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.

<table>
<thead>
<tr>
<th>ROLES LEVELS</th>
<th>USER TYPES</th>
<th>PERMISSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director</td>
<td>● CEO</td>
<td>See All system data</td>
</tr>
<tr>
<td></td>
<td>● CFO</td>
<td>Manage Completely own projects, users, dashboards, templates</td>
</tr>
<tr>
<td></td>
<td>● Sales Director</td>
<td>Features All system features</td>
</tr>
<tr>
<td>Management</td>
<td>● Project Manager</td>
<td>See Data from own projects (where a member)</td>
</tr>
<tr>
<td></td>
<td>● Portfolio Manager</td>
<td>Manage Completely own projects, users, dashboards, templates</td>
</tr>
<tr>
<td></td>
<td>● SCRUM Master</td>
<td>Features WBS, Gantt, SCRUM, Kanban, Resource management, Budgets, Finance statements, Reporting, Task tracking, Time tracking, Calendar</td>
</tr>
<tr>
<td></td>
<td>● Team Leader</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Resource Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Help Desk Manager</td>
<td></td>
</tr>
<tr>
<td>Executive</td>
<td>● Team Member</td>
<td>See Data from own project (where a member)</td>
</tr>
<tr>
<td></td>
<td>● Sales Account</td>
<td>Manage Own tasks, own entries</td>
</tr>
<tr>
<td></td>
<td>● Help Desk Operator</td>
<td>Features Task tracking, Time tracking, Calendars, Attendance planning, CRM, Help Desk</td>
</tr>
<tr>
<td>External</td>
<td>● Client</td>
<td>See Own data</td>
</tr>
<tr>
<td></td>
<td>● External Worker</td>
<td>Manage only own tasks or help desk tickets</td>
</tr>
<tr>
<td></td>
<td>● Anonymous</td>
<td>Features Task tracking, Time tracking, New Help Desk ticket</td>
</tr>
</tbody>
</table>

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## 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**

<table>
<thead>
<tr>
<th>User Type</th>
<th>Feature 1</th>
<th>Feature 2</th>
<th>Feature 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEO</td>
<td>Strategic Projects in WBS, Kanban or Sprint</td>
<td>Resource Management &amp; Dashboard</td>
<td>Payroll &amp; Invoicing Reports</td>
</tr>
<tr>
<td>CFO</td>
<td>Budgets Reports</td>
<td>Payroll &amp; Invoicing Reports</td>
<td>Resource Management &amp; Dashboard</td>
</tr>
<tr>
<td>Sales Director</td>
<td>Sales Dashboard</td>
<td>Contacts</td>
<td>Sales Activity Race</td>
</tr>
</tbody>
</table>

### MANAGEMENT LEVEL

**Goals / Actions**

**Dashboard features**

<table>
<thead>
<tr>
<th>User Type</th>
<th>Feature 1</th>
<th>Feature 2</th>
<th>Feature 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>Project WBS &amp; Gantt</td>
<td>Project Resource Management</td>
<td>Project Budgets</td>
</tr>
<tr>
<td>Portfolio Manager</td>
<td>Portfolio Gantt</td>
<td>Resource Management / Dashboard</td>
<td>Project Portfolio reports/list</td>
</tr>
<tr>
<td>SCRUM Master</td>
<td>SCRUM Board</td>
<td>Sprint Reports</td>
<td>Project Backlogs &amp; Sprints</td>
</tr>
</tbody>
</table>

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**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

**Team Leader**

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

**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

**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
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

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

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

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