Greytrix Project Management for Creatio

GREYTRIX

Contents

Introduction

Greytrix India Pvt Ltd is a registered Development Partner and Business Solutions Provider. Having a long history with the Sage CRM Products from its early days in eWare, through to being acquired by ACCPAC, and therein Sage, Greytrix India Pvt Ltd has unrivalled, direct practical knowledge and experience with the Creatio CRM system.

Project Manager takes all the main concepts of Project and Time Management and delivers a pragmatic and highly effective management tool which is installed on top of the Creatio CRM platform. It is completely integrated into Creatio CRM so that all the benefits of CRM including custom design of user interface, searching and document management are available.

The features of Project Manager are outlined in this documentation.

Key Features:

The "Greytrix Project Management for Creatio" app enhances your workflow by adding tools for efficient project management within the Creatio platform. This app enables businesses to organize and track projects, manage tasks, and log timesheets seamlessly.

Project Management: Create and manage projects with detailed overviews, including timelines, budgets, and objectives.

Task Tracking: Assign and monitor tasks linked to specific projects, complete with deadlines, priorities, and statuses.

Timesheet Management: Track resource hours and link logged time to specific tasks for accurate billing.

Dashboards: Access visual insights with dashboards that showcase project progress, resource allocation, task completion, and more.

Business Value: "Greytrix Project Management for Creatio" is designed to streamline project workflows, enhance team collaboration, and improve resource utilization. It provides real-time visibility into project progress, helping businesses deliver on time and within budget. The app ensures better communication and accountability for all project stakeholders.

This app is ideal for teams looking to centralize their project and task management, track resource performance, and gain actionable insights through analytics.

Installation

To install the Project Manager package from the Creatio marketplace, follow these steps:

1. **Access the Marketplace**
   Go to the Creatio Marketplace in your web browser.

2. **Search for Greytrix Project Manager**
   Use the search bar to find the "Greytrix Project Management for Creatio" package.

3. **Select the Package:**
   Click on the GUMU package from the search results to access its details page.

4. **Check Compatibility**
   Ensure that the package is compatible with your version of Creatio.

5. **Download or Install**
   Depending on the options provided, you can either download the package or directly install it into your Creatio environment.

6. **Login to Creatio**
   If prompted, log in to your Creatio account to proceed with the installation.

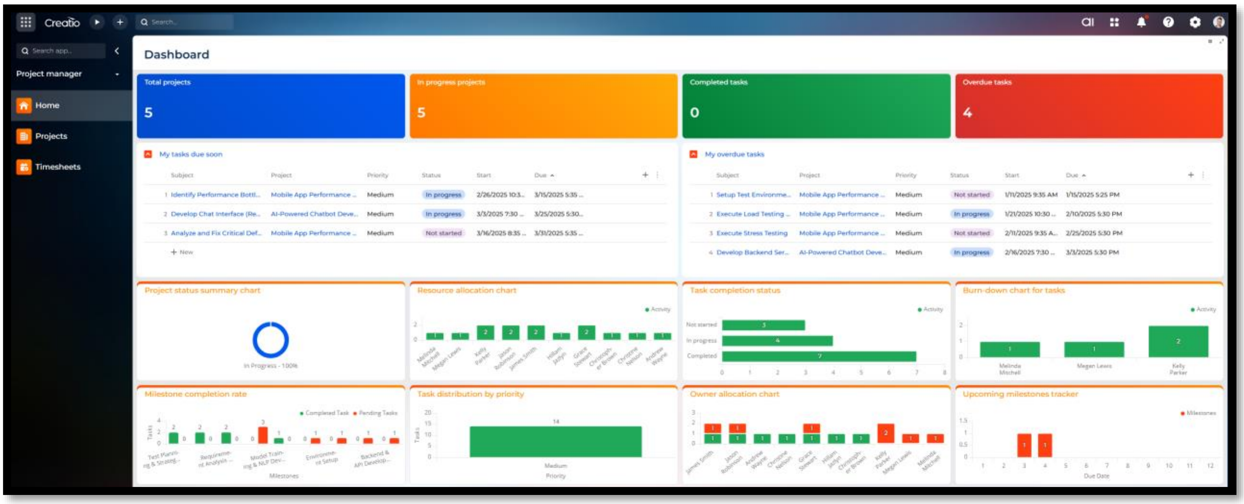
7. **Follow Installation Instructions**
   Follow the on-screen instructions to complete the installation process. This may include accepting terms and conditions, selecting the appropriate environment, and configuring necessary settings.

8. **Verification**
   After installation, verify that the GUMU package is installed correctly by checking the list of installed packages in your Creatio system.

9. **Configuration and Usage**
   Configure the package as needed and start using its features as per your requirements.

