreed upon by the PMI and documented in the Guide to the Project Management Body of Knowledge (PMBOK).

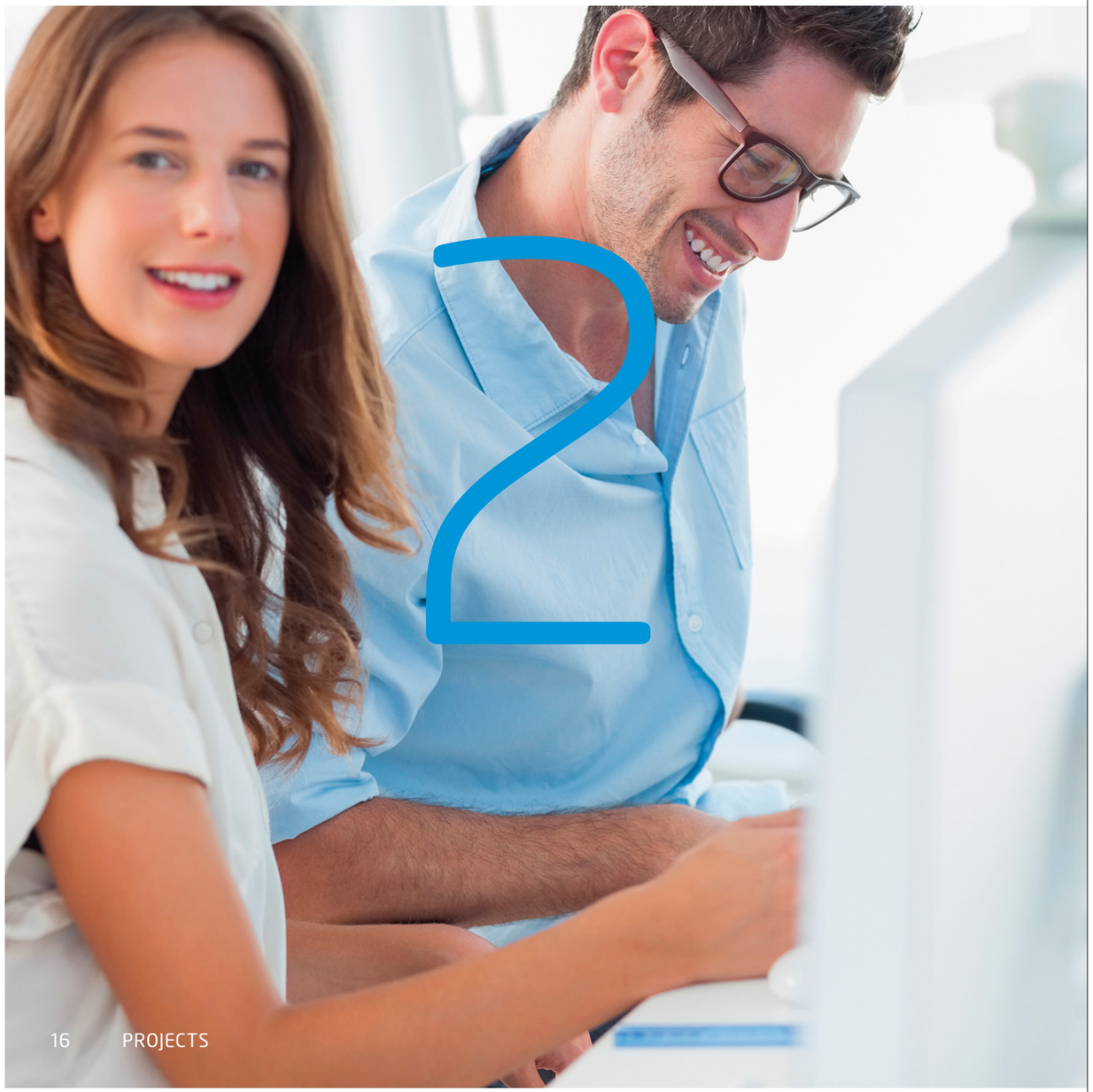
Run your project according to ***IPMA & PMI*** in Easy Project:

- Prepare and break-down your project in **WBS** (Work Breakdown Structure).
- Create a **Knowledge base** of good practises for your future projects.
- View the **critical path** of your project.
- Pre-defined **user types** of Project Manager and Project Team Members.
- Plan and manage the project as a **Project Manager**.
- Manage your **team** of project members.

In PRINCE2, a project is a temporary organization that is created for the purpose of delivering one or more business products according to an agreed Business Case.

Run your project according to ***PRINCE2*** in Easy Project:

- Start a project by appointing a Project Manager and your project team with our **Resource Management** extension module.
- Prepare a project brief and save all your project documentation directly in the **project description** or in our DMS plugin.
- Design a plan by planning tasks in **WBS** or **Gantt**.
- Identify activities and create dependencies in **Gantt**.
- **Estimate time** for each task for accurate planning.
- **Schedule** your tasks in Gantt and see if you are on track, save baselines to analyse how has the project been changing.
- **Update** your project documentation as you go and keep a track of all updates in tasks and in the project documentation.
- Create a **workflow** to set up the responsibilities and make sure the Project manager has to review every phase to evaluate the success of the project so far.
- Generate reports for **resources** and **finances** to see if you are in line with plans stated in the business case, or if something has changed.



Chapter 2

Waterfall & agile

The number of project management approaches is infinite, but basically we recognize two types – ***waterfall*** & ***agile***.

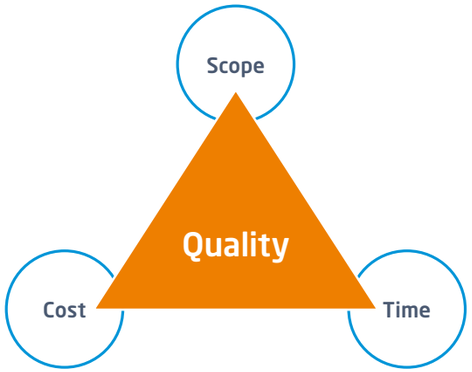
The waterfall approach is the most useful on projects where the scope is well defined and it is the key element of the project, such as building a house and planning a conference.

Agile approach should be used on projects where time is fixed, resources are a defining factor and scope is a subject of planning (prioritization), such as during SW development (sprints), publishing (release date of magazine, newspapers) or marketing content (campaign).

2.1
Waterfall approach

Scope (a project idea, vision) is defined and a plan is created ***to reach the scope***.
By ***IPMA & PMI*** (International Project Management Association and Project Management Institute) the best tool to define the project scope is ***WBS*** which is basically the project´s mind map that defines deliverables and tasks needed to deliver them.
Tasks timing is defined using ***Gantt*** - a time plan with milestones (basically deliverables due dates).
Resources to do the tasks are defined in ***Resource Master Plan*** - tasks are assigned either to people or machines and ***Budgets*** are allocated to the tasks or milestones.

The art of managing waterfall projects is in constant reviewing and change management of plans of time and resources. And in maximal utilization of available resources.



The Iron triangle scheme

The Project Management Triangle is used to analyze projects.

