User Guide

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Welcome to the Project Management platform. This guide walks you through everything you need to know as a team member to log your time, manage your tasks, and stay on top of your work.

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1. Getting Started

How to Log In

1. Open the application URL in your browser.
2. Enter your **email** and **password**.
3. Click **Login**.

If you have forgotten your password, click **Forgot Your Password?** on the login page. Enter your email address, then choose a new password on the next screen and log in with it. No administrator involvement is required.

Navigating the App

After logging in, you will see the **Dashboard**. The left sidebar has your main navigation:

- **Dashboard** — Your overview page
- **My Timesheet** — Log and view your time entries

- **My Tasks** — View and manage your assigned tasks
- **My Projects** — See the projects you are part of

2. Dashboard

The Dashboard gives you a quick overview of your current work.

My Tasks Widget

Shows your top 5 active tasks sorted by due date with status counts (To Do, In Progress, Review).

My Timesheet Widget

Shows your current week's time summary: total hours logged, target hours, progress percentage, and a daily breakdown (Monday to Sunday).

Upcoming Deadlines Widget

Lists tasks with due dates coming up in the next 7 days and any overdue tasks. If you reported a ticket and the assignee sent it to you for review, and you haven’t approved it or requested changes within 24 hours, it also appears in your dashboard’s Overdue tasks list, labelled “Awaiting your review” until you act.

Upcoming Holidays Widget

Lists upcoming organisation-wide holidays so you can plan ahead. This widget is shown to every user.

Team Availability Widget

Shows which team members are on vacation, sick leave, business leave, or otherwise unavailable in the current and upcoming 7 days.

3. Profile

How to Edit Your Profile

1. Click your name in the top-right corner of the page.
2. Select **Profile**.
3. Update your first name, last name, or phone number.
4. Click **Update Profile** to save.

How to Set or Change Your Profile Picture

1. Go to your Profile page.
2. In the **Profile Picture** section, click **Choose image** and pick a JPG, PNG, or WebP file up to 2 MB.
3. Review the preview, then click **Save**.
4. To remove your picture, click **Remove picture** and confirm.

Your picture replaces the initials in the header user menu and anywhere your avatar appears in the app. Square images render best.

How to Change Your Password

1. Go to your Profile page.
2. In the **Change Password** section, enter your current password.
3. Enter your new password and confirm it.
4. Click **Update Password**.

How to Reset a Forgotten Password

Use this if you cannot log in. If you can already log in and just want to update your password, use How to Change Your Password above.

1. On the login page, click **Forgot Your Password?**
2. Enter your email address and click **Continue**.
3. On the next screen, enter your new password and confirm it. Minimum 8 characters with uppercase, lowercase, number, and symbol.
4. Click **Reset Password**.
5. You'll be returned to the login page. Sign in with your email and the new password.

The reset is self-service — no administrator approval is required. Inactive accounts cannot be reset; contact your administrator if your account has been deactivated.

How to Manage Your Skills

1. Go to your Profile page.
2. In the **Skills** section, enter your skills separated by commas.
3. Click **Update Skills**. You can add up to 20 skills, each up to 50 characters.

How to Set Availability / Vacation

1. Go to your Profile page.
2. In the **My Availability** section, fill in the **Add new availability entry** panel.
3. Select the type: Vacation, Sick Leave, Business Leave, or Other.
4. Set the start date, end date, and **hours of leave** — the number of hours the leave consumes that day (set to your full day for a full day off).
5. Click **Add entry**.

More than one leave on the same day. Leaves of different types **stack** on a day (e.g. 3h sick + 2h business = 5h leave, 3h still available), each kept as its own editable entry. The **total leave on any day can’t exceed your working day**; an over-cap save is rejected, naming the day, and nothing is stored.

Business Leave covers company-directed time away from project work (e.g. a client workshop or off-site). Enter the *hours of leave* taken that day (set to the full day for a full day off); it reduces your available hours in the Member Utilization report.

Leave from BambooHR. If your company connects BambooHR, your **approved time off is added here automatically** — you don’t need to re-enter it. Every leave row now shows a small **source tag**: entries you typed yourself are tagged **PM App**, and entries synced from BambooHR are tagged **BambooHR**. BambooHR entries are **read-only** in this app (no delete button), because they’re managed in BambooHR; change the leave in BambooHR and the update flows back within an hour. You can still add manual **PM App** entries for anything not in BambooHR. If BambooHR later reports leave for a day your manual entry already covered, **your manual entry wins** — BambooHR fills only the future days you haven't already marked, and never changes, trims, or removes anything you entered yourself. When you're off for a full day, an "on leave" marker also appears on your avatar — on your profile and on meeting cards for the dates you're away — and on the Dashboard's Team Availability card.

4. Timesheet

Location: My Work > My Timesheet

In the **Month** view, each non-working day is **named** in its cell — the holiday, or the leave type (e.g. "Sick leave") — not just shaded a colour, so you can tell at a glance what each highlighted day is. The leave type and holiday name are visible to everyone — the same leave already appears on the Dashboard's Team Availability card.