APP Home Page

The App Home Page is the central dashboard of the Creatio CRM Project Manager add-on, designed to provide users with a comprehensive overview of project and task statuses. It serves as a centralized hub for monitoring progress, managing priorities, and accessing critical project metrics, enabling users to make data-driven decisions and streamline workflows effectively.



Key Sections of the Home Page

Dashboard Summary Tiles

Located at the top of the page, these tiles provide quick insights into key metrics:

- **Total Projects:** Displays the total number of projects managed within the system.
- **In Progress Projects:** Indicates the number of projects currently underway.
- **Completed Tasks:** Shows the total number of tasks successfully completed.
- **Overdue Tasks:** Highlights tasks that are overdue, enabling users to prioritize urgent actions.

Task Lists

- **My Tasks Due Soon:** Displays a list of tasks approaching their deadlines, sorted by priority. This helps users stay on top of upcoming work.
- **My Overdue Tasks:** Lists all tasks that have passed their due dates, allowing users to address delays effectively.

Visual Performance Metrics

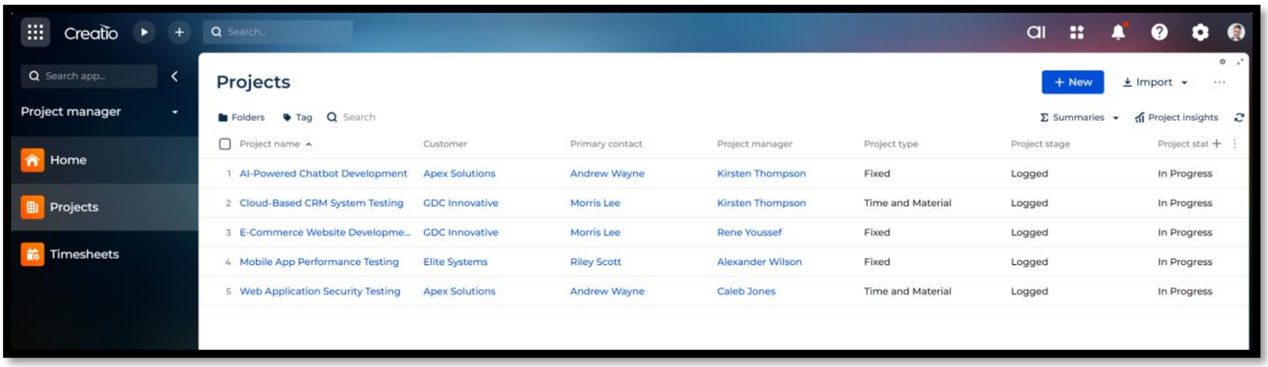
Several charts and graphs provide a detailed visual representation of project and task statuses:

- **Project Status Summary Chart:** Shows the percentage of planned, in-progress, and completed projects.
- **Task Completion Status:** Indicates the number of pending vs. completed tasks.
- **Resource Allocation Chart:** Provides a breakdown of how resources are distributed across different areas (e.g., developers, testers, admins).
- **Task Distribution by Priority:** Categorizes tasks into priority levels (e.g., high, medium, low) for better workload management.
- **Milestone Completion Rate:** Tracks the progress of milestones, showing completed vs. pending milestones.
- **Upcoming Milestones Tracker:** Displays milestones approaching their due dates, helping users focus on critical deadlines.
- **Burn-Down Chart for Tasks:** Visualizes the rate of task completion over time to assess project pacing.

Projects

Project Listing

The Project List screen provides a centralized view of all projects, allowing users to effectively manage and monitor their status. Below are the key features and functionalities visible on this screen.



Folders for Data Filtering

- ➢ Easily categorize and filter projects based on predefined folders.
- ➢ This feature enables users to focus on specific project categories without navigating through unrelated entries.

Tag-based Classification

- ➢ Utilize tags to label and group projects for easier tracking and retrieval.
- ➢ Tagging allows for better organization and flexibility in filtering the project list.