Principles:

- The quality of work is constrained by the project's budget, deadlines and scope (features).
- The project manager can trade between constraints.
- Changes in one constraint necessitate changes in others to compensate. Otherwise, quality will suffer.

Typical waterfall projects

- Civil engineering projects i.e. buildings
- Administrative projects i.e. audits, companies set-up

Typical waterfall companies

- Construction
- Industry

Easy Project features for waterfall projects

WBS
- Define & control scope delivery

Gantt
- Plan & control timing

Resources
- Assign & balance resources

Budgets & CBS
- Define & control budget

Project templates
- Save & improve each project as a template

Task & time tracking
- Manage task delivery & monitor spent time

Easy Project user types for waterfall projects

Project manager (management)
- Project WBS & Gantt
- Project Resource Management

Portfolio manager (management)
- Portfolio Gantt
- Resource Management

CEO (director)
- Strategic projects in WBS

CFO (director)
- Cash flow in Gantt

Team member
(executive)

2.1
Waterfall approach

How to run typical projects – which modules should I use?

This chapter will provide you with a sample project lifecycle and help you with using the right modules in different project phases.

1 **Initiating**	• **Tasks in list** This is a basic view on your tasks in the table with columns. • **WBS** In WBS you can manage hierarchies between tasks.
2 **Planning**	• **Gantt** Gantt is the best way to see when each task should start and finish. You can also draw time relations between them. • **Resource management** Provides you with a look on resources capacies to work on your project.
3 **Execution**	• **Execution & Monitoring** Project overview with customized reports. • **EVM** Earned Value Management shows you, whether your project will finish on time, without a need to reallocate extra resources.
4 **Monitoring & Controlling**	• **Kanban** Displays tasks pipeline – you immediately see in what statuses of completion your tasks are. • **Roadmap** – See your milestones and their fulfillment. • **Alerts** Receive regular reports from various viewpoints of the project. • **Time tracking**
5 **Closing & Controlling**	• **Analysis** • **Knowledge Base** Save the lessons learned from this project in your Knowledge Base and store your corporate knowledge in Easy Project. • **Graphs & Charts** Final evaluation of the key project „numbers“.

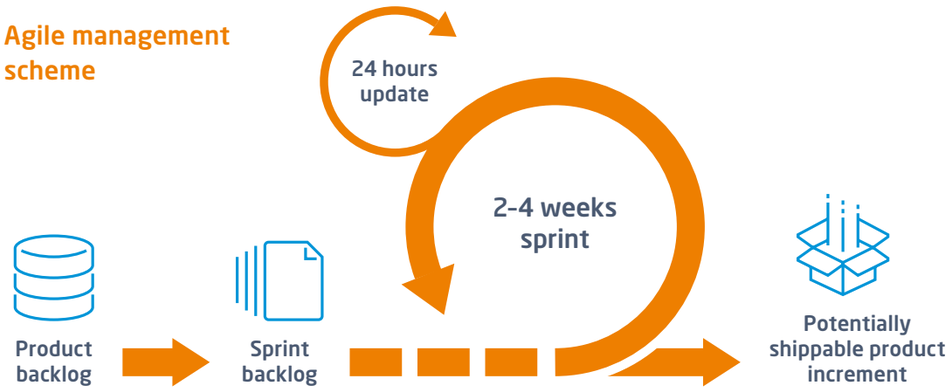
2.2
Agile approach

What is agility?

1. **The power** of moving quickly and easily; nimbleness:
2. **The ability** to think and draw conclusions quickly; intellectual acuity.

Scope ***is not*** defined exactly, some minimal ***delivery or improvement is wanted*** to deliver quickly and to get instant feedback from real usage. Make a little step forward. It is based on the Japanese art of Kaizen – ***little continuous improvements***. It was implemented into business as Kanban in Toyota and various future Agile Methodologies as ***Scrum*** or ***Scrumban***.

Agile management scheme



Typical agile projects

- SW development (sprints)
- Publishing (release date of magazine, newspapers)
- Marketing content (campaign)

Typical agile companies

- IT/Software
- Services
- Marketing

Easy Project features for agile projects

Scrum board

Kanban board

Easy Project user types for agile projects

Scrum master (management)
- Uses Scrum board in project
- Uses generic Scrum board over sprints

Executive worker (executive)
- Uses personal Kanban or Scrum board

Team leader (management)
- Uses team Kanban board
- Uses Kanban on project level

External worker (external)
- Uses personal Kanban or Scrum board

Users

Chapter 3

Easy onboarding & quick start

Gets your ready to use Easy Project in just ***3 simple steps***.

Choose your ***user type***, create your custom ***domain***, ***invite*** users and ***import*** project. Create ***new project*** in a few clicks.

3.1
Work space

MAIN MENU
Contains features specific for each user type.

DASHBOARD
Your main workplace, pre-set based on your user type, but customizable.

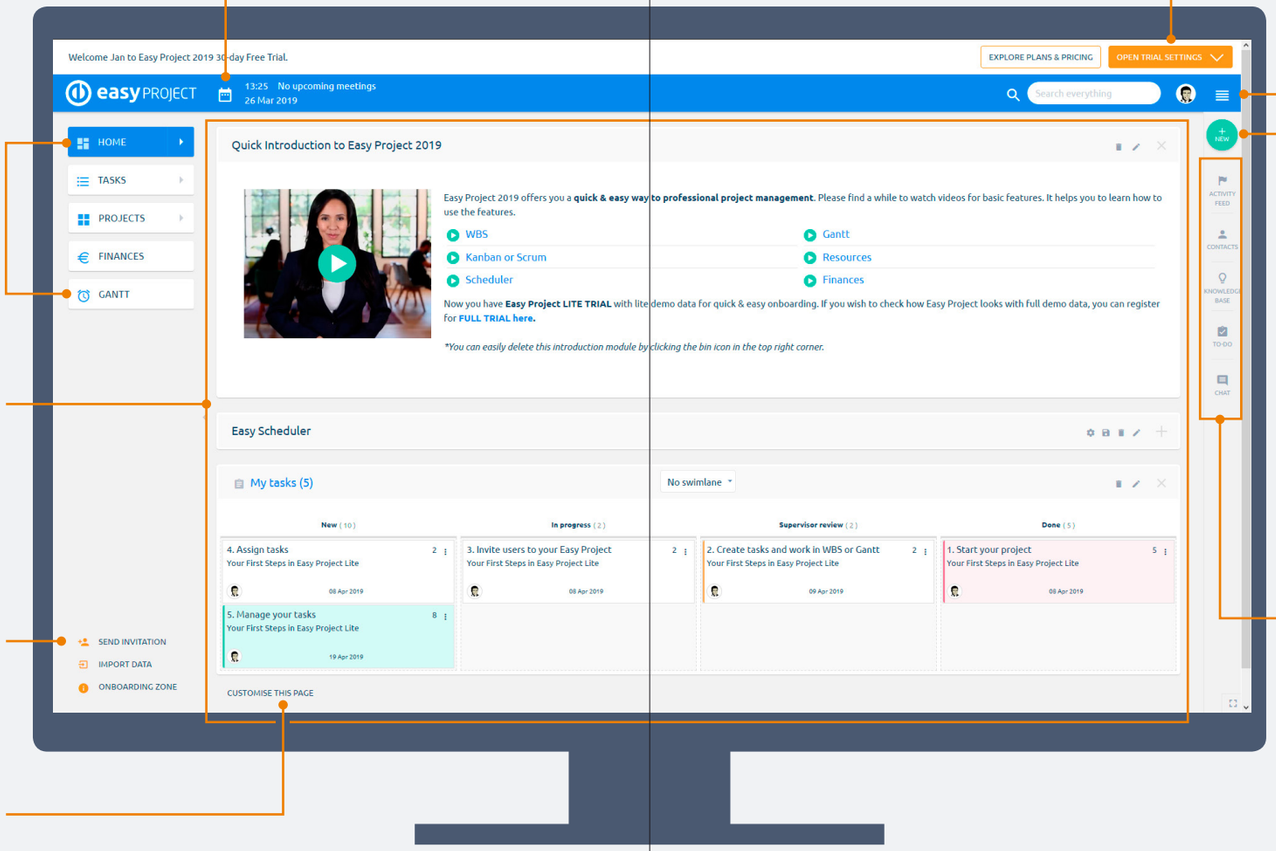
Invite users
Establish your team in a few seconds.