How to Log Time

1. Go to **My Timesheet**.
2. Select a **Project** from the dropdown.
3. Select a **Task** from the tasks dropdown. A task is **required** — time can no longer be logged at the project level; if none is assigned to you, create one (see below).
4. Click on the day cell where you want to log time.
5. Enter the duration (in hours, e.g., 2.5).
6. Optionally add a description.
7. Choose whether the time is billable or not.
8. Click **Save**.

A task is required for every time entry. Project-level (task-less) logging has been removed so every logged hour records what work it was for.

How to Log Time from a Project Page

Open a project from **My Projects** and click the **Log time** button in the page header — the Quick Log dialog opens with that project preselected. The **Task** dropdown lists only your **active** tasks on that project; tasks marked **Done** or **Cancelled** are not shown ("Only active tasks are listed."). Use **Create new task** if you have no active task there yet.

How to Quick-Create a Task

If the task does not exist yet — or you have no task assigned on the project — click the **Quick Task** button next to the task dropdown and enter a task name. This works for **any project member on any project type** (you need not be a manager); the task is created in the project, **assigned to you**, and immediately available. Its Billable flag defaults to Yes for Client (external) projects and No for Internal and Business Development projects; edit the task to change it.

Editing / Deleting Your Time Entries

You can edit or delete any of your own time entries at any time. The only exception is an **invoiced** entry, which is permanently locked and cannot be modified.

Closed Task Restriction

You cannot log time against a task that has been marked **Done** or **Cancelled**. No one can log time against a closed task directly. Ask your project manager to reopen it first. Admins and project managers can reopen the task and log time in one step (the entry is saved against the reopened task).

Duration Format

Enter duration as **H:MM** (e.g., `1:30` for one hour thirty minutes) or as a **decimal** (e.g., `1.5` for the same). Time is displayed as `Xh Ymin` (e.g., `1h 30min`). A live preview shows the resolved duration as you type.

Both formats are accepted everywhere you log or estimate time — the **Estimated Time** field on a task, the timesheet **Quick Log**, and the task **Log Time** form. As you type, a live preview shows the exact result (e.g. `0:30 → = 30min`), so half-hours are never misread as a decimal.

Holiday & leave days

Days that are organisation holidays, or days you have booked as vacation, sick leave, business leave, or other unavailability, are shaded on your timesheet and labelled with the reason — across the week, day, month and calendar views. Holidays use a yellow shade; vacation is blue, sick leave is coral, business leave is amber, and other unavailability is grey. Weekends and holidays are never treated as vacation or sick leave, so a holiday or a weekend that falls inside a booked leave range still shows as the holiday or weekend, not as leave. If you have only part of a day off, the day still shows the leave label along with the hours you can still log.

A gentle reminder when you log on a day off. In the Quick-Log dialog, if you pick a date that is a **full day of leave** or an **organisation holiday**, a soft notice appears (e.g. “You’re on leave on 25 Jun — log hours anyway?”). It never blocks you — the entry still saves normally. Part-day availability does **not** trigger the leave reminder. The reminder works wherever the Quick-Log dialog opens — from **My Timesheet** and from the **Log time** button on a project page.

How capacity, leave, and utilization relate

The platform measures your week against two different numbers depending on which page you're looking at.

- On **My Timesheet**, the Week Progress card shows your **contracted hours** for the week — by default, **8 hours per day** across the working days that fall inside the week. A vacation day, sick-leave day, business-leave day, or organisation holiday **reduces** this number for that day. If your whole week is on leave but you still logged time, the card swaps the “% complete” line for a “Worked through leave” pill so the hours don’t get lost.
- On the **Utilization report** (visible to managers and admins), each member is measured against a **productive target of 6 hours per day** across the same working days, reduced by the same leave rules. This is the figure team productivity is judged against. Logging more than the target reads as Over-utilized; less reads as Under-utilized; matching reads as Optimal.
- **Working on a leave day or holiday reads as “Over-utilized”.** If you log time (or have work allocated) on a day where your capacity is **zero** — a full leave day or an organisation holiday — the Utilization and Workload screens show an explicit **“Over-utilized”** label instead of a misleading **0%**. Display only: your logged hours still count in full towards the task, the project time report, billable totals, and P&L. It stays separate from **“Overloaded”** (more than 100% of a normal, non-zero capacity day).

You may notice your **My Timesheet** card says “40 hours” for a no-leave week while the **Utilization report** says “30 hours” for the same week. That is by design — they are different lenses on the same week.

If you work part-time (contracted below 40 h/week), the **My Timesheet** card scales to your contract (e.g., 20 h/week shows 4 h/day), but the **Utilization report** still measures you against the org-wide 6 h/day productive target. This means a part-time team member showing 67% utilization is on-target for their contract.

5. My Tasks

Location: My Work > My Tasks

Strictly personal: My Tasks lists only tasks assigned to you, on every view, for every role — managers and admins see their own assigned tasks here too. On a task you share with others, only your avatar is shown.

