EPM Admin User Guide

Managing Projects & Teams

Welcome to the EPM Admin Dashboard

As an Executive Project Manager (EPM) Admin, you play a critical role in overseeing projects, monitoring team performance, and ensuring smooth collaboration across your organization. This guide will walk you through the key features of your dashboard and help you manage your responsibilities effectively.

Your Responsibilities

- Monitor project progress
- Track task completion across projects
- Review team hours and productivity
- Coordinate and collaborate with project teams

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1. Getting Started

Logging In

1. Navigate to the CDF login page.
2. Enter your registered email and password.
3. Click **Sign In**.
4. You will be taken directly to your EPM Admin Dashboard.

Welcome Back
Sign in to your account

Email

Enter your email
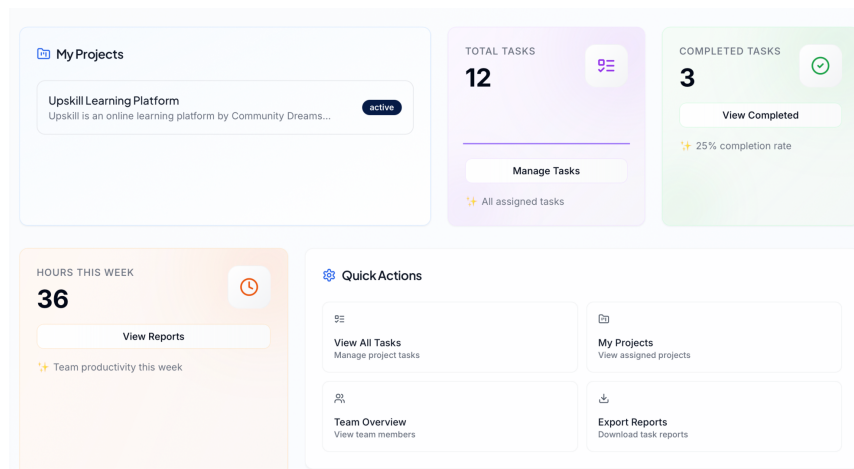
Password

Enter your password

Forgot Password?

Sign In

← Back to Home

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2. Dashboard Overview

Once logged in, you'll see a personalized dashboard featuring:

- **My Projects** — All projects assigned to you
- **Total Tasks** — Aggregated tasks across all managed projects
- **Completed Tasks** — Task completion metrics and percentages
- **Hours This Week** — Total logged hours for the current week
- **Quick Actions** — Shortcuts to commonly used tools

My Projects

Upskill Learning Platform
Upskill is an online learning platform by Community Dreams...   active

TOTAL TASKS
12
Manage Tasks
✨ All assigned tasks

COMPLETED TASKS
3
View Completed
✨ 25% completion rate

HOURS THIS WEEK
36
View Reports
✨ Team productivity this week

Quick Actions

View All Tasks
Manage project tasks

My Projects
View assigned projects

Team Overview
View team members

Export Reports
Download task reports

3. Managing Projects

Viewing Projects

In the **My Projects** section, each project card displays:

- Project name
- Brief description
- Status badge (Active, Completed, On Hold)

To view project details:

1. Click any project card.
2. Navigate to the **Projects** tab for complete information.

Project Status Types

- **Active** — Project is currently in progress
- **Completed** — Project has been fully delivered
- **On Hold** — Work is paused temporarily

4. Task Management

Viewing All Tasks

Go to the **Tasks** tab in the sidebar to view:

- Full list of tasks across your projects
- Task details such as title, assigned volunteer, logged hours, and status
- Filtered task views for easier tracking

| Volunteer	Status	Total Tasks	Total Hours	Recent Activity	Last Activity	Actions
Chetan Krishna Udatha uchetankrishna@gmail.com	Active	1	3.0h	● 1 tasks (30d)	11/14/2025	⊙ View Tasks
Rakesh Thota thotarakesh272@gmail.com	Active	0	0.0h	● 0 tasks (30d)	No activity	⊙ View Tasks
Vishwak Nunna vishwaknunna572@gmail.com	Active	0	0.0h	● 0 tasks (30d)	No activity	⊙ View Tasks
Sujith Ari sujithari.career@gmail.com	Active	2	6.0h	● 2 tasks (30d)	11/13/2025	⊙ View Tasks
Vishnu Jagadeesan vishnujagadeesan05@gmail.com	Active	2	6.0h	● 2 tasks (30d)	11/14/2025	⊙ View Tasks
Amitha Koyyada amithakoyyada755@gmail.com	Active	1	3.0h	● 1 tasks (30d)	11/10/2025	⊙ View Tasks