Import data
Integrate your previous projects.

Dashboard set-up
Customize your dashboard to meet your needs and create you own reports.

Calendar
All events available at any time. Special notes about upcoming events.

Onboarding panel
This is your guide through the first steps in Easy Project. Here you can explore all user types and dashboards, invite users or import data.



Search
Fulltext search of tasks, projects, contacts, CRM, actions and many others.

Your profile
Set up your profile and see relevant data concerning yourself.

MENU MORE
Complete offer of all features, extension modules and administration on the global/company level

New item
Here you can create all new items: a task, a project, a time log, a knowledge post, a contact and a video meeting.

QUICK ICONS
Activity feed, contacts, knowledge base, a to-do list, chat and a task timer.

3.2
Onboard easily in 3 steps

Easy Project contains set of ***demo data*** at the beginning. It allows you to see how features and dashboards look like and work in practice. Follow ***3 easy steps*** to prepare Easy Project for real use.

1 Explore features with demo data and choose the right user type for you and your colleagues

Be sure to explore all ***relevant user types*** and their dashboards and features:

DIRECTOR LEVEL	CEO, CFO, Sales Director
MANAGEMENT LEVEL	Project Manager, Portfolio Manager, Scrum Master, Team Leader, Resource Manager, Help Desk Manager
EXECUTIVE LEVEL	Team member, Sales account, Support account, Help Desk operator
EXTERNAL LEVEL	Client, External worker, Anonymous (not registered visitor)

All pre-set dashboards can be easily ***customized*** to match your exact needs.

2 Clear demo data and set up your domain

Prepare Easy Project for your own projects. Clear Easy Project demo data and set up your own domain – i.e. mycompany.easyproject.com.

Your own domain: You can for example use the name of your company, so your domain would be: nameofyourcompany.easyproject.com.
Clear demo data so you can import your own data later. The option to clear demo data is already ticked, so leave it like that. Invited users and created projects will not be deleted, neither will project templates and dashboards. Only sample projects, users, and their data will be cleared out.

3 Import projects with tasks and invite users

To import data ***choose*** what ***format*** you would like to import – Excel, Jira, MS Project or Asana. Further almost 1500 applications can be integrated through Zapier platform.

You can easily ***invite a user*** (or create a team) ***at any time*** from your dashboard, or import data or create a new project.

Welcome, You are in!

3.3
Invite users & import data

INVITE USERS

Invite your colleages into one of fifteen ***user types*** with ready to use dashboards, workflow and all settings.

Connect your user database

LDAP for users sync, ***SSO*** (OAUTH2, SAML, Kerberos) for users authentication, ***Active directory*** for user authentication.

To manage users go to **MENU MORE** > **USERS** or URL https://yourdomain.easyproject.com/users.
To manage LDAP connection of user database go to URL https://yourdomain.easyproject.com/auth_sources.

IMPORT DATA

Jira Software

Tasks, projects, users and milestones with all relations.

Project

Projects with tasks & milestones and additional attributes,

Excel

Tasks in projects with vital attributes.

3.4
Create a new project

Set-up new project or project from template, ***add*** members to project team and then ***plan*** project your favourite way:

Each new project has following modules as default: Task tracking, Time tracking, Gantt, WBS, Scrum, Kanban and Baselines.

To change default modules go to URL https://yourdomain.easyproject.com/settings?tab=projects

Time plan with Gantt

Visualize your project timeline quickly with tasks, milestones, relations. Export PDF with your logo easily.

Mind map using WBS

Create project mind map in WBS with deliverables (products) and tasks. Assign priorities, statuses and users easily. Export PDF with your logo easily.

Quick planner

Create tasks as quickly as they come to your mind.