Task Views

Three different views are available. **Table is the default the first time you visit** — it's the fastest-loading view at any project size. After that, My Tasks **remembers the view and filters you last used** and reopens there, so clicking **Back to My Tasks** after logging time on a task returns you to the same Board/List with the same filters.

- **Table View** *(default the first time you visit)* — A list with columns for name, project, status, priority, due date. Supports search and filters. It always opens showing the 10 most recently created tasks, newest first. You can page through older tasks or pick a larger page size (10 → 25 → 50 → 100), but the Table does not remember the page you were on — returning to the Table re-loads the default 10-newest list (your view choice and filters are still remembered).
- **Board View** — Kanban-style cards grouped by task list columns. Each card shows its **project name on a small line just above the task title** (so cards with similar names are easy to tell apart, while the title stays the most prominent text), a bold title, a short description preview, pastel chips for the first label and the priority, stacked assignee initials (up to 3 + a "+N" chip when there are more), and a bottom row with the time you have logged so far (a clock with your running total, shown only once you have logged time against the task), comment / attachment counts, and the due date.
- **Grouped View** — Tasks grouped by project.

When you **create a task** and pick its project (or create it from inside a project), the **Assignees** list shows that project's team members first under a **"Project Members"** heading, with everyone else under "Other Users". If you change the project, the list re-groups and anyone you already ticked stays selected.

Hiding Empty Columns on the Board

On Board (Kanban) view, columns with no matching cards are hidden by default. The rule also applies after filters and search: a column whose visible task count drops to zero hides automatically, and reappears as soon as a task moves into it. Use the **Show empty columns** switch in the page header to render every column regardless of card count — the switch is off by default and your choice is remembered across reloads and devices.

Active Task Default + "Show completed" Toggle

By default, My Tasks shows only active tasks (To Do, In Progress, Review) on every view. Tasks marked Done or Cancelled are hidden so the page loads fast and stays focused on what's still in flight. Tickets you have marked Resolved also drop out of the default list (see *Resolved Tickets and My Tasks* below).

To include completed work, flip the **Show completed** switch in the page toolbar. Your choice is saved per-user and applies across all three views and across both My Tasks and the Management Tasks page. Picking specific statuses in the **Status** filter overrides the toggle (the toggle dims while the filter is set); your selection round-trips through the URL as `?status=…` for bookmarkable filtered views.

Resolved Tickets and My Tasks

When you mark a ticket **Resolved**, it leaves your **My Tasks** list automatically — your work is done and the ticket is waiting for the reporter to close it (or it auto-closes after 14 days). To review tickets you have resolved that are awaiting close, open the **Status** filter on My Tasks and select **Resolved**.

How the List View Loads (Fast)

The **List** view opens instantly even when you belong to many projects. Every project starts **collapsed**: switching to List loads each project's task-list headers with accurate open/total counts in a single request, but not the tasks inside. Click a project header (or Expand All) to load its tasks on demand; collapsing and re-expanding never reloads them. The open/total badges stay accurate under filters — a Status filter narrows the tasks shown inside an expanded project without changing the badges.

Your **most recently opened** project sorts to the top of the List and is the one project expanded automatically, so you can resume where you left off; with no recent project, every project stays collapsed in the default order. On a single project's Tasks tab, only the **active view loads** — List, Column, and Kanban each load the first time you open them.

On narrow screens, each task row collapses to just its name. Tap a task row to expand it and see the full name, assignees, labels, status, priority, time, due date, and actions — so nothing is cut off on small or low-width displays.

Task Quick Preview

Click a task tile on the Kanban board to open a centered quick-preview popup styled like the Workload Detail dialog. Body: description / sub-tasks / comments / attachments on the left; status / priority / labels / assignees / dates / hours on the right. Footer: primary *View Full Details* → button (and *Edit Task* when permitted). Press Escape or click outside to close.

Click-to-Edit Cells

In Table View, the status, priority, due date, label, project, list, and assignee cells are click-to-edit. Click a value, change it in the popover, and the row updates inline.

Row Actions Menu

Each row ends with a three-dots icon. Click it to open a compact menu with view, duplicate, **Mark as complete / Mark as incomplete**, and delete actions. There is no separate ✓ button on the row — the affordance lives inside the menu.

Opening Items from a List

Click anywhere on a row to open its full detail page. To peek without leaving the list, click the eye icon for a quick summary — a popup shows the key details without a full-page navigation. Use the ↗ icon to open the detail page in a new tab instead. This works on the Projects and Tasks lists.

Hover Quick Actions

Hovering a task row (or tabbing in with the keyboard) reveals two icons next to the three-dots: **eye** (opens a quick-summary popup without leaving the list) and **Open in new tab** (↗ — opens the full detail page in a new browser tab). Touch devices show these icons always-on.

Global Search

The search box in the top bar jumps you to anything from any page. Type at least 2 letters for live results grouped into Projects, Tasks, and People. Find projects by name or code and tasks by name or number (type #42 to jump to task 42). Use the up/down arrows and Enter to open a result, or click it. You only see projects and tasks you have access to, and search also finds completed and closed items the filtered lists hide.