Search Option

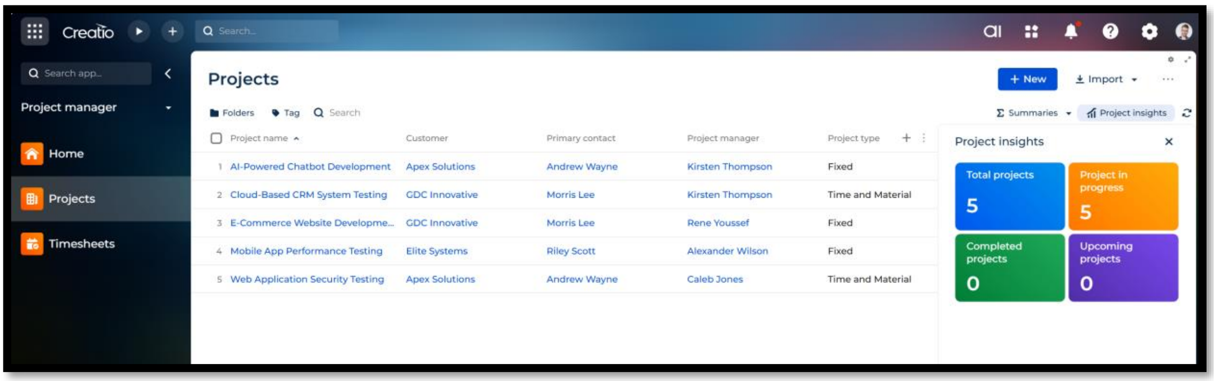
- ➢ Quickly locate specific projects using the search bar at the top of the list.
- ➢ Enter keywords related to the project name, customer, or other fields to refine results.

Total Projects Counter

- ➢ Displays the total count of projects listed, providing a quick snapshot of workload or inventory.

Project Insights Panel

- ➢ The Project Stats button opens a panel displaying graphical and numerical insights about the project statuses.



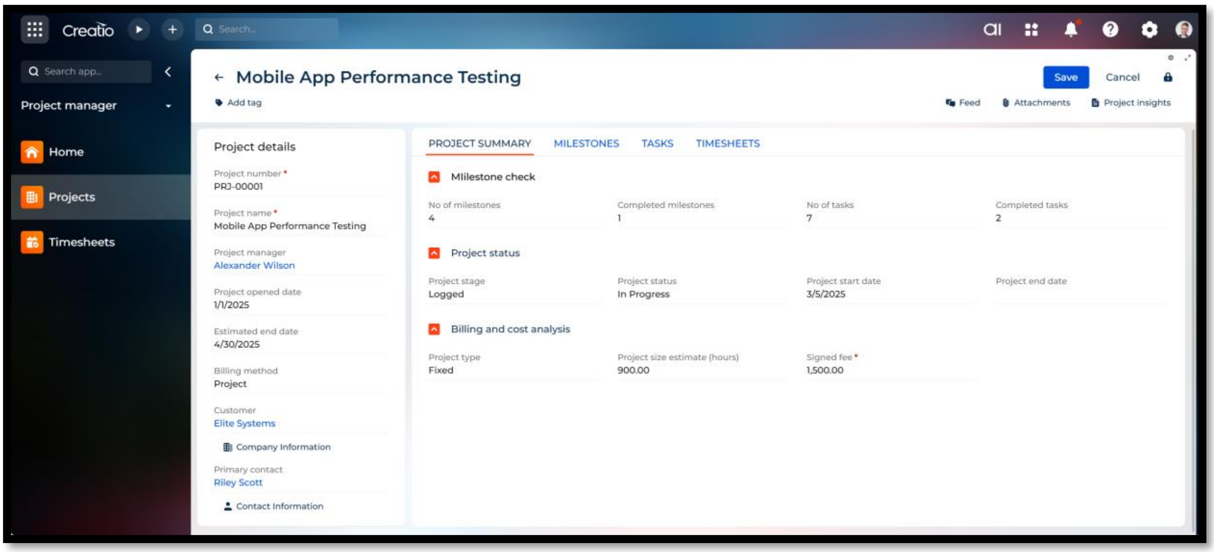
Metrics include:

- **Total Projects:** The overall count of all projects in the system.
- **Upcoming (Planned) Projects:** Projects scheduled to start soon.
- **Projects In Progress:** Projects currently active and underway.
- **Completed Projects:** Projects successfully finished.
- **Overdue Projects:** Projects that have passed their deadlines.

Create Project(s)

You can create a new project by clicking the “New” on the right side of the screen. You will be presented with the following screen.

The screen is organized into various sections for streamlined navigation and data entry. Users can define the project name, timeline, resources, milestones, tasks, and financial details to ensure proper tracking and execution.



Field List and Descriptions

Sr. No.	Field Name	Short Description
1	Project Number	A unique identifier for the project (e.g., "PRJ-00012").
2	Project Name	The title or name of the project (e.g., "ITech Implementation Plan").
3	Stage	Indicates the current phase of the project lifecycle (e.g., Initiation).
4	Status	Reflects the progress or state of the project (e.g., "In Progress").
5	Customer	The organization or client commissioning the project (e.g., Aster DM).
6	Primary Contact	The main contact person from the customer's organization.
7	Project Manager	The person responsible for managing and overseeing the project.
8	Tasks and Milestones Section	Displays details about the number of tasks, milestones, completed tasks, and resources assigned.
9	Timeline & Duration Section	Specifies the start date, estimated end date, calculated end date, and project duration.
10	Invoice Details Section	Covers the invoicing method, allocated hours/days, billed hours/days, and remaining unbilled hours/days.