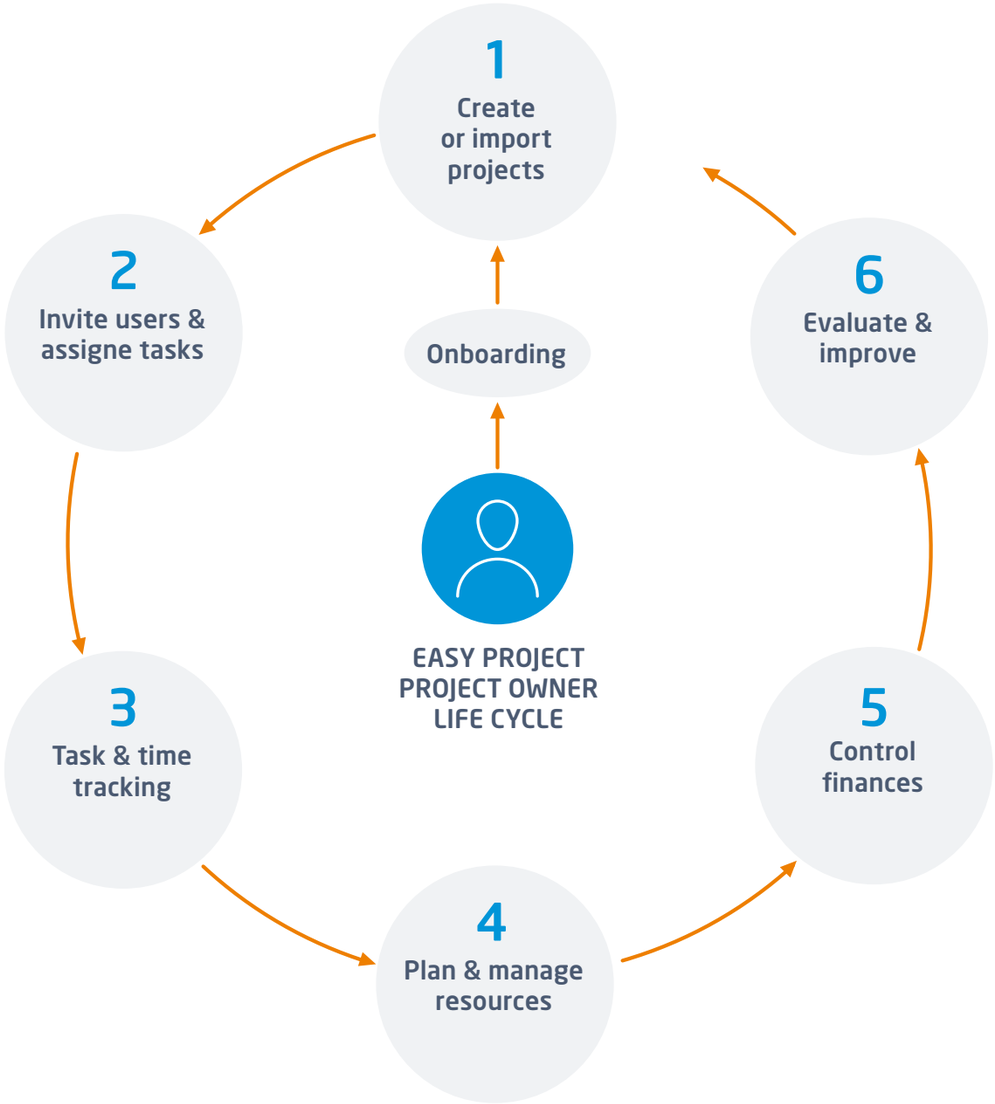
Agile planning

in ***case of scrum***, create a sprint or settle with Kanban.

3.5
Step by step to easy projects

This is a typical ***lifecycle*** of ***a project owner***.

	ONBOARDING	Sign up for free, explore demo data, dashboards & features. Choose your user type.
1	**CREATE A PROJECT**	Use the 3 steps wizard - create a project, invite project members and start your project using waterfall or agile methodologies.
2	**INVITE USERS, IMPORT DATA**	Invite up to 1000 users, import your data.
3	**TASK & TIME MANAGEMENT**	Track time spent on each task.
4	**RESOURCES**	Plan and manage your resources.
5	**FINANCES**	Control your finances, manage your project budgets and continuously evaluate earned value.
6	**ANALYSIS**	Monitor progress of your projects, evaluate and improve.



3.6
Easy Community

MENU MORE > COMMUNITY
https://community.easyproject.com/

Place for inspiration

Easy Community gathers users from all around the world in one place, perfect for sharing experience and getting advice from IT experts, admins and regular users.

Download and share project templates, dashboards and custom modifications.

Dashboards

Upload and download dashboards. Ask any questions you have regarding dashboards. Do you have any suggestions or any feedback about our dashboards? Let us know.

Project templates

Do you have a project template you would like to share with others? This is a place to upload your project or to download a project template you need! Looking for a project template and cannot find it? Create a new string in the forum.

Features & Plugins

Here you can find feature request made by our clients for their custom implementation. Vote which ones you would like to find in Easy Project. Simply rate the feature or the plugin with the stars. Feel free to ask any questions.

News / Webinars
Community also brings you the latest news from Easy Project - find dates for webinars or read about what is new in Easy Project.

We are ready to help you
Is there anything you are missing? Simply create a new topic in the respective message board, or send us a message in a Q&A message board and a member of our team will get back to you asap.

Chapter 4

Roles & user types

For easy onboarding and to ensure maximum efficiency, there are ***4 role levels*** (Director, Management, Executive and External) with ***15 predefined user types*** in Easy Project. Each user type has a ***ready to use dashboard*** with features according to particular responsibilities. Complete permissions and workflow are defined for each role level. Workflow for each level is also present.

This makes Easy Project implementation as easy as setting up just one option for each user – select their user type.

However, infinite possibilities of any custom set-up are kept, as well as dashboards customizations.

4.1
Roles levels

4 roles levels

Your position in a company or project is at the same time your role. In terms of project management, there are ***4 levels*** of management role, specific to ***objectives***, ***workflow*** and ***permissions***.

For ***administration of roles levels*** in Easy Project go to **MENU MORE** > **ADMIN** > **ROLES & PERMISSIONS** or use URL https://yourdomain.easyproject/roles

ROLES LEVELS	GOALS & ACTIONS
DIRECTOR	Manage & monitor top-level KPIs, such as project budgets, payroll, invoicing, people & sales performance. Manage strategic projects using WBS, Gantt and task tracking.
MANAGEMENT	Manage & plan projects using WBS, Gantt and Resource Management. Manage teams using Scrum & Kanban boards. Monitor projects KPIs using budgets and time reports. Manage people using task & time tracking.
EXECUTIVE	Manage assigned tasks in a list or Kanban. Log spent time on projects using task update or a calendar. Plan Attendance and monitor personal KPI.
EXTERNAL	Use the system in a limited mode for Help Desk purposes or external cooperation on tasks.

4.2
Roles, user types & permissions

Each user type comes with a ready to use dashboard and menu with main features.

Director and management level user types can customize their dashboards or change the user type on user profile.

All dashboards are saved within administration and can be modified by the administrator.

For ***user types settings*** go to
MENU MORE > **ADMIN** > **USERTYPES** or use URL
https://yourdomain.easyproject.com/easy_user_types

ROLES LEVELS	USER TYPES	PERMISSIONS
DIRECTOR	• **CEO** • **Sales Director**	SEE: All system data MANAGE: Completely own projects, users, dashboards, templates FEATURES: All system features
MANAGEMENT	• **Project Manager** • **Portfolio Manager** • **SCRUM Master** • **Team Leader** • **Resource Manager** • **Help Desk Manager**	SEE: Data from own projects (where is a member) MANAGE: Completely own projects, users, dashboards, templates FEATURES: WBS, Gantt, Scrum, Kanban, Resource management, Budgets, Finance statements, Reporting, Task tracking, Time tracking, Calendar
EXECUTIVE	• **Project Team Member** • **Help Desk Operator**	SEE: Data from own project (where is a member) MANAGE: Own tasks, own entries FEATURES: Task tracking, Time tracking, Calendars, Attendance planning, CRM, Help Desk
EXTERNAL	• **Client** • **External** • **Anonymous**	SEE: Data from own projects (where is a member) MANAGE: Manage only own tasks or help desk tickets FEATURES: Task tracking, Time tracking, New Help Desk ticket

4.3
Features for user types

DIRECTOR

CEO
- Strategic Projects in WBS, Kanban or Sprint
- Resource Management & Dashboard
- Payroll & Invoicing Reports
- Budgets Reports
- Sales Reports

USER TYPE →

CORE FEATURES →

Sales Director
- Sales Dashboard
- Contacts
- Sales Activity Race
- Overall Forecast
- Overall Sales Performance

For ***features & permission of role level*** go to **MENU MORE** > **ADMIN** > **ROLES & PERMISSIONS** or use URL https://yourdomain.easyproject.com/roles