Searching a Table

Every table's search lives in the toolbar as a magnifying-glass icon button. Click the icon to slide out the input, type to filter live, and the input collapses back to icon-only when you blur with no text. Press Escape while typing to clear and collapse in one step. Your last query is remembered for the rest of your browser session.

Done / Cancelled Tasks

When you explicitly include Done or Cancelled in the status filter, those rows render with a strikethrough on the task name and slightly muted body text.

Assignee Avatars & Due Date Layout

Assignees show as small initialled avatar circles with hover tooltips; tasks with more than two assignees show two avatars + a "+N" overflow chip. The Due Date column stacks the absolute date over a colour-coded relative line ("in 3d", "Today" amber, "5d overdue" red).

How to Update Task Status

1. Find the task in any view.
2. Click the status toggle/button on the task.
3. Select the new status (To Do, In Progress, Review, Done).

> On **client projects**, marking a task as "Done" creates a closure request instead of closing it directly. Your project manager, an admin, or a Manager+ user with access to the project will review and approve the closure.

Note: Once a task is marked Done or Cancelled, regular users and assignees cannot edit it. Admins, project managers, and Manager+ users with project access can still make edits on closed tasks.

How to Add Comments

Open the task detail view, scroll to the Comments section, type your comment and click Post.

Mentions

Type `@` in any task or ticket comment to open a picker of teammates you can notify. Arrow keys move the highlight; Enter picks. When you mention someone, they get a bell notification with a link straight to your comment. You can't mention yourself — and people who aren't on the project (or, for tickets, aren't the reporter or a watcher) won't appear in the picker.

How to Upload Attachments

Open the task detail view, scroll to the Attachments section, click Upload and select a file.

If a task has been split across several assignees, its main task shows the combined estimated and logged time rolled up from all the splits, with a per-assignee breakdown. This is a read-only summary and does not affect any reports.

6. My Projects

Location: My Work > My Projects

The page opens in **Cards** view by default, giving an at-a-glance summary of each project. Switch views using the three buttons in the top-right of the toolbar:

- **Cards** *(default for new users)* — a grid showing each project's status, type, code, name, lead, timeline / start / client, a progress bar, an avatar stack, and an open-tasks (or sub-projects) count.
- **Table** — sortable, searchable, paginated. Click a column header to re-sort; click any row to open the project.
- **Kanban** — projects grouped by status. Project managers can drag a card between columns to update its status.

Favourite projects: Click the star on any project (Cards, Kanban, or Table) to favourite it. Favourites pin to the top of every view, and the ★ Favourites toggle shows only your starred projects. Favourites are private to each user. Turning on the Favourites filter is remembered — My Projects will keep showing only your favourites every time you return, until you turn the filter off.

Task visibility on the project detail page: When you open a project from My Projects, you see only the tasks assigned to you (with only your avatar on shared tasks) — for everyone, including project managers and admins. The overdue count (Overdue KPI tile, Tasks-tab badge, and the overdue alert) is scoped the same way — it counts only your own overdue tasks. To browse all tasks in a project (and the project-wide overdue count), use the admin / management project view; a shared read-only link shows the full list, and a specific task is always openable by its own link.

Project details: The collapsible Project details card on the project page shows the project's key facts (status, priority, dates, company, project manager) and its **Labels** as colour chips.

Your last-used view is remembered in your browser. The older "List" view has been replaced by Table and is migrated automatically on first visit.

Sort: By default, My Projects is sorted by your most recent activity (your task updates / comments / time entries on tasks within the project), with the project's last update timestamp as a fallback. Click any column header to override. Completed and cancelled projects are hidden by default.

Empty state: If you are not yet assigned to any projects, the page shows a compact card with a folder icon. As soon as you are added to a project, the regular views replace it.

7. Notifications

Click the **bell icon** in the top navigation bar to see your most recent unread notifications. For a full historical view, click **View all notifications** at the bottom of the dropdown, or visit the **Notifications** page directly.

Notification	What It Means
Task Assignment	You have been assigned to a new task.
Task Closure Approved	Your closure request was approved.
Due Date Reminder	A task assigned to you is due tomorrow.
Workload Alert	Your workload has exceeded capacity.
Approval Reviewed	An approval request was approved or declined.

The Notifications Page

The full notifications page lists every notification you have received, newest first, paginated 20 per page. Use the filter tabs at the top to narrow the view:

- **All** — every notification, read or unread.

- **Unread** — only notifications you have not read yet.
- **Read** — only notifications you have already read.

Each row shows a relative timestamp (e.g. "2h ago"), the message describing what happened, and a link to the relevant task, project, or approval request. Unread rows are visually highlighted.

Per-Notification Actions

Each row has two actions: **Mark as read** clears the unread highlight without navigating away (shown only on unread rows); **Delete** removes the notification permanently (confirmation prompt first). Clicking the notification's message text takes you to the linked item.

