easy PROJECT

Quick & easy

PROJECT MANAGEMENT

Implementation Guide

Set up the Easy Project on your own

www.easyproject.com

Welcome to Easy Project

Easy Project 2019 is a professional project management software for you, your team, and the whole company. It is based on the best PM practices like WBS, Gantt chart, Scrum, Kanban. It is extensible with modules for Resources, Finances, Help Desk, Business Intelligence, and DevOps toolset.

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

PLATFORM PLAN is not covered in this document, because it is strongly recommended to purchase this plan with implementation.

How to work with this guide

Blue text	Links to settings (for site administrators) Add the relative link to the client's URL: ***mycompany.easyproject.com/settings***
Green text	Labels and checkbox names in application

Documentation

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

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

Content

BUSINESS PLAN

ESSENTIAL PLAN

1 Initial settings (mandatory)

1.1 Before you start configuration:

- Finish the Onboarding zone
- Make sure you have at least one user with admin rights and know its credentials

1.2 General settings **/settings**

1.3 **/settings?tab=general: Application title**

- Decide order of search suggester in **Enable search suggester**
- Decide what is searchable by **Default fulltext search types**

1.4 **/settings?tab=display: Default language**

1.5 **/settings?tab=projects: Default enabled modules for new projects; Default task types for new projects;** Decide if you want to set **project start / due date** manually or calculate from tasks

1.6 **/settings?tab=notifications:** select **Notification email address (FROM)**

1.7 **/settings?tab=attachments:** select **Maximum attachment size**

2 User settings (mandatory)

2.1 Working time calendar **/easy_user_working_time_calendars**

- Select one of predefined as default (will be used for each new user)
- Alternatively, add a **New calendar** and specify its characteristics. You can import holidays from **Import holidays from ICalendar**

2.2 Check predefined **User types** and **Roles**

Decide what Roles and User types you need (think about User Types as layout of workspace): https://www.easyproject.com/doc/Easy_Project_-_User-types-and-features.pdf

- Delete unnecessary user types **/easy_user_types**
  - If you create a new User type, we recommend to fill in a **Default role** and **Default template for my page**. If you add a user to a project team, default role will be used. You can adjust it later.
- Delete unnecessary roles at /roles. Settings of Roles and permissions will be explained later.

2.3 User homepages **/easy_page_templates?page_id=6**

- You can adjust existing homepage templates that are used when creating a new user
- We recommend to do it before creating users

ESSENTIALS / BUSINESS

2.4 Decide about users' creation

- New users – LDAP / Active Directory
  - Set up new connection on **/auth_sources/new**
  - For each user, decide what is their **Authentication Method**- either a) Manual (login and password from Easy Project's users or b) LDAP'S authentication name
- New users – csv import
  - Use this .xls file https://es.easyproject.com/s/AQZCXC7
  - Import users using Advanced importer **/easy_entity_imports**
- New users manually **/users**
  - When creating new users, you must fill in: **Login, First name, Last name, Email, User type**
  - We recommend to fill in also **Time zone** and **Email notifications**

2.5 Groups (voluntary) **/groups**

- Groups will make it easier when adding users to projects
- Create a **Group** first, then use tab **Users** in order to add members

2.6 Global roles in Easy Project

- Global roles can make onboarding easier for you – just by selecting a user type
  - Homepage and default role are associated with a user type
- Make sure you configured **Default template for my page** and **Default role** in settings of each **User type**
- Go to **/users**, select a user, edit the profile and change a User type
  - Consider changing the **My page template (Dashboard)** by using checkbox **Apply default template for selected user type**

3 Work management (mandatory)

3.1 General task behaviour is at **/settings?tab=issues**. The most important information will be highlighted later.

3.2 Task types /trackers

- * Task types are different activities within your project, that you may want to differentiate from others. Also, you can associate task types with different permissions, statuses and custom fields.
- Make sure you have at least 1 Task type in the application
- Default status must be selected
- Turn on/off some standard fields
- Activate or deactivate a task type for some specific projects