MANAGEMENT

Project Manager
- Project WBS & Gantt
- Project Resource Management
- Project Budgets
- Time Reports & Attendance
- Invoicing & Payroll Sheets

Team Leader
- Team Kanban
- Team Resource Management
- Time Reports & Attendance
- Invoicing & Payroll Sheets
- People Dashboard

Portfolio Manager
- Portfolio Gantt
- Resource Management & Dashboard
- Project Portfolio reports/list
- Budgets overview
- Invoicing & Payroll Sheets

Resource Manager
- Resource Management & Dashboard
- Portfolio Gantt
- Budgets Overview
- Time reports & Attendance
- Invoicing & Payroll Sheets

Scrum Master
- Scrum Board
- Sprint Reports
- Project Backlogs & Sprints
- Project Budgets & Time Reports
- People Dashboard

Help Desk Manager
- Help Desk Dashboard
- Help Desk Statistics
- Kanban or Lists of Tickets
- Invoicing & Payroll Sheets
- People Dashboard

4.3
Features for user types

EXECUTIVE

Project Team Member
- Tasks in a List or Kanban
- Personal Resource Plan
- Spent Time Calendar
- Personal KPIs
- Meeting Calendar
- Attendance Calendar

Help Desk Operator
- Tickets (tasks) in List or Kanban
- Attendance Calendar
- Spent Time Calendar
- Help Desk Control Panel
- Help Desk Statistics

EXTERNAL

Client
- Create a New Help Desk Ticket
- Manage Created Ticket
- Access Knowledge Base
- Time Reports

External
- Tasks in a List or Kanban
- Spent Time Calendar
- Attendance Calendar
- Meeting Calendar

Anonymous
(If sign in to application is not required)
- Can view public projects

Software

Chapter 5

Easy Project default set-up

All the features for waterfall, agile, task tracking, time tracking, budgets and resource management ***are set-up*** in default settings.

It is easy for you to ***change*** the values and thus configure the features or do any other customizations.

5.1 EASY PROJECT
Work management

Task tracking

Open documentation

Update task attributes according to your permissions,
visualize project progress and push tasks through the workflow.
Task tracking eliminates the need for status update meetings.

Key attributes

- **UPDATE OF TASKS** according to workflow and user permissions. To learn more about Workflow, please see page 74, to learn more about Roles & Permissions, see page 39.
- **UPDATE OF TASK ATTRIBUTES** such as task type, assignee, % done, due date, priority, status, etc.
- **USE** MORE **OPTIONS** such as:

Copy	Add related task
Clone as a subtask	Add a sub task
Move	Print
Delete	Add a related CRM case
Merge	Save as a knowledge post

Task tracking options can be found under **MENU MORE** > **ADMIN** > **SETTINGS** > **TASK TRACKING**, or go to https://yourdomain.easyproject.com/settings?tab=issues

Play video tutorial

Time tracking

Time tracking and reporting is the key to efficient time management and planning. It allows employees to efficiently utilize and report their time, and managers can monitor spent time and use it as a reference for future project planning.

Logging time

- **SPENT TIME CALENDAR**
  Log time in your spent time calendar. Choose which project and task you were working on, how much time did you spend on it, and add a comment as well. Choose what type of work activity did you perform, such work, support, development etc. Use a tick box to determine whether it is a billable or non-billable activity.
- **TASK UPDATE**
  While updating a task you can log your time there as well. Go to **SPENT TIME** and add number of hours, choose the activity and use a tick box to determine whether it is a billable or non-billable activity.
- **STOP WATCH**
  You can use a stopwatch on a task to track the time you spend on the task. Simply click on **START WORKING** and when you need you can **PAUSE** or **FINISH**.

5.2 EASY PROJECT
Waterfall project management

WBS - Work Breakdown Structure

By ***IPMA & PMI***, WBS is a must have tool for ***project decomposition*** (definition of project scope). Why? Because it provides a mind-map view.

In Easy Project, ***WBS*** is one of default project modules with drag & drop feature, keyboard shortcuts and complete information about every single task. It also visualizes structure of subprojects. In Easy Project task type deliverable serves as a product.

There are a few ***basic set-ups*** and features ***for waterfall*** in Easy Project. Please think about them:

1) Task due date ***can go over*** milestone due date (default setting is NO), set up on https://yourdomain.easyproject.com/settings?tab=issues

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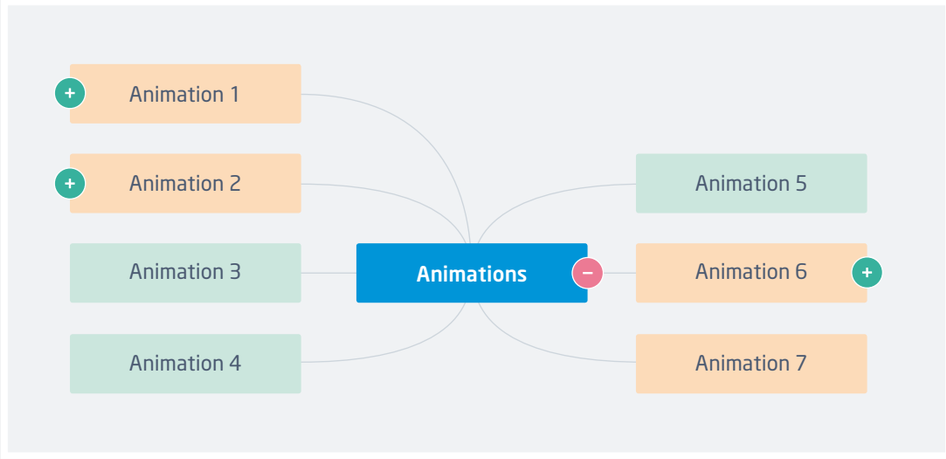
Open documentation



2) Each project decomposition can be saved as a ***project template***, go to **PROJECT SETTINGS** > **INFORMATION** > **CREATE TEMPLATE**

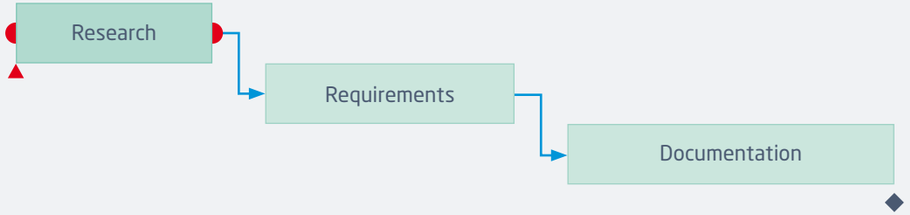
3) Project templates are ***accessible*** in **MENU MORE** > **PROJECT TEMPLATES** or URL https://yourdomain.easyproject.com/templates (management and director roles can use project templates)

5.2 EASY PROJECT
Waterfall project management

Gantt chart

Gantt with relations is basically a core of waterfall project management. Easy Project Gantt visualizes:

- Tasks
- Subtasks
- Milestones
- Relations and delays on relations
- Critical path
- Baselines
- Assigned resources (estimated time in hours)
- Assigned finances (real or planned incomes & costs)



Play video tutorial

Open documentation

Gantt chart on a global level or a project level

Gantt on a global level (Global Gantt) gives you an overview of all your projects in one chart. Gantt chart on a project level gives you an overview of tasks from one particular project. You can drag & drop tasks and create relations between tasks.