Bulk Actions

Select multiple notifications with the row checkboxes (or the **Select all on this page** header checkbox) to reveal the bulk-action toolbar. From there you can **Mark as read** or **Delete** the entire selection at once, or **Clear selection** to start over.

Mark Everything Read

The **Mark all as read** button at the top right of the page clears every unread notification in one click. The button is disabled when you have no unread notifications.

7a. Raise a Ticket

Location: the floating **Raise a Ticket** button in the bottom-right corner of every page, **My Tickets** in the sidebar, or the **Raise a Ticket** button at the top of the Help page.

Raise a ticket to report a bug, request a feature, suggest an improvement, or ask a question. The team triages it, assigns someone, and keeps you in the loop until it's resolved.

- Pick the **Application** the ticket is about and confirm the **Page URL** (pre-filled with where you came from).
- Choose a **Type**: Bug, Feature Request, Improvement, or Question. A **Bug** also requires a **Severity**.
- Add a **Title** and a **Description**.
- Optionally attach screenshots or files, and add **watchers** — colleagues who should follow the ticket.

The **My Tickets** page has three tabs: **Raised** (tickets you reported), **Watching** (tickets you follow), and **Assigned** (tickets assigned to you). The Assigned tab shows your active tickets by default — use the **Filter** button to also see closed ones. After triage a ticket becomes a task with a shared conversation thread, and moves through **New → In Progress → Review → Approved → Resolved → Closed**. You can attach images/screenshots to any message; they appear inline and open larger on click. You can edit your own messages — click the pencil icon to change the text or swap attachments; no “edited” marker is shown, and editing is blocked once the ticket is closed. You can also delete your own messages (with a confirmation prompt). Admins can remove any message but cannot edit messages they did not write. Automated status-change notes can’t be deleted or edited. Time logged against the ticket is the same time recorded on the task.

My Tickets shows a colour-coded status chip for each row — New, To Do, Triaged, In Progress, In Review, Approved, Resolved, Closed, and Cancelled each have their own colour.

Filtering your tickets: every tab (Raised, Watching, Assigned) has a **Filter** panel with two multiselect filters — **Application** (pick one or more apps, or leave unselected for all) and **Status** (pick one or more states: New, To Do, Triaged, In Progress, In Review, Resolved, Closed, Cancelled — or leave unselected for all). Your selections are **remembered per tab** across visits. Active filters appear as removable chips; use *Clear all* to reset a tab’s filters.

Paste a screenshot from your clipboard (Ctrl/Cmd+V) anywhere in the conversation box or the Raise-a-Ticket form to attach it instantly. Pasted and picked images show as removable thumbnails before posting (up to 5 images, 5 MB each).

Who can triage your ticket? Triage and reassignment can be performed by Super Admin, Admin, and Project Manager roles (Spec 057 widened triage + reassign to include Project Managers so tickets don't bottleneck on Admin). Manager+ and standard users cannot triage or reassign.

The ticket page shows a **Status & next step** box with a five-stage lifecycle track (In Progress → In Review → Approved → Resolved → Closed) and a plain-language line telling you what to do or whose turn it is. As the assignee you click **Send for Review** when the work is done, then **Mark Resolved** once the reporter approves. As the reporter you click **Approve** or **Request Changes** during review, then **Close** (or **Re-open**) once the ticket is resolved.

When the assignee finishes work they click **Send for Review**. You click **Approve** (fix looks good) or **Request Changes** (sends it back to In Progress). Once you approve, the ticket moves to **Approved** — its own stage on the board. The assignee then clicks **Mark Resolved**; you can still click **Request Changes** from Approved if something needs revisiting. The note the assignee leaves when marking Resolved is shown to you as the resolution summary. You (or the assignee) then click **Close**, or you click **Re-open** if the issue has come back; admins and project managers can also close directly at any active stage. Each action has an optional comment box. If you take no action for 14 days after the ticket is Resolved, it closes automatically.

Watchers (CC'd colleagues) can read the conversation and post replies, but have no lifecycle action buttons — they cannot change the ticket's status (Send for Review, Mark Resolved, Close, or Re-open). Only the reporter, the assignee, and admins / project managers can act on the ticket's status.

Every ticket has an **Activity** tab (next to Resolution) — a read-only log showing who did what and when: work started, time logged, sent for review, approved, fields changed (assignee, dates, priority, title), resolved, and closed. The list scrolls inside the tab. Anyone who can see the ticket can see the timeline.

Resolving a ticket — what the assignee needs to provide

When you click **Mark Resolved**, the system checks that the underlying task has a **start date**, a **due date**, and that you have **logged your own time** against it. If anything is missing, a short dialog appears and asks for exactly those details. Resolving saves everything in one step. This ensures your work shows up correctly in workload and P&L reports.

Re-raising a closed ticket

If a ticket has been **Closed or Cancelled** and the same issue comes back, the **reporter** can click **“Reopen as new ticket”** on the closed ticket’s page. This creates a brand-new ticket pre-filled with the original details. The new ticket lands in **New** status and will be triaged like any other ticket. The original closed ticket and its task are left exactly as they were — the history is preserved.