3.3 Task statuses /issue_statuses

- Make sure you have at least 1 task status in the application
- Consider selecting some of your task statuses marked as **Task closed** (usually, only open status are filtered in task reports)

3.4 Workflow /workflows

- Workflow defines how different roles can change task statuses
- Also, you can have a different workflow for each Task type
- We recommend to select one role and one task type and check/unchecked statuses you want to see
- In rows you can see the name of current task status
- In columns you can see other available statuses
- It is fine to focus just on a first table (you do not have to set up transitions when user is the author or assignee)

ESSENTIALS / BUSINESS

3.5 Roles and permissions /roles

- Permissions are divided in two categories: Global and Project. Project permissions tackle scenarios within one project (create a new task, write a comment to a project history). Global permissions manage scenarios beyond one project (using chat, creating a new project).
- Always make sure to assign a User to a Project with a corresponding role
- When user has more than 1 role on a project, the higher permissions are granted (according to hierarchy of roles)
- Make sure you have at least 1 role in the application
- Set up initial project structure
- Tasks cannot exist outside of a project
- Having at least one project (we recommend to calling it for example “Administration”) is necessary
- Always make sure to assign a User to a Project with a corresponding role (otherwise they will not be able to do anything, even after logging in, since no global permissions are applied)

4 Classic project management

4.1 Consider checking **Allow to set task due date after milestone date** (milestone will be moved accordingly) **/settings?tab=issues**

4.2 Parent tasks attributes – **Parent tasks attributes Start date / Due date /settings?tab=issues**

- Start date / Due date is usually Calculated from subtasks
- Priority is in most cases Independent of subtasks
- % Done mostly make sense to be Calculated from subtasks

4.3 Other useful task attributes **/settings?tab=issues**

- Choose the appropriate way for the option Calculate the task done ratio by
- Set 100 % done on closed tasks
- Ignore workflow for administrators is better to leave unchecked especially when you configure the workflow under admin account

4.4 When you create a new project

- Add users with a corresponding role assigned (you can later change it in **Settings – Members**)
- Activate project modules (Gantt, WBS, Kanban, Documents) you want to work with (in **Setting – Modules**)

4.5 Project template **/templates**

- In **Settings – Information** of each project you can **Create template from this project**

4.6 In order for user to see the project and receive tasks, user must be assigned to a project in some role (with exception of Public projects and Administrators)

- Public project can be seen by all the users (they do not have to be member) – see Settings in each project

ESSENTIALS / BUSINESS

5 Agile Management

5.1 Default Scrum / Kanban Settings

- Visit administration and go to Default Scrum / Kanban Settings **/easy_agile_settings**
- Establish your columns – **Progress state**
- Define which tasks each column should contain (**contains theses task statuses**)
- Set up task status changes when moving from one column to another – **Task status**
- **Others & Additional options** – how should one task look like

5.2 Turn on Scrum / Kanban Module on your existing project

5.3 In Scrum, you need to set up a Sprint and assign tasks to the sprint from backlog

6 Time tracking

6.1 Global time tracking settings **/settings?tab=timeentries**

- Decide if you need to approve time entries
- For better time control consider selecting When logging time, task must be selected

6.2 **Activities (Spent time) /enumerations**

- Make sure you have at least 1 activity (spent time) in the application
- Set up different activities and turn them on for your existing projects
- Or turn on spent time on the project (Settings – Modules)

6.3 Task timer configuration **/easy_issue_timers/settings**

- **Activate** Task timer
- Define the changes that will be made when task timer starts **(Start timer)**
- Define the default changes made when task timer stops **(Stop timer)**

7 Portfolio management

7.1 Global Gantt /easy_gantt

- Access **Global Gantt** from more menu in top right corner
- Make changes to **Global Gantt** in the settings **/easy_settings/easy_gantt/edit**