Key Sections and Tabs

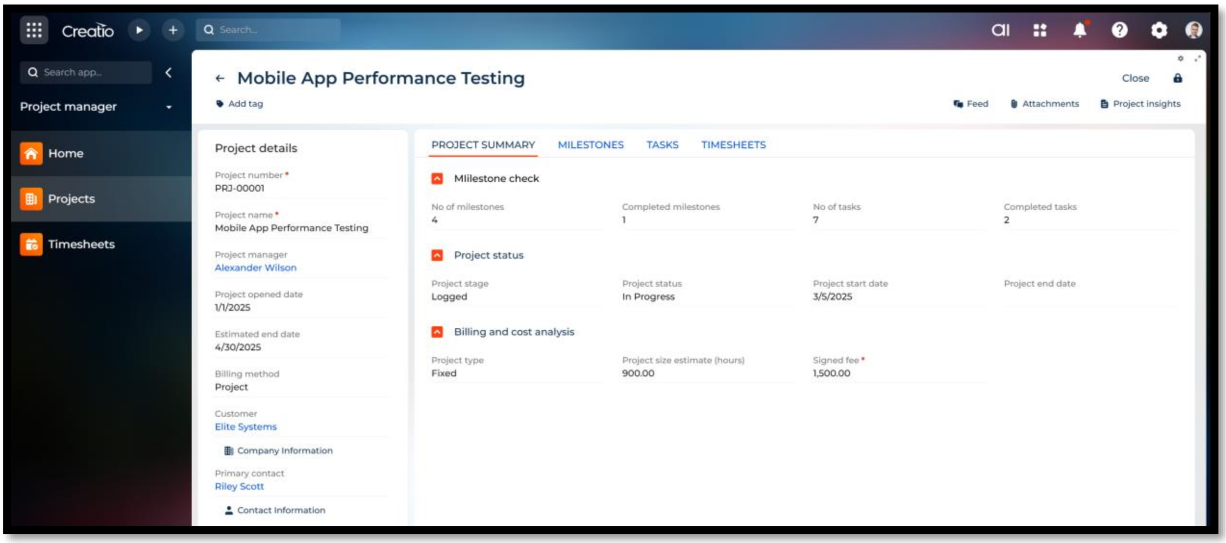
➢ **Project Details Overview**
Displays critical project attributes, including the name, project number, customer, contact, and assigned project manager.

➢ **Main Tabs**
- **Project Details:** Highlights core information such as milestones, tasks, timelines, and invoicing details.
- **Resources:** Assigns team members and resources to the project.
- **Milestones:** Lists specific goals or checkpoints for the project.
- **Tasks:** Tracks detailed task lists and their statuses.
- **Timesheets:** Logs hours worked by team members.

➢ **Save/Cancel Options**
At the top-right corner, users can save changes or cancel edits. Options for Feed, Attachments, and Project Insights are also available.

Project Summary

The **Project Summary** screen provides an overview of the project's key information. It is divided into three sections.



➢ **Milestones Check**
This section provides an overview of the tasks and milestones associated with the project. It offers insights into the number of milestones and tasks planned, the number completed, and the percentage of tasks finished. This information helps in tracking progress and identifying areas that require attention.

Field List and Descriptions

Sr. No.	Field Name	Short Description
1	Number of Milestones	Total number of milestones defined for the project.
2	Number of Tasks	Total number of tasks included in the project.
3	Completed Tasks	The number of tasks that have been successfully completed.

4	Completed Task (%)	Percentage of completed tasks relative to the total number of tasks.

- **Project Status**:
  This section highlights the project's timeline, including key dates and the current phase of progress. It is designed to provide transparency on whether the project is on track, delayed, or ahead of schedule. Project managers can use this section to ensure milestones are achieved within the planned time.

Field List and Descriptions

Sr. No.	Field Name	Short Description
1	Start Date	The date when the project was initiated.
2	Estimated End Date	The anticipated completion date of the project.
3	Project Stage	The current phase of the project (e.g., Initiation, Planning, Execution).
4	Project Status	Indicates whether the project is In Progress, On Hold, or Completed.
5	Estimated Project Duration	The projected time required to complete the project.
6	Calculated End Date	The system-calculated date for project completion based on current progress.

- **Billing and Cost Analysis**
  This section focuses on financial tracking and resource allocation for the project. It ensures transparency in invoicing and helps project managers monitor allocated, billed, and unbilled time, as well as remaining resources.