Moving a whole project in global Gantt chart will cause all associated tasks, milestones and subprojects to change their dates accordingly. Tasks are shifted to the end of the associated milestones. No cross-project relations are affected, such as precedes-follows or parent-child. Shared milestones are not affected as well, therefore, they might become invalid if they stay outside the range of the moved project.

For ***Gantt setting*** go to **MENU MORE** > **PORTFOLIO GANTT** > **SETTINGS** or URL https://yourdomain.easyproject.com/easy_settings/easy_gantt/edit

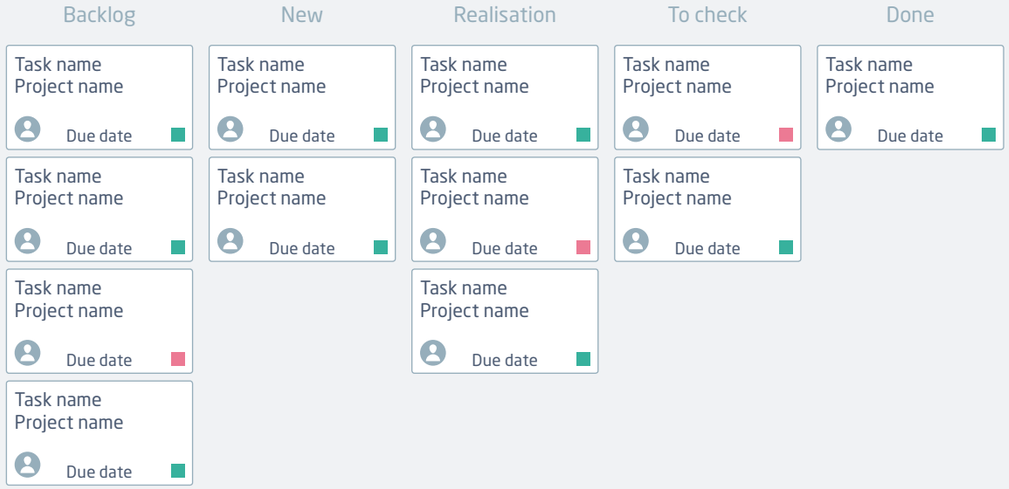
What can you set?

- Use holiday and weekends as non-working days
- Default zoom
- Critical path calculation

5.3 EASY PROJECT
Agile development

Agile Boards shows you sprint, backlog, tasks in backlog and their statuses.
The purpose of this extension is to help you with the agile management or implementations of agile methodology into your company.

Scrum boards are used for sprints which have a specific deadline or are used for a specific time period. Scrum board is a perfect tool for Scrum Masters. Kanban board shows a constant flow of tasks and it is a great tool for Team leaders.



Open documentation

Scrum board

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Create a new sprint in your Scrum board and use tasks from all projects.
Using drag and drop function, you can move tasks from Sprint backlog to the statuses as they go through the completion progress. By moving the mouse pointer over any task in the sprint, a small window with additional details about the task appears so it's not necessary to open it every time you search for some details. In the sidebar menu, you can easily create a new sprint, switch between existing sprints or use any of the sidebar options. Next to the sprint name, there are 3 icons that can be used to edit, close or delete the sprint. By clicking on task a pop-up window with task details appears.

Kanban board

Play video tutorial

In Kanban board, you can create an unlimited number of phases and link them with different task statuses. Tasks are supposed to be moved from left to right, one step after another, and fully completed by entering the last column (Done). By clicking on task a pop-up window with task details appears.

For ***Scrum board and Kanban setting*** go to **MENU MORE** > **ADMIN** > **SCRUM & KANBAN SETTING** in right menu or URL https://yourdomain.easyproject.com/easy_agile_settings?tab=scrum

What can you set?

- Assignment of tasks statuses to Scrum/Kanban columns
- Units for tasks' estimate (story points or estimated time)

5.4 EASY PROJECT
Team communication

Video and Audio conferences (Zoom)

Thanks to Zoom integration you can easily create and plan audio & video conferences directly in your Easy Project. Simply add a video meeting to the calendar, invite users to one-on-one meeting via chat or create meetings directly on task, contact or CRM case.

Key features

- Audio & Video conferences with both **MEET NOW** and planned meeting options
- Meetings on CRM cases and contacts with automatically logged sales activity using Plus button
- Conferences associated with specific Task
- **MEET NOW** option on chat

Play video tutorial

Chat

Stay in touch with your colleagues, remote teams, and work-from-home employees. Easy Project offers integrated communication tools such as instant chat, which is always available on the right sidebar. Available in all paid subscription plans.

Key features

- Accessible from the right sidebar
- User search
- User messages for quick communication
- Chat history
- Sound and visual notification

5.5 EXTENSION MODULE

Resource management

Resource Dashboard

An Essential tool for Resource Management is Resource Master Plan. It shows utilization of users or machines in time. Basic precondition is that tasks assigned to user or machines have estimated time for completion defined.

Project level of RM

Resource Management on project level allows you to manage resources of a particular project. Resource Management on project level is connected with Gantt chart, therefore you can effectively work with both modules together.

Scheduler

With Scheduler, you can plan and assign tasks for yourself or for other users directly on your calendar. You will immediately find out when a user is busy with other scheduled events such as meetings, business activities or other assigned tasks. It also shows the attendance of users, making it impossible to plan assignments during their absence.

Global level of RM

It shows users or machines allocations across all projects.

For ***setting of Resource Management*** go to **MENU MORE** > **RESOURCE MANAGEMENT** > **SETTINGS** or URL https://yourdomain.easyproject.com/easy_settings/easy_gantt_resources/edit where you can set up:

- Default allocation in hours per day (default is 8 hours per day excluding weekends)
- Type of default allocation, ie: from start date forth, from due date back, even allocation (default is from due date back)
- User or machines per day capacity

5.6 EXTENSION MODULE

Finance management

Budget is a default project module in Easy Project.
There is also finance overview of whole project portfolio (**MENU MORE** > **BUDGET**).
Easy Project budget consists of:
- Project incomes - Costs (Expenses + Personal) = Profit
- Personal costs = Time spent on project × respective hourly rate.

And there is comparison between plan and reality.

Project Budgets

Cost planning is a key to successful project management. Easy Project allows you to create project budgets and compare them to real spending. You can monitor incomes, costs payroll costs and overall project profitability.

Cash Flows

Easy Project will keep track of your project cash flows – a crucial indicator for accountants, stakeholders, and employees. Cash flow normally concentrates on cash-generating activities, which can then be easily compared to the ones planned.

Project Price Calculator and Quotation

Streamline the process of preparing a quote with Easy Project. Calculate project price based on the number of hours needed to complete it, plus any other user-defined items. Quotes can be easily styled and exported.