8 Project controlling & reporting

8.1 Dashboards – Global reporting

- Templates for global reporting pages are at **/easy_pages/built_in and /easy_pages**
- When changing, click on **Module layout**, scroll down to **Customize this page** and make changes
- Do not forget to **Apply template**
- Note, that if you **Apply template**, current layout of homepage will be lost (unless you choose only to add tabs)

8.2 Project overview

- Templates for **Project overview pages** are here **/easy_page_templates?page_id=1**
- The process to adjust them and apply is the same

8.3 Personal homepages

- Templates for Personal homepages **(My page)** are here **/easy_page_templates?page_id=6**
- The process to adjust them and apply is the same

9 Resource Management

9.1 Resource Management /easy_gantt_resources

- Access **Resource Management** from more menu in top-right corner
- Make changes to **Resource management** in the settings **/easy_settings/easy_gantt_resources/edit.** Here, set up working time (Hour limit per day) for each user, group respectively
- In order for resource management to work properly, make sure tasks Start date, Due date and Estimated time are set
- Use Tools to get the most of Resource Management
- Please, define **Roles and Permissions** for **Resource Management** (see details above)

9.2 Resource Dashboard /easy_resource_dashboard

- Access **Resource Dashboard** from more menu in top-right corner
- Have a global resources overview with prepared dashboards
- To alter **Resource Dashboard** filters/layout scroll down to **Customize this page** and make changes

10 Scheduler

10.1 Scheduler – accessible via homepage module

- To access the **Scheduler**, click on the Calendar icon in the top-left corner and/or add **Scheduler** to your homepage (on the bottom of your homepage click **Customize this page** and add **Easy Scheduler**)
- Change the displayed **period** and specify **Users** whose calendar (agenda) you want to see
- In **Scheduler** setting (gear in the Schedulers top-right corner) define Scheduler type, Display range, define filters or connect to External calendar
- Click **iCal URL for events export** to share your calendar (see details below)
- With double-click into the **Scheduler**, you can plan Meeting, Task, Attendance, Sales activity or Allocation

11 Attendance Management

11.1 Attendance Management **/easy_attendances/settings**

- Here, you will define country-specified working calendars and attendance categories
- **Working calendar** – define default one; add, alter or delete Calendars you need/don't need
- In **Attendance categories** define working categories (e.g. work, home office) and non-working categories (e.g. vacation, sick)
- In **Attendance settings** define **vacation**, **sick** days limit and your office **IP range**
- Please, define **Roles and Permissions** for **Attendance** (see details above)

11.2 Attendance Dashboard **/easy_attendances/overview**

- Access **Attendance Dashboard** from more menu in top right corner (**Attendance**)
- Have a quick and on-one-page report with all user's attendance
- To alter **Attendance Dashboard** filters/layout scroll down to **Customize this page** and make changes

12 Outlook & calendars integration

12.1 Integrate your EP calendars

- To share your EP calendar, in **Scheduler**, click **iCal URL for events export**
- Define which data (Meeting, Attendance, Allocation, Sales activities) from **Scheduler** you want to integrate and obtain URL/QR code
- Share your data with any calendar you want
- To integrate **Scheduler** with Outlook, please download CalDAV for Outlook plugin first and follow the instruction

13 Finance Management

13.1 Global Budget setting **/easy_money_settings**

- In **Role hierarchy** define ordering for budget calculation based on **User/Activity/User**
- In **Rates by role/Activity/user** define required rates
- To define more attributes for **Budget** (e.g. VAT, External/Internal calculation, whether to calculate budget on Task, etc.), go to **Other setting** tab
- Please, define **Roles and Permissions** for **Budget management** (see details above)