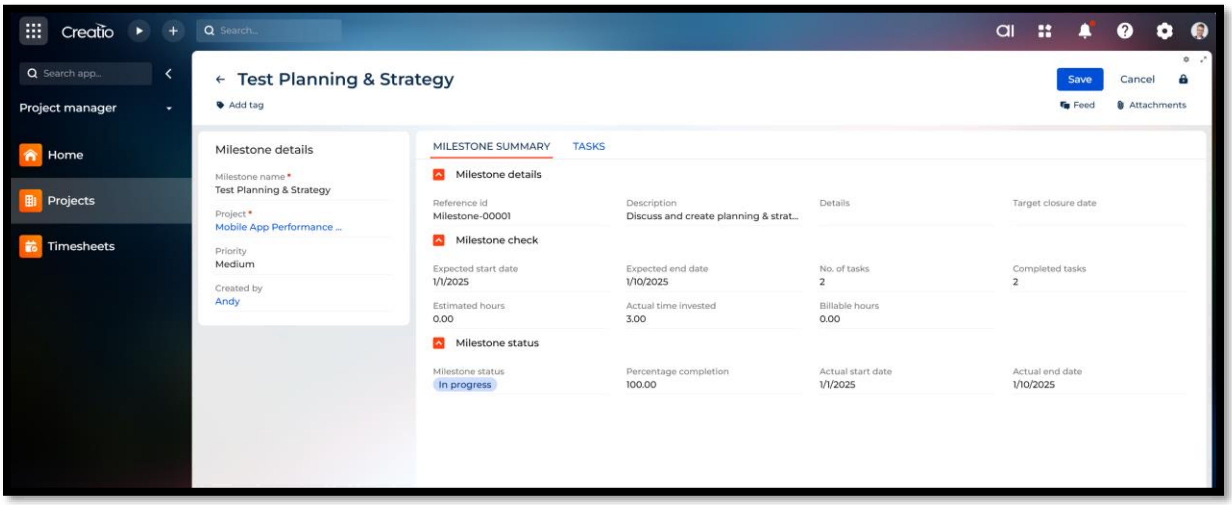
Field List and Descriptions

Sr. No.	Field Name	Short Description
1	Invoice Method	The methodology used for billing (e.g., time-based, milestone-based).
2	Allocated Days	Total number of days allocated for the project.
3	Unallocated Days	Days not yet assigned to specific tasks or resources.
4	Billed Days	Total number of days already invoiced.
5	Unbilled Days	Total number of days yet to be invoiced.
6	Allocated Hours	Total number of hours allocated for the project.
7	Unallocated Hours	Hours not yet assigned to specific tasks or resources.
8	Billed Hours	Total number of hours already invoiced.
9	Unbilled Hours	Total number of hours yet to be invoiced.
10	Remaining Hours	Total remaining hours available for the project.

Milestones

Create Milestone(s)

The **Create Milestone** screen is used to define and manage milestones within a project. Milestones represent significant phases or checkpoints in the project lifecycle, ensuring effective tracking of progress and deliverables.

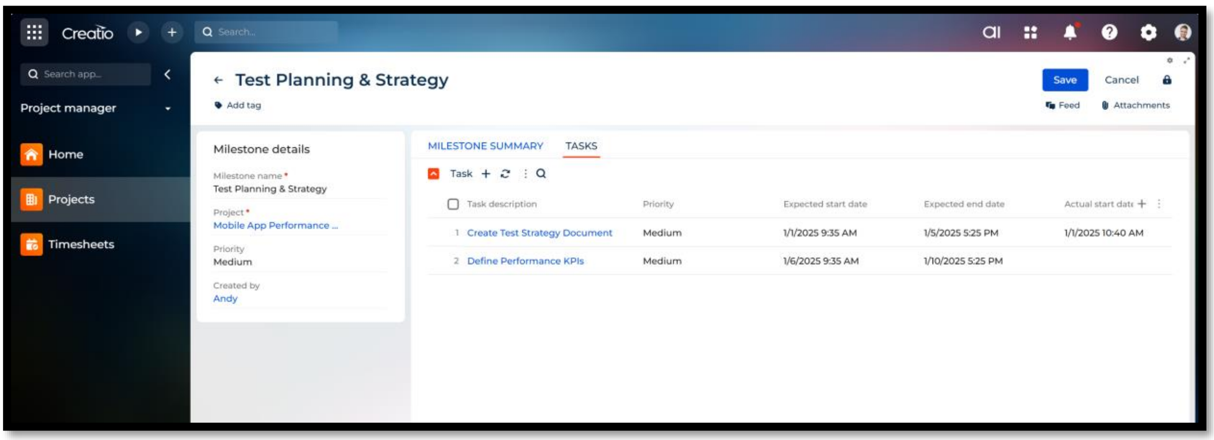


Milestone Summary

The **Milestone Summary** screen provides a holistic view of milestone progress and associated tasks. Users can track the number of completed tasks, billable hours, and progress percentages at a glance.