7b. Meetings

Location: My Work > Meetings

Schedule a meeting, invite colleagues, collect their RSVPs, and record who actually turned up — all without leaving the app. Every meeting gets a key like **MTG-001** and starts in status **Scheduled**.

Creating a Meeting

1. Open **Meetings** under My Work and click **New Meeting** (or the **+** button).

2. Fill in the **Title** and an **Agenda** (multi-line text that also accepts **images** and **@-mentions**; see *Agenda images & @-mentions* below).
3. Choose **Where** from one picker: **Online**, or **Meeting Room** (book a meeting room — see *Booking a room*).
4. Set the **Start** and **End** date-time — they pre-fill to the next full hour and one hour later; the end must be at least **5 minutes after** the start.
5. Optionally add the meeting to a project — the field reads **Add to a Project** (default **Select a project**), any type — and add **one or more invitees** (at least one required).

Two optional checkboxes: **Notify me when invitees respond** (a bell each time someone responds) and **Also create as a task** (needs a linked project — see below).

Agenda images & @-mentions

The **Agenda** is more than plain text. You can **paste** a screenshot or **choose** image files into it — **PNG, JPG, GIF, WEBP**, up to **5 images** and **5 MB each**. Thumbnails appear immediately with a remove control before you save, and while editing you can remove images saved earlier. You can also **@-mention** people: type **@** and a search box lists **any active user** (not just your invitees); pick a name and it's inserted. On save, each **newly** mentioned person gets an in-app **notification** (“you were mentioned in a meeting agenda”) and shows as a highlighted **chip** on the meeting page; re-saving an unchanged mention won't notify again, and you're never notified for mentioning yourself.

On the meeting page, anyone who can view the meeting sees the images as **thumbnails**; clicking one opens a **full-size preview** with the filename and a **Download** link (close with Escape or by clicking outside). Images are permission-controlled — only people who can view the meeting can open them — and the agenda text is always shown safely.

Booking a room

Choosing **Meeting Room** reveals a dropdown of bookable rooms; picking one **reserves it for the meeting's time** and mirrors the room name into the location. Rooms can't be double-booked — a clashing booking is **blocked** with a message naming the clash, so pick another room or switch to **Online**. Back-to-back bookings are fine. Reschedule, cancel, complete, delete, or switch away from the room and the hold is released for everyone else.

Recurring room bookings

For a meeting that repeats, flip **Repeat this meeting** on the create form, choose **Every day / week / month** and an **Until** date, and book the whole run at once. A series is limited to **30 occurrences**: the form shows a **live count** as you set the frequency and end date and won't let you save over 30, naming the count, the limit, and the fix (an earlier end date, or a less-frequent cadence). When a room is picked for a recurring series it is **booked for the first occurrence only**; every other date is created as **"No Room"** (an amber, pending, in-person state), leaving the room free for others on those dates. The remaining dates get a room **one at a time** from the **Occurrences** section on the detail page (or from the **Meeting Calendar**), and an editor can set/change the room on **any** upcoming date — near or far. There is **no window and no "Room opens" wait**: a date six months out is just as assignable as tomorrow. A room already taken for that slot is refused on the spot, so nothing is ever double-booked. Because only the first date books a room, there is **no** multi-date "room clash — book anyway?" consent step. The foldable **Occurrences** section (collapsed by default) lists each upcoming date's room (or "No Room"), lets an editor set/change the room on any upcoming date, and has a **"Select all"** master checkbox at the top for bulk delete. Editing or cancelling always asks whether to change **this occurrence only** or **the whole series** (a whole-series edit shares time, title, and the standing roster — **rooms stay per-date**, they are never re-booked); if a new series time collides with a date's held room, **only that one date's room is released** (with a prompt to pick a new room for the freed date) while the rest of the edit still applies; frequency and the date range are fixed once booked. A meeting in a series wears a **Recurring** badge on its cards and detail header, and the detail's **Details** panel states the schedule in plain language (e.g. "*Repeats monthly · next 29th Jul*

2026 · until 29th Sep 2026"); one-off meetings show no badge. The same Occurrences panel also lets an editor **add one extra invitee to a single date** (that per-date guest **stays on that date even when the whole series is later edited** — a series roster change adds or removes standing invitees without disturbing a per-date guest) and **delete occurrences** (this one, **all upcoming**, or a **hand-picked set** of specific dates, or all via **"Select all"**) — deletion removes only dates that haven't happened yet, **past meetings are always kept**. Meetings are also **colour-coded by place**: a **place chip** reads aqua **Online**, violet **In person**, or amber **No Room** on the card, the detail header, and dashboard invitations, while a recurring meeting adds the green **Recurring** badge (the same green as the recurring-task label). On the **room calendar**, room bookings show in deep violet and a recurring series carries a green stripe.

