

Projects – Project Manager User Manual

Audience: Project Managers.

PM manages projects and can create/edit where permitted. The PM view differs significantly from Admin's read-only experience.

Navigation

- Header → Projects
- Projects list: /projects
- Project detail (PM): /projects/:id/detail

Projects List (PM)

- Client-side search and filters (status/role, etc.)
- Pagination and page size controls
- Columns: Project, Client (address), Status, Priority, Manager
- Actions: Details (opens PM view), Edit (where allowed)
- Create Project button is visible for non-admins

Project Detail (PM)

- Overview: project info, dates, status, priority
- Team: manage team members, invite with the "+ Add Worker" dialog
- Tasks: task lists, calendar/gantt views (as implemented in the app)
- Files/Photos/Reports: project artifacts

Editing a Project (PM)

This section summarizes the core editing workflows. Exact UI labels may vary slightly; concepts remain the same.

1) Project Info

- Edit name, address, status, priority
- Set start/end dates (affects default task date bounds)

- Save applies changes immediately

2) Task Management (List View)

- Create task: title, description, status, assignees, dates
- Inline edits: change status/priority without leaving the list
- Bulk actions: multi-select → status/assignee/date changes
- Filters: status, assignees, date range, WBS path
- Sorting: by priority, status, start/end date

3) Calendar View

- Visualize tasks by dates (week/month)
- Drag to reschedule (start/end)
- Resize to change duration
- Conflict hints: overlapping critical tasks are highlighted
- Quick create: click on a day to add a task

4) Gantt (Read/Plan)

- Timeline of tasks with dependencies
- Drag bars to shift start/end; drag edges to change duration
- Zoom (day/week/month)
- Critical path highlight (optional)

5) Dependencies (Predecessor → Successor)

- Types: Finish-to-Start (FS), Start-to-Start (SS), Finish-to-Finish (FF), Start-to-Finish (SF)
- Lag/Lead: add positive (lag) or negative (lead) offsets (e.g., +2d, -1d)
- Validation: prevent circular links, warn on impossible schedules, respect constraints
- Editing: add/remove links in task details; drag link handles in Gantt (if enabled)

6) Milestones

- Zero-duration tasks to mark major checkpoints
- Can be predecessors/successors in dependencies

7) Resources & Assignments

- Assign PM team members to tasks
- Capacity: avoid double-booking (visual hints)

- Roles: PM, Architect, Contractor, etc.

8) Progress Tracking

- Status: Pending → In-Progress → Completed → Blocked
- Percent complete (if available) updates progress bars
- Actual vs planned dates (slippage indicators)

9) Notifications & Collaboration

- Commenting on tasks (mentions, attachments)
- Change log: who changed what and when
- Admin read-only: admins view PM data but cannot edit

10) Constraints & Validation Rules

- Date constraints: earliest start, latest finish
- Dependency rules as above
- Cross-checks: task cannot finish before it starts; parent summary spans children

11) WBS (Work Breakdown Structure)

- Hierarchy of tasks and phases
- Roll-up dates/progress to parent
- Collapse/expand levels; filter by WBS path

12) Baselines (optional)

- Capture a snapshot of the plan
- Compare current schedule to baseline (variance)

13) Reports and Exports

- Export task list (CSV/PDF)
- Print Gantt snapshot for status meetings

14) Keyboard/UX Shortcuts (if enabled)

- Enter: add next task
- Ctrl/Cmd+S: save changes
- Drag with Alt/Option: copy task (if supported)

Best Practices

- Keep task dates realistic; avoid excessive overlap
- Use milestones to anchor releases/inspections
- Add dependencies sparingly; prioritize critical path
- Review weekly in Gantt; daily in List/Calendar

Creating a Project

- Click “Create Project” on the list page
- Fill basic info and save
- After creation, configure team and tasks

Inviting Workers

- Use “+ Add Worker” (Team) to invite by email, assign role and optional specialization/ phone
- Invitations record the inviter automatically

Differences vs Admin

- PM can create and edit projects; Admin is read-only
- PM opens `/projects/:id/detail`; Admin opens `/projects/:id/admin`

Tips

- Keep statuses updated to reflect real progress
- Use filters/search to quickly find active or pending projects
- Coordinate with Admin using the overview and reports

Troubleshooting

- “Create Project” missing: ensure you are not logged in as Admin
- Cannot edit: check your role or project permissions
- Invite not delivered: verify email format and spam folder