The screen consists of two primary tabs: **Milestone Details** and **Tasks**.

The **Tasks** tab allows users to view and manage tasks associated with the milestone, offering seamless tracking of deliverables and dependencies.



Fields in the Milestone Details Tab

Sr. No	Field Name	Short Description
1	Reference ID	Unique identifier assigned to the milestone.

2	Description	Details describing the purpose and scope of the milestone.
3	Target Closure Date	The expected date for the milestone to be completed.
4	Expected Start Date	The planned starting date of the milestone.
5	Expected End Date	The planned end date of the milestone.
6	Number of Tasks	Total number of tasks associated with the milestone.
7	Estimated Hours	The total estimated hours required to complete the milestone.
8	Actual Time Invested	The actual time spent working on the milestone.
9	Completed Tasks	The number of tasks marked as complete under the milestone.
10	Billable Hours	The total billable hours logged for the milestone.
11	Milestone Status	Current status of the milestone (e.g., Waiting, In Progress, Completed).
12	Percentage Completion	Percentage of the milestone that has been completed.
13	Actual Start Date	The actual date when the milestone work began.
14	Actual End Date	The actual date when the milestone was completed.

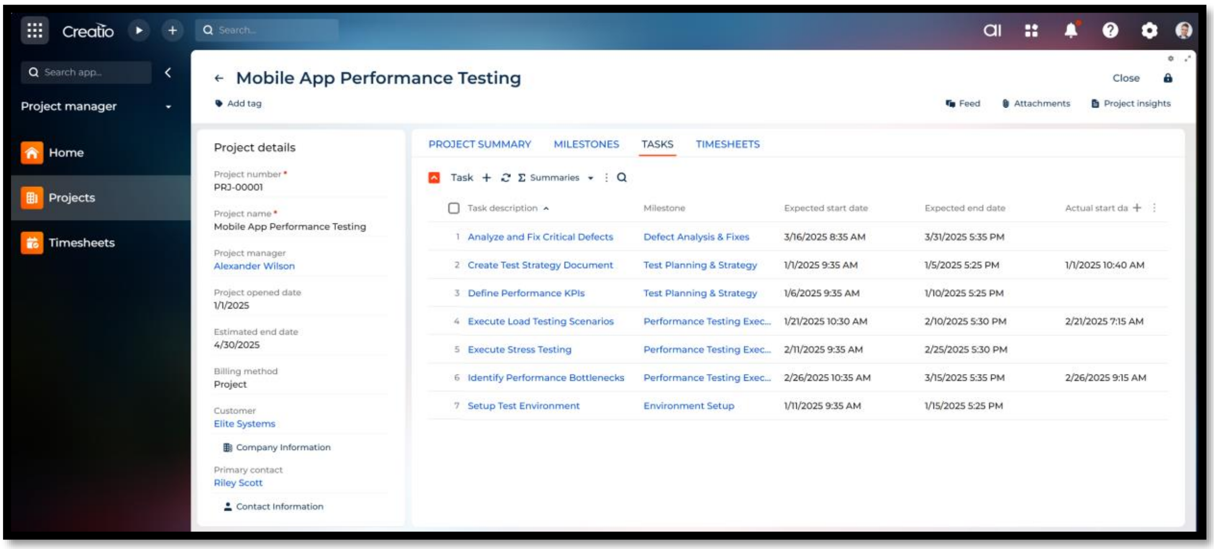
Project Tasks

Project Tasks are where all the breakdown and planning effort is applied to the Project. Each Task is a piece of work which has been identified by the manager of a project as an identifiable effort. This needs to be allocated to a Resource, scheduled with a due date, and status maintained on an on-going basis. It also needs to be given an allocation of days so that the allocated Resource knows what time they have available to complete this Task.

A project can have multiple tasks associated with it, but a task can only be associated with one project.