CBS - Cost Breakdown Structure

Manage your project finances directly in WBS (Work Breakdown Structure).

For ***Budgets settings*** go to **MENU MORE** > **ADMIN** > **BUDGET** or URL www.yourdomain.easyproject.com/easy_money_settings. Important things to set up:
- Currency (default is EUR)
- VAT yes/no + value (default is yes, 20 %)
- Hourly rates per role/user or activity

5.7 EXTENSION MODULE
Risk management

Risk Management is a mandatory process for each correctly managed project. The Risk Management tool allows to set the risk metrics through your organization, manage risks on projects and provide global risk reporting and overview for management.

Global module

The main purpose is to work with risks on the global level in the role of line manager, risk manager or Project Management Office (PMO).

Project module

The purpose of the Risk Management module on a project is to manage project risks in a controlled manner. The Risk management module comes preconfigured. But it is expected that each organization will customize its settings according to own internal risk metrics.

For ***Risk management settings*** go to **MENU MORE** > **ADMIN** > **CATEGORIES**

The ***customizable*** Risk attributes are:

Category - list of potential risk sources

Status - list of risk statuses used for risk lifecycle

Probability - definition of risk probability range used by probability & impact matrix: name, value (integer), description

Impact - definition of risk impact range used by probability & impact matrix: name, value (integer), description

Severity - definition of areas in probability & impact matrix by severity value and color. Each severity consist of name, value interval, description and color (red/orange/green/blue)

Response - list of general risk response approach options (avoid, mitigate, transfer, accept...)

5.8 EXTENSION MODULE
CRM

Easy Project's CRM solution allows you to register your leads and contacts, keep track of all communications, and to integrate them with your lead-generating solution. From the first contact to the quote and paid invoice, Easy Project CRM has everything you need.

Lead - Contract Management

With Easy CRM, you can manage all processes from a creation of a lead to an invoice. Leads can be generated from forms, imported, or created manually. With advanced filtering options, you can set up a sales pipeline and opportunities lists.

Contact Management

Well-organized contact information will save you time, prevent information loss and streamline the communication process. Your personal contacts are always available in the right sidebar and can be synchronized with other devices.

5.9 EXTENSION MODULE

Help Desk

Get an integrated Help Desk solution within your Easy Project. Tickets can be submitted through e-mail or directly into the system via the client's account and are stored in the Help Desk with defined SLA, pre-paid hours, etc. Additionally, using Action Buttons, you can easily assign tickets to workers using drag & drop.

Help Desk Dashboard

All live operations are at the Help Desk manager's fingertips. Easily assign tickets to your employees using drag & drop and Action Buttons, keep track of bug resolution and feature development, and review tasks assigned to you.

Statistics for Help Desk

Get an overview of your support service performance. Help Desk Statistics are customizable – you can view performance by users and status and compare statistics for different time periods, allowing for a cross sectional analysis of performance. You can monitor whether the SLAs are fulfilled.

5.10 EXTENSION MODULE

DevOps

DevOps Toolset for Project Management is designed for development operations of software companies and integrated with the best project management tools, such as Agile management and Gantt chart.

Diagrams

Diagrams stand for a symbolic representation of information according to a used visualization technique. Visual diagrams are important because they aid in the understanding of complex systems, which helps you easily drive projects to successful ends. Easy Project is a project management software to help you implement your diagrams and keep projects on track.

Test cases

Test cases module is a great tool for Easy Project, which helps with recurring processes and management of testing scenarios. For this reason, it is a huge help for IT companies testing their solutions as well as for other industries (very popular and useful in the automotive industry, for example). This is a complete testing management for all testing methodologies.

Software repositories

Any project can be linked to a software repository - GIT, GitLab, SVN, Mercurial. Repositories can be either global or project-related. Tasks are updated via commits to the repository with a link to the code change.

Requirements management

Requirements management is useful for technically sophisticated projects where lots of small components and details build a big and impressive product (like a car or a piece of machinery). Simply create artifacts, which represent basic attributes in the requirements' tree structure.

Chapter 6

Settings

Customize Easy Project settings for your needs accross project templates, user types, task types, worflow and many others. Tune Easy Project exactly to yourself.

6.1
Templates

Project templates

Creating project from a template

To create a project form a template, start creating a project by clicking on **+ NEW** button and then click on **PROJECT FROM A TEMPLATE** and choose a template you would like to use. Simply add a name of the new projects and edit the project information if necessary.

Saving project as a template

To save a project as a template, go to the current project you wish to save as a template and click on the **SETTINGS ICON** > **INFORMATION** > **CREATE A TEMPLATE FROM THIS PROJECT**.

Importing a project template

If you downloaded a template from community, you can simply import it in **MENU MORE** > **PROJECT TEMPLATES** by clicking on the green button **IMPORT TEMPLATE**. Choose the file from your computer and upload it to your Easy Project.

Play video tutorial

Page templates

You can manage page templates in **MENU MORE** > **PAGE TEMPLATES**, or go to https://yourdomain.easyproject.com/easy_pages.
Here you can create, edit, import, export and delete page templates.

6.1
Task types

You can use task types ***to sort*** the tasks according to the type of work they represent. They also help you to add specific information about the task based on the ***task type***. For example, if the task type is a Helpdesk Ticket, it would be handled by the Helpdesk team who would get in touch with a client and sort out their query. While the Software development team will work on task types Bug, in which case they would be fixing errors in the software.

Example of task types:

- Task
- Helpdesk ticket
- Feature (development)
- Bug
- Deliverable
- Production task

Task type settings can be found in administration, go **MENU MORE** > **ADMIN** > **TASK TYPES**. You can add or delete task types there. You can also set in what order they will appear in the task type field. Simply move them via drag & drop.

Open documentation

6.2
User types & roles

Easy Project offers ***15 predefined*** user types, for more details visit the chapter 4 Roles & user types.

User types settings can be found in **MENU MORE** > **ADMIN** > **USER TYPES**. You will see all the existing user types and a possibility to create a new user type.

Roles and permissions settings can be configured in **MENU MORE** > **ADMIN** > **ROLES AND PERMISSIONS**. Here you can see the existing roles, you can delete them, create a new one and you can also see permissions report. You may edit the name of the role and set what can the user with this role see or do. Permissions are divided into two parts – Global permissions and Project permissions. Global permissions set actions that can be done within the system, while Project permissions are actions within a project.

Global permissions		
Project	✓ Create project (L)	✓ Edit projects, where user is
	✓ Edit project template	✓ Delete project template
	✓ View easy crm country	✓ Edit easy crm country
Alerts	✓ View alerts (R)	✓ Create alerts for all users
Attachment	☐ View global attachments	

6.3
Workflow

The workflow settings can be accessed in **MENU MORE** > **ADMIN** > **WORKFLOW**.
In Status transition, you must choose a role and what changes can this role make on a task with a particular task type. Click on the green **EDIT** button and the options will reveal.
Field permissions stand for what a particular role may fill in or what it has to fill in per various task fields. Choose a role and task type for which these permissions apply.

