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. This sends a reset request to your administrator. Once they enable the reset, you will be able to set a new password from the login page.

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.

Team Availability Widget

Shows which team members are on vacation, sick 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 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 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 **Availability Overrides** section, click **Add Override**.
3. Select the type: Vacation, Sick Leave, Holiday, or Other.
4. Set the start date, end date, and hours per day (0 = fully unavailable).
5. Click **Save**.

4. Timesheet

Location: My Work > My Timesheet

How to Log Time

1. Go to **My Timesheet**.
2. Select a **Project** from the dropdown.
3. Select a **Task** from the tasks dropdown.

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**.

How to Quick-Create a Task

Click the **Quick Task** button next to the task dropdown, enter a task name, and the task will be created immediately.

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**. Ask your project manager to reopen it, or ask them to log the time on your behalf (managers and admins can log time on closed tasks).

Duration Format

Durations are entered and displayed in a human-readable `H.MMh` style (e.g., `2.30h` = 2 hours 30 minutes). You can also type `1:30` colon format and the app will convert it automatically. A live preview shows the resolved duration as you type.

5. My Tasks

Location: My Work > My Tasks

Task Views

- **Table View** — A list with columns for name, project, status, priority, due date. Supports search and filters.
- **Board View** — Kanban-style cards grouped by task list columns.
- **Grouped View** — Tasks grouped by project.

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 will review and approve the closure.

How to Add Comments

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

How to Upload Attachments

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

6. My Projects

Location: My Work > My Projects

The projects page shows all projects you are assigned to. Click a project to see its detail page with project information, your assigned tasks, team members, and project timeline.

7. Notifications

Click the **bell icon** in the top navigation bar to see your notifications.

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 is due within the next 7 days.
Workload Alert	Your workload has exceeded capacity.
Approval Reviewed	An approval request was approved or declined.

7a. Feedback

Location: Help > Feedback (sidebar) or the **Feedback** button at the top of the Help page.

Use the feedback form to report a bug, request a feature, raise a UI issue, or send general feedback. Your submission lands in the admin inbox; admins close it with a resolution message and (when relevant) updated screenshots that you can see on your detail page.

- Pick a **Type**: Feedback, Feature Request, Bug Report, or UI Issue. Bug Report and UI Issue also require a **Severity**.
- Your **Name** and **Email** are pre-filled from your account but editable.
- **Page URL is required** — paste the address of the page your feedback is about (copy from your browser's address bar). The form will not submit without it.
- Attach up to **5 files** (5 MB each). Allowed: PNG, JPG, GIF, WebP, PDF, TXT, LOG.

The **My Feedback** page lists everything you've submitted. Filter by **Open** or **Closed**. When admins close your submission, you receive an in-app notification.

8. Tips & FAQ

What happens if I log time past midnight?

The system automatically splits the entry into two separate entries — one for each day.

What are recurring tasks?

Some tasks repeat automatically on a schedule. New instances appear in your My Tasks list automatically.

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.

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.