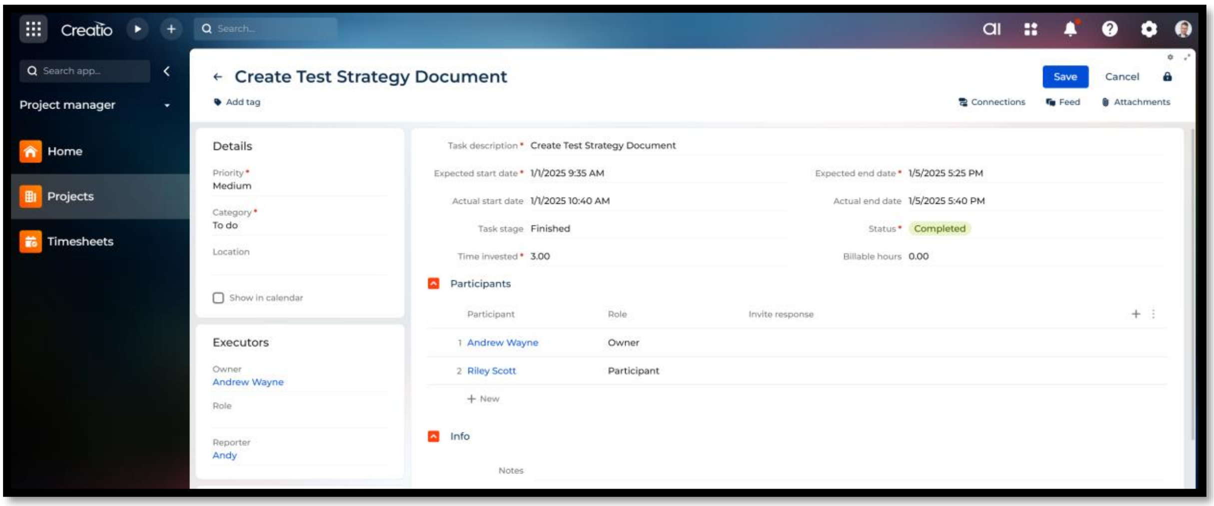
Task Listing

You can view a full listing of all tasks belonging to this project by clicking the 'Project Tasks' tab. On this listing you can all important details including Due Date, Task Name, Status, Project, Assigned User, allocated (Days), Billed (Days), Unbilled (Days) and Remaining (Days) for the Task.



Create Task(s)

The **Create Task** screen in Creatio CRM is designed to facilitate the creation of new tasks within a project. It is logically structured into two primary sections to organize task-related data.



Task Details

By Clicking into a Task, full detail can be seen. This sample screen shows the details of a single task.

- **Task Information**
  This section provides basic task details and associations.

- **Task Details**
  This section captures detailed specifications of the task.

- **Additional Features**
  - **Add To Timesheet**: Facilitates logging the task into a timesheet.
  - **Copy Task**: Enables duplication of the task for similar entries.
  - **Save**: Saves the task details.
  - **Cancel**: Cancels the task creation process.
  - **Feed**: Displays an activity feed related to the task.

Fields of the Task Screen

Sr. No.	Field Name	Short Description
1	**Project**	Name of the project the task is associated with.
2	**Task Name**	Title or name of the task.
3	**Reference ID**	Unique identifier for the task.
4	**Milestone**	Project milestone linked to the task.
5	**Milestone Check**	Checkbox to indicate milestone completion.
6	**Expected Start Date**	Planned start date and time for the task.

7	**Expected End Date**	Planned end date and time for the task.
8	**Estimated Hours**	Estimated time required to complete the task.
9	**Billed Hours**	Hours recorded for billing purposes.
10	**Task Stage**	Current stage or status of the task (e.g., "Completed").
11	**Actual Start Date**	Actual start date and time of the task.
12	**Actual End Date**	Actual end date and time of the task.
13	**Invested Time**	Total time spent on the task (if available).
14	**Assigned User**	User assigned to perform the task.
15	**Priority**	Level of urgency for the task (e.g., "Low").

Timesheets

Timesheets allow your resources to log their work entries on a diary basis, cross-referencing projects and tasks to help regulate the schedule and progress of the project. Rather than maintaining the project purely by task updates, timesheets give you the realistic scenario of what is actually happening versus what should be happening.