13.2 Budget on project

- To work with Budget on a Project, **Budget** plugin must be activated. When **Budget** is not activated, go to project **Setting gear** – **Modules** and check **Budgets** (**/projects/NumberOfTheProject/settings/modules**).
- **Budget setting** on each project may differ to **Global budget setting**
- To alter project budget setting click **Budget setting** in **Budget** tab on a certain project
- To allow adding budgets on tasks, **Use budget on tasks** check box must be checked
- To display more details, click the desired **value** (for example, click planned incomes values to obtain list of all planed values in certain project)

13.3 Adding Income and Expense

- To add Planned or Real Income or Expense click **New Income/Expense** green tab in the right part of the page
- In the right up corner, define **Currency** you want data to be displayed
- In the **Budget overview**, green values indicate positive values, red values indicate negative values

14 Projects Budgets with CBS

14.1 Cost break Down Structure (**CBS**) on **WBS**

- To display **CBS**, go to any project where **Budget** is activated (if not activated, see instructions above)
- Go to project **WBS** and click **Budget** icon (top right corner) to display **CBS**
- In **Show** column, choose what budget data you want to display, and define **Currency**
- **Use budget on tasks** must be turned on, in order for them to appear

15 Financial Statements

15.1 Budget statement **/easy_money**

- Access **Budget statement dashboard** from more menu in top right corner
- Have a quick and on-one-page report of all budget across the application
- To alter **Attendance statement dashboard** filters/layout scroll down to **Customize this page** and make changes
- From here, **Portfolio overview, Cash-flow, Budgets on tasks** and **More** are accessible. To go there, please use buttons placed in the right up corner.

15.2 Payroll and invoicing sheets **/budgetsheet/overview**

- Access **Payroll and invoicing sheets** from more menu in top right corner
- Have a quick and on-one-page report of all payrolls and invoices across the application, see billable and non-billable values and many more
- To alter **Payroll and invoicing sheets dashboard** filters/layout scroll down to **Customize this page** and make changes
- From here, you can access **Payroll and Invoicing** sheet and **Rates by user** (use buttons in the right part of the page)

16 Cash-flow

16.1 Cash/flow **/easy_money_cash_flow**

- In this report, specified budget entities (e.g. Planned Income, Planned Outcome, etc.) for specified projects are displayed
- In the up-left corner, define **Period** for data displaying (Day > Year)
- With accessing **More** menu in the right part of the page, access **Planned/Real Expenses/ Incomes overview, Travel cost overview** and **Travel expenses**

17 Risk management

17.1 Risk management is both project and global module

- If you have recently created your application as trial, Risk Management should be already preinstalled. If you purchase Risk plugin separately or upgrade to Business plan, then Risk management has to be installed before the first use. Go to Risk plugin page in Administration > Plugins (**/rys_management/easy_risk_management/edit**) and click Install. This will preinstall the plugin to default settings.

17.2 Risk management configuration

- In order to use Risk management, make sure you activate this module on at least one project. Go to any project > Settings > Modules. Select **Risks**. (**/projects/105/settings/modules**)
- Check your permissions for risk management in **/roles**. Permissions can be found in both Global and Project sections.
- If you need to customize Risk settings, navigate to Admininstation > Categories (**/enumerations**) and check your **Risk status**, **Risk response**, **Risk category**, **Risk impact**, **Risk probablity** and **Risk severity**.
  - **Risk severity** = **Impact** × **Probability**
  - **Risk severity** range From-To is used in the **Risk matrix**
- There are dashboards that Easy prepared for you. If you make any changes in **Risk categories**, make sure you adjust your dashboard configuration as well.

Inline manuals

- Inline manuals are here to help you at the beginning of using Easy Project
- They are part of each new trial
- Look for them at the bottom left corner - **ONBOARDING ZONE**
- There are three sections:

  Introduction - helping you with first steps
  Set-up guides - helping you when changing configuration in Administration
  How to use - for other related topics

- For our clients, we turn inline manuals off.
  Anyone can choose to keep them as long as needed.

Contacts

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.

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 invoicesm create and view Help desk tickets, manage your Zoom subscription for audio/video meetings.

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