CURRENT STATUS	NEW ALLOWED STATUS			
	New	In progress	Supervisor review	Done
New task	✓	✓	✓	
New	✓	✓	✓	
In progress	✓	✓	✓	
Supervisor review	✓	✓	✓	
Done				

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6.4
Custom fields

Custom fields can be managed in **MENU MORE** > **ADMIN** > **CUSTOM FIELDS.** You can create a custom field for every entity in the system. You can create a new custom field by clicking on **NEW CUSTOM FIELD** button in the top right corner.

Examples of custom field

Date This custom field has many uses. For example, you want to have Date of a contract in your task? Just add it in this field and you will have it in the task overview.

List You can create your own list of values which you want your users to add. Please note that a change in values of "List" type will not affect any existing records created in the past.

Lookup Allows you to look up in a specific entity. This field has a great functionality. You are able to lookup from a specific entity without the need to fill the entries. It takes data directly from the system.

Another examples of custom fields:

- Organization
- E-mail
- Phone
- Address
- City
- Zip / Postal Code
- Country

Play video tutorial

Open documentation

6.5
Categories

MENU MORE > ADMIN > CATEGORIES

Document Categories

- Create, manage and delete document categories
- Example: Project documentation / Legal & contracts
- Set who can view the documents in this category
- Set who can manage the documents in this category

Task priorities

- Create, manage and delete task priorities
- Example: Normal / High / Urgent
- Set which ones are active
- Set a default value
- Select a colour scheme

Project priorities

- Create, manage and delete project priorities
- Example: Normal / High / Strategic
- Set which ones are active
- Set a default value
- Select a colour scheme

Activities (time tracking)

- Create, manage and delete activity types
- Example: Work / Development
- Set which ones are active
- Set a default value
- Select a colour scheme
- Choose which projects to use the activity on

Milestone category

- Create, manage and delete milestone categories
- Set which ones are active
- Set a default value

Sales activity category

- Create, manage and delete activity categories
- Example: Call / E-mail / Meeting
- Set which ones are active
- Set a default value
- Select an icon

Custom field groups

- Create, manage and delete custom field groups
- Set which ones are active
- Set a default value

Chapter 7

Integrations

Running your business with several apps definitely needs an integration. Here you find ***the best tools*** for synchronization or ***migrating data*** from third-party systems into your Easy Project.

Easy Project is ready to be integrated with more than ***1500*** most used apps all of kinds – project managements, communications, socials, databases and many more.

We are here to help you implement API integrations or you can do self-implementation thanks to our public templates.

7.1
Zapier integration

Zapier is a platform connecting APIs of the ***1500 most used apps***. Therefore it allows transfering data from one app to another. Set up easily automated workflow called Zap made of a trigger and an action. When Zap is running and the trigger event happens in one app, Zapier automatically makes the action event in another app.

Self-integration with templates

Easy Project is Zapier public app so you are able to set-up Zap integrations by yourself. Just sign up on Zapier and create your own Zaps or use our Zap templates.

More information about Easy Project triggers and actions and more Zaps templates find on our integrations page ***https://zapier.com/apps/easy-project/integrations***.

Zapier integration benefits

Thanks to Zapier integration you are able to connect your apps with Easy Project without further development, everything is connected and handled by Zapier. Of course, automation of boring and manual workflows between apps help your team save time and make their work more effective.

zapier + 1500 apps

7.2
Rest API

Easy Project has a complete API (application programming interface) that enables easy integration with other systems. Rest API provides the following operations: read, create, edit, delete.

Rest API operates with the following Easy Project entities. For example:

- tasks
- projects
- project templates
- time entries
- users
- user groups
- incomes and expenses
- attendance entries
- contacts
- CRM cases

Complete interactive documentation of Easy Project Rest API can be found at ***https://easyproject.docs.apiary.io/#***

Thanks to API integration you can do advanced project management in Easy Project and then easily forward those tasks to your development team that uses JIRA or create leads in your Easy Project CRM module from the Mautic marketing automation tool. Use all your favorite tools and always have them synchronized with custom Rest API integration.

Examples of apps that can be integrated with Rest API:

REDMINE mautic GitHub leadfeeder

7.3
Standardized imports

Import projects and tasks from MS Excel, Jira, MS Project or Asana. Just click on IMPORT DATA

Microsoft Excel

Import your data into Easy Project directly from a Microsoft Excel file. You can easily migrate entire projects, tasks and sub-tasks in one step, including automatic mapping migrated data to existing attributes in Easy Project.
Help: https://yourdomain.easyproject.com/easy_imports/help/excel.

Jira

Jira importer is a very useful tool when you are going to convert any data from your existing Jira project system into Easy Project. Just export the relevant data from Jira and then follow our simple instructions for importing the file.
Help: https://yourdomain.easyproject.com/easy_imports/help/jira.

Microsoft Project

If you used Microsoft Project before going to Easy Project, you probably have a lot of data in need of transfer. You can do it very easily! This tool allows importing projects and tasks created in Microsoft Project into our application.
Help: https://yourdomain.easyproject.com/easy_imports/help/ms_project.

Asana

If you want to migrate your projects and tasks from Asana to Easy Project, there is nothing easier than use this importer. First, export the selected data from Asana and then upload the exported data file to our application. Follow a few simple import instructions. Help: https://yourdomain.easyproject.com/easy_imports/help/asana.

7.4
Other imports

MENU MORE > ADMIN > EASY IMPORTS > CUSTOM IMPORTS

The XML/CSV importer enables you to convert any existing data in a compatible format into Easy Project. Import all existing entities without limitation, migrated data are manually mapped to existing attributes in Easy Project.

Notes

8

Contacts

Client zone

https://www.easyproject.com/client-zone

Looking to purchase some extension modules and plugins?
Go to your Client zone from web or your EP instance.

In Client zone you can:

- Update your billing information
- Upgrade your subscription plan
- Purchase extension modules and plugins
- Manage your invoices
- Create and view Help Desk Tickets
- Manage your zoom subscription for audio/video meetings

Training center

www.easyproject.com/services/training-center

Take your first steps towards easier project management.
Learn about basic Easy Project features and how to apply them.

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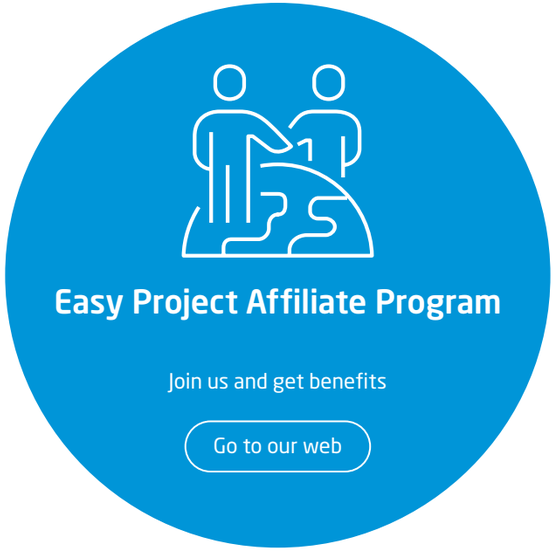

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