My Meetings list

A row of **room cards** sits above the list, one per active room, each showing name, location, and live availability (**Free now**, **Free · next at** a time, or **In use until** a time). **Click a room card** to open its **availability calendar** (Month / Week / Day); clicking a free slot there starts a new meeting prefilled with that room and time. Each booked block shows **who booked it** and, for a recurring series, a **"Recurring · N dates"** line (visible to everyone), while the title and link stay gated to people who may view the meeting. The Meetings list shows meetings you **organize** or are **assigned to**. **A recurring series shows as a single card** (not one per date) — one row linking to the next upcoming occurrence with an **“N upcoming in this series”** hint, counted **once** by the summary tiles. Filter by status, project, and date. Four summary tiles count your **Scheduled**, **Awaiting your RSVP**, **Completed**, and **Cancelled** meetings (the Awaiting tile lights up only when you owe a reply), and each card carries a coloured **status rail** (blue = Scheduled, green = Completed, coral = Cancelled) with cancelled meetings dimmed. Click any summary tile to jump to that subset; the **Status** and **Project** filters accept multiple selections, and the date filter is a range. When the Project list is long, the Project filter has a **search box** — type to narrow it.

Invitations & responses

When you're invited you get an in-app **bell notification** and a **Meeting invitations** card on your Dashboard, and — for **Online** meetings — a real **Outlook/Teams calendar invite**. **Responses now happen in Outlook/Teams, not in the app:** you accept, mark tentative, or decline from the Microsoft 365 calendar invite (there are no in-app Accept/Maybe/Decline buttons), and your reply is pulled back into the app automatically (usually within the hour), so the meeting's **Invitees** card and the organizer's **response tally** reflect who's coming. The **Awaiting your RSVP** tile and **Reminders** lines still flag invites Outlook shows you haven't answered. When you create a meeting you're counted as an **Accepted** attendee by default — you're hosting it — so you never get an invitation prompt or a reminder to respond to your own meeting.

Meeting lifecycle

- **Mark Completed** — the meeting has happened; responses freeze.
- **Cancel** — the meeting is called off; records are kept and all invitees are notified.
- **Re-open** — bring a Completed or Cancelled meeting back to **Scheduled**, choosing to notify all invitees or a selected subset.

On the meeting's detail page these stay tidy: **Edit** is the filled button in the header with **Copy link** beside it, while **Mark Completed**, **Cancel**, and **Delete** live together in the **More** menu (the three-dots button).

Attendance tracking (who attended and for how many minutes) is coming in a later phase, where it will fill in automatically from the Microsoft Teams attendance report.

Connecting your Microsoft 365 account

Teams/Outlook sync is **per person**: go to **Profile → Microsoft 365** and click **Connect Microsoft 365**, sign in once, and the **Online** meetings you organize will sync to your own Outlook/Teams calendar. Because the event is made on **your real**

mailbox, invites and join links work even if your app login email isn't a licensed company mailbox. Click **Disconnect** to stop syncing new meetings (existing calendar events stay); if your connection lapses the app asks you to reconnect.

Teams calendar sync (Online meetings)

Once you've connected your account and you save an **Online** meeting you organize, the app creates a real Teams calendar event on **your** Outlook/Teams calendar and invites each internal attendee (a recurring series syncs as **one** recurring event). A **Join Teams meeting** button then appears on the meeting page. If you haven't connected, the meeting saves but stays *not synced* with a nudge to connect; if Microsoft can't be reached it saves and shows a **Teams sync failed** badge, and the next edit retries. **Meeting Room (in-person) bookings also sync** — the event shows the room as its location and keeps a Teams join link so people can join online; only a placeless meeting (neither Online nor a room) creates no event. External (non-user) email guests and Teams attendance auto-fill are not part of the current phase.

Responses flow back from Outlook automatically. When an invitee accepts, marks tentative, or declines from their calendar invite, that response is pulled into the app — usually within the hour — and shown on the meeting's **Invitees** card.

Need it sooner? Use “Sync responses”. On a synced meeting’s detail page, the organizer (and managers/admins) sees a **Sync responses** button that pulls everyone’s latest Outlook/Teams replies into the app immediately, instead of waiting for the hourly cycle. It works even after the meeting has ended (the automatic hourly sync only covers upcoming meetings).

Meeting shows “Teams sync failed”? Use “Retry Teams sync”. The organizer (and managers/admins) sees a **Retry Teams sync** button on a failed online meeting; it re-creates the Teams event and pulls responses into the Invitees card. If it keeps failing, the **organizer hasn't connected their Microsoft 365 account** (Profile → Microsoft 365) or their connection has lapsed.

Also create as a task

Tick **Also create as a task** (with a linked project) and the app creates a task on that project. A meeting with **2 or more invitees** gets one **“App Meeting”**-labelled split sub-task per invitee, so each person logs their own time — the hours roll up **without double-counting**. A single-invitee meeting becomes one normal task. For a **recurring** meeting the tasks aren't created up front — the app creates **each occurrence's task on the morning of that date** (one per occurrence, split per invitee), so a long series never spawns hundreds of tasks at once. On the meeting's linked-task card, each split row is **clickable** and opens that split task.