Task Statistics

Your dashboard highlights:
- **Total Tasks** — All tasks created under your projects
- **Completed Tasks** — Count and percentage completed
- **Completion Rate** — Visual progress bar

TOTAL TASKS

12

Manage Tasks
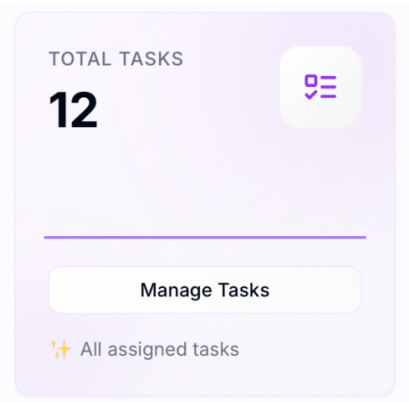
✨ All assigned tasks

Tracking Team Hours

The **Hours This Week** card displays:

- Total hours logged by all team members assigned to your projects
- Week-over-week productivity trends

HOURS THIS WEEK

36

🕐

View Reports

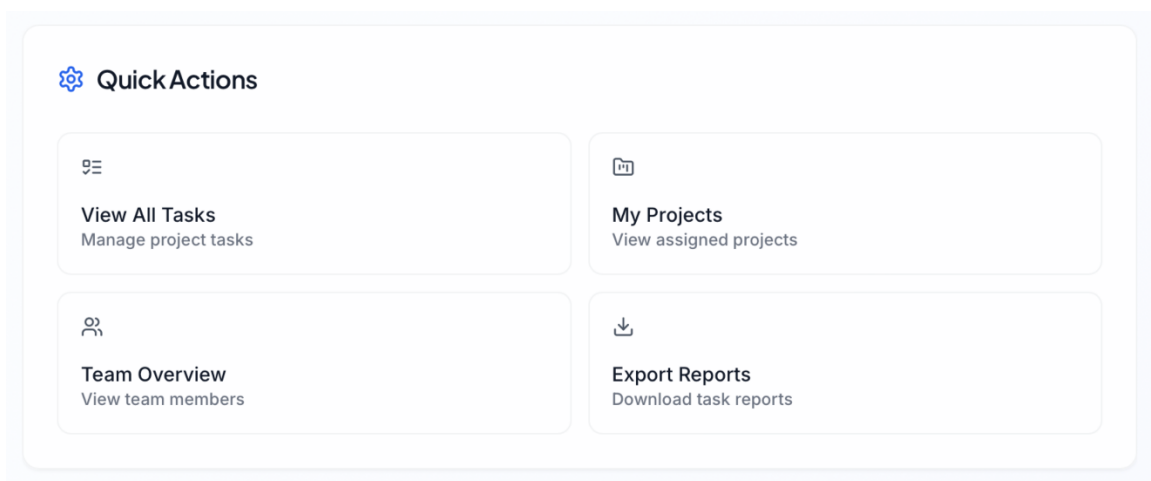✨ Team productivity this week

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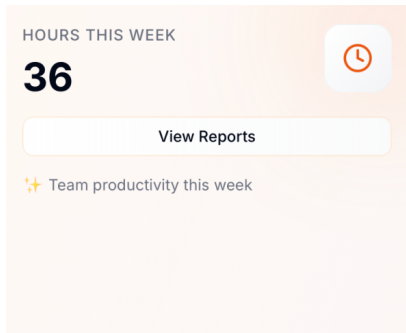
5. Quick Actions

Quick Actions help you navigate faster. Options include:

- **View Tasks** — Access full task list
- **View Projects** — Open your project portfolio
- **View Team** — View team member information
- **Export Data** — Download reports for analysis

To use:

