

Roles, user types, permissions

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 preset.

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.

ROLES LEVELS	USER TYPES	PERMISSIONS
Director	<ul style="list-style-type: none">● CEO● CFO● Sales Director	See All system data Manage Completely own projects, users, dashboards, templates Features All system features
Management	<ul style="list-style-type: none">● Project Manager● Portfolio Manager● SCRUM Master● Team Leader● Resource Manager● Help Desk Manager	See Data from own projects (where 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	<ul style="list-style-type: none">● Team Member● Sales Account● Help Desk Operator	See Data from own project (where a member) Manage Own tasks, own entries Features Task tracking, Time tracking, Calendars, Attendance planning, CRM, Help Desk
External	<ul style="list-style-type: none">● Client● External Worker● Anonymous	See Own data Manage Manage only own tasks or help desk tickets Features Task tracking, Time tracking, New Help Desk ticket

Features for user types

DIRECTOR LEVEL

Goals / Actions

Manage & monitor top-level KPIs, such as project budgets, payroll, invoicing, people & sales performance. Manage strategic projects using WBS, Gantt and task tracking.

Dashboard features

CEO

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

CFO

- Budgets Reports
- Payroll & Invoicing Reports
- Resource Management & Dashboard
- CRM Reports
- Cash-flow in Gantt or Report

Sales Director

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

MANAGEMENT LEVEL

Goals / Actions

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.

Dashboard features

Project Manager

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

Portfolio Manager

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

SCRUM Master

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

Team Leader

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

Resource Manager

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

Help Desk Manager

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

Features for user types

EXECUTIVE LEVEL

Goals / Actions

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.

Dashboard features

Team member

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

Sales account

- Sales Dashboard
- My Forecast
- My Finished Deals
- Contacts
- Sales Activity Race

Help Desk operator

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

EXTERNAL LEVEL

Goals / Actions

Use the system in a limited mode for Help Desk purposes or external cooperation on tasks.purposes or external cooperation on tasks.

Dashboard features

Client

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

External worker

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

Anonymous

- Can view public projects