Share by link

Every meeting has a copyable **share link**. A colleague who isn't an invitee sees a **read-only** view (a “shared link (read-only)” banner, no edit controls, no financial figures); someone who already has access sees the full view. Either way the read-only link shows the same **agenda images** and **@-mention chips** as the full page. A deleted meeting's link shows a friendly “This meeting was deleted” message.

Editing & deleting

Organizers (and Super Admin / Admin / Project Manager) can edit; delete is organizer + Super Admin / Admin only. You **can't remove the last invitee** — cancel or delete the meeting instead.

> If a linked-task split already has logged time, deleting the meeting or removing that invitee is**blocked** with a message naming the person. Remove the time first, or cancel the meeting instead — your invoiced/logged hours are never destroyed.

6a. Sharing a link to a task or project

Every task and project detail page has a **Copy link** button. Click it to copy a shareable link to your clipboard, then paste it anywhere — a chat message, an email, a document.

- **Login required.** The link requires a valid login; nothing is visible to signed-out visitors.
- **Read-only for non-members.** If the recipient is not a member of that project or task, they can open the page and see the details but cannot edit, comment, log time, or duplicate anything. A banner notes they are viewing via a shared link (read-only).
- **Smart routing.** The link opens the right view automatically for whoever clicks it.
- **Access upgrades automatically.** If that person is later added to the project, the same link gives them full access — nothing needs to be re-sent.

8. Tips & FAQ

What happens if I log time past midnight?

The system has logic to automatically split a time entry that spans midnight into two separate entries — one for each day. However, the current timesheet interface accepts a duration only (not a start and end time), so in normal use this split is not triggered. If you need entries on two days, log them separately.

Can I log time on a holiday or weekend?

Yes — holidays and weekends no longer block time logging. If you need to record hours worked on a public holiday, you can log them normally; a notice on the Quick-Log dialog shows the holiday name for reference. Holidays are shown for reference and still reduce your capacity in workload/utilization reports. Upcoming holidays appear in the Upcoming holidays card on your dashboard. Time logged before a date became a holiday is unchanged.

What are recurring tasks?

Some tasks repeat automatically on a schedule (daily, weekly, bi-weekly, monthly, or yearly). Recurring tasks are set up by managers or administrators from the admin area — they can't be created from the Create Task form. New instances appear in your My Tasks list automatically.

How the template model works. When a manager or administrator sets up a recurring task, it becomes a hidden *template* — it does not appear in task lists, the board, or table view. Only the project's **Recurring** tab shows templates. The moment the template is saved, the system immediately generates the **first occurrence** as a normal task you can work on and log time against. All logged hours count in reports; the template itself carries no hours. If a template is edited, only future occurrences are affected — tasks already generated are never changed.

Weekend and holiday skipping (daily tasks only). Daily recurring tasks are not created on weekends (Saturday or Sunday) or company holidays — if the next date falls on one of those days, that occurrence is skipped. Managers can enable **Run on weekends** on the template to also generate tasks on Saturdays and Sundays; holidays are always skipped. Weekly, bi-weekly, monthly, and yearly tasks are not affected — they generate on whatever date they fall, including weekends and holidays.

If a project has recurring tasks, open it and use the **Recurring** tab: it lists every recurring template with its schedule, **Active** / **Paused** / **Ended** status, and last/next-occurrence dates; expand a row to see the occurrences created so far. On My Projects the tab is personal (the recurring tasks assigned to you, plus any you set up if you manage projects) with a "Created by me" toggle, and you can filter by status, frequency, or assignee or search by name.

What is the difference between Internal and Client projects?

Internal projects are for your organization's own work. **Client** projects are for external clients and may have additional rules like the task closure approval workflow. **Business Development** projects track a pre-sales pitch for a prospective client (always non-billable; a client company is required — pick an existing one or create a new one inline). If the approval workflow is on, a newly created inline company and the BD project are reviewed together as one approval item. The pipeline runs Open / In Pitch → Success (Converted, into a new Client project on approval; the pitch is then closed read-only, keeping its tasks and time as the record) or Lost (read-only but fully accessible for future reference). BD projects appear in a dedicated section on the company page and on a dedicated Business Development page grouped by outcome.

Project codes are assigned automatically by type — **INT-** (Internal), **EXT-** (Client), **BD-** (Business Development) plus a running number (e.g. BD-0003). A custom unique code can be set via the edit (pencil) icon on the Create/Edit Project form; an auto code re-keys when the type changes, a custom code is preserved.

What do task priorities mean?

Priority	Meaning
Critical	Highest urgency — address immediately.
High	Important — should be completed soon.
Medium	Normal priority — standard work.
Low	Can be done when time permits.

What do task types mean?

Type	Meaning
Story	A user story or feature request.
Task	A general piece of work.
Bug	A defect or issue to fix.
Subtask	A smaller task that is part of a larger parent task.