1. Click any Quick Action button.
2. You'll be redirected instantly to the respective section.

⚙️ Quick Actions

View All Tasks
Manage project tasks

My Projects
View assigned projects

Team Overview
View team members

Export Reports
Download task reports

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6. Sidebar Navigation

Your sidebar includes the following tabs:

Dashboard
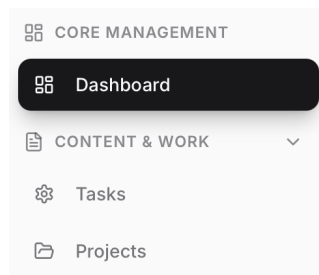Overview of your projects, tasks, and productivity metrics.

Tasks
Centralized location for managing all tasks associated with your projects.

Projects
View the full portfolio of projects, including detailed information.

Notifications
Stay informed with project updates, task changes, and team alerts.

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7. Understanding Your Metrics

Task Completion Rate
- Formula: **(Completed Tasks / Total Tasks) × 100**
- Tracks overall progress
- Updates in real-time as tasks are completed

Weekly Hours
- Shows total hours logged by team members
- Resets every Monday
- Reflects time spent across all active projects
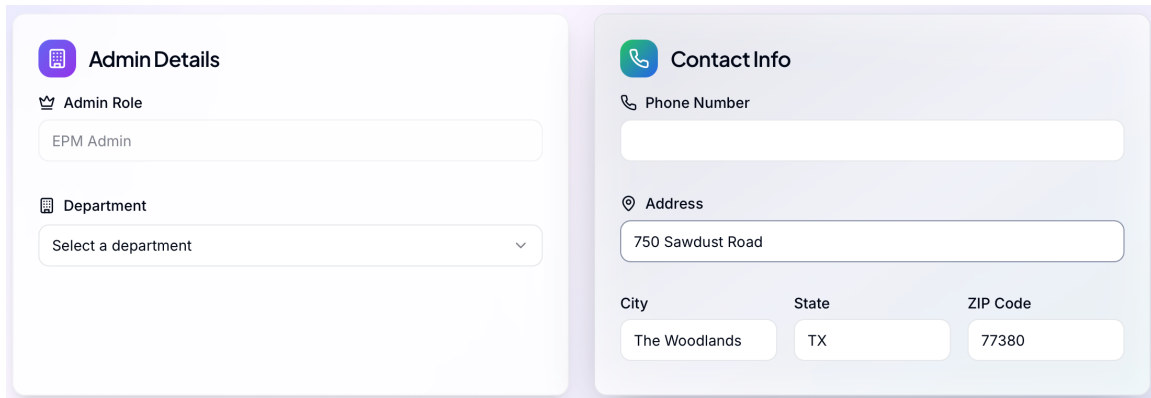
Task Trends
- A 7-day snapshot of task activity
- Helps identify productivity patterns
- Green upward trends indicate improvement

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8. Managing Your Profile

Viewing Profile

1. Click **Profile** at the bottom of the sidebar.
2. Review your personal information and admin permissions.

Changing Password

1. Go to your **Profile**.
2. Select **Change Password**.
3. Enter your current password.
4. Enter your new password twice.
5. Click **Update Password**.

9. Notifications

The **Notifications** tab provides real-time updates on:
- Task status changes
- Project updates
- Team assignments and activity
- System announcements

Notifications
All caught up!

All	Unread	Tasks	Payments	Community

🔔

No notifications

No all notifications found.

Notification Categories

- 🔔 **Task Updates** — Completed or modified tasks
- 📊 **Project Updates** — Changes in project details or status
- 👥 **Team Activity** — New assignments or role changes

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10. Best Practices for EPM Admins

✔ Check your dashboard daily to stay updated
✔ Monitor task completion rates to identify delays
✔ Keep project details accurate for reliable reporting
✔ Respond promptly to notifications
✔ Use Quick Actions to streamline your workflow
✔ Track weekly logged hours to ensure balanced workloads

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11. Logging Out

1. Click **Logout** at the bottom of the sidebar.
2. Confirm the action.
3. You'll be redirected to the Login page.

[→ Logout

Need more help?
Reach out to your Super Admin or the IT Support Team for further assistance.