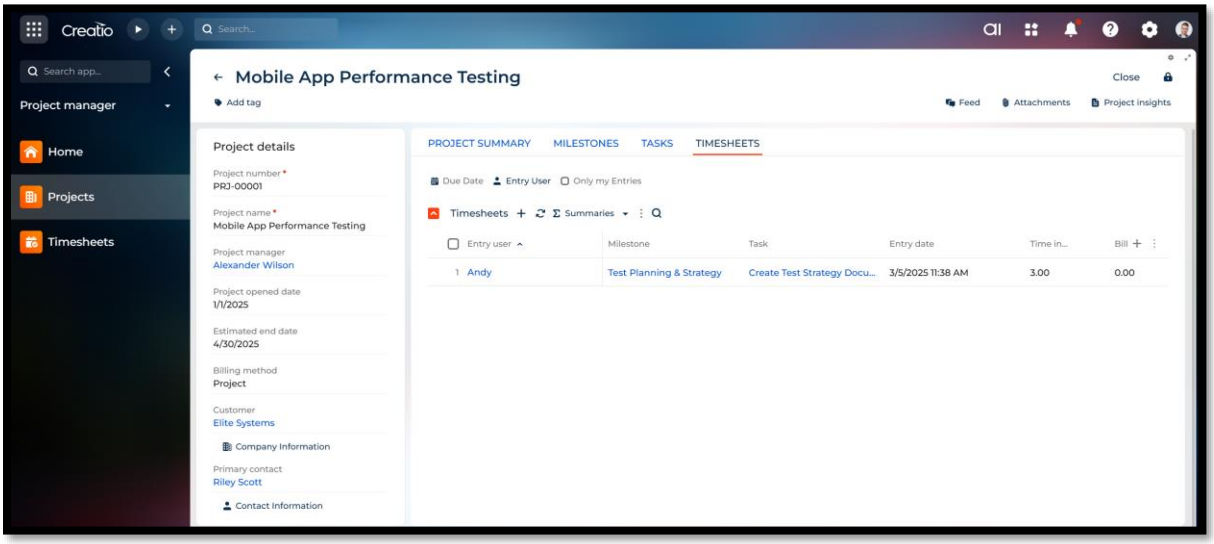
Timesheets contain the concept of **billable** and **unbillable** days. This allows resources to log timesheets as a mixture of billable time (which is potentially cross charged to a client), and unbillable time. Unbillable time may be internal activities, or time which has to be absorbed internally rather than charging one to the client.

Billable days are the basis of drawdown of allocation of days on tasks. These are the entries which will affect the ‘**Estimated and Calculated End Dates’**. It will also affect the running **‘Remaining Days’** on each individual task. Unbillable days will not affect these metrics of the project.

For those Projects which are not deemed commercial, simply using billable days instead of a mixture of billable and unbillable is recommended to allow the end dates to be calculated properly as the project progresses.

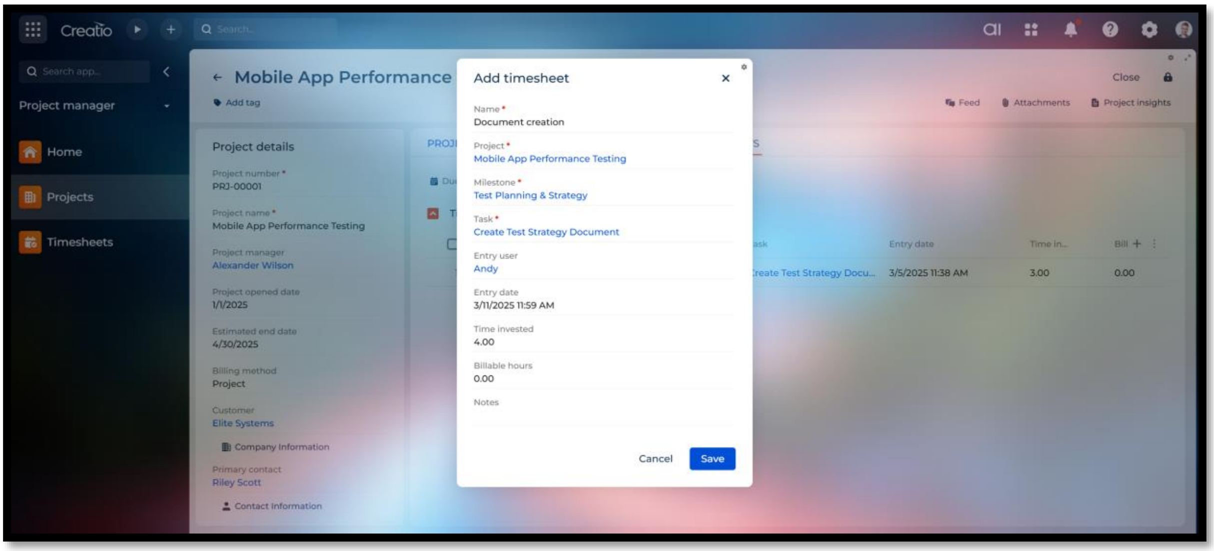
Timesheet Listing

A full listing of all time sheets belonging to this project can be seen in the **Timesheets** tab. There are two modes of view of the Timesheets: Calendar View’ and ‘List View’. In either view, by clicking into the appropriate entry, the full timesheet details can be seen (see next section). Here is a sample of the ‘Calendar’ view.



Add/Edit Timesheet Entries

The "Add Timesheet" screen allows users to log their time for a specific project, milestone, and task. Users can input the time spent, track billed and unbilled hours, and add relevant notes for better time management. This screen ensures accurate tracking for project management and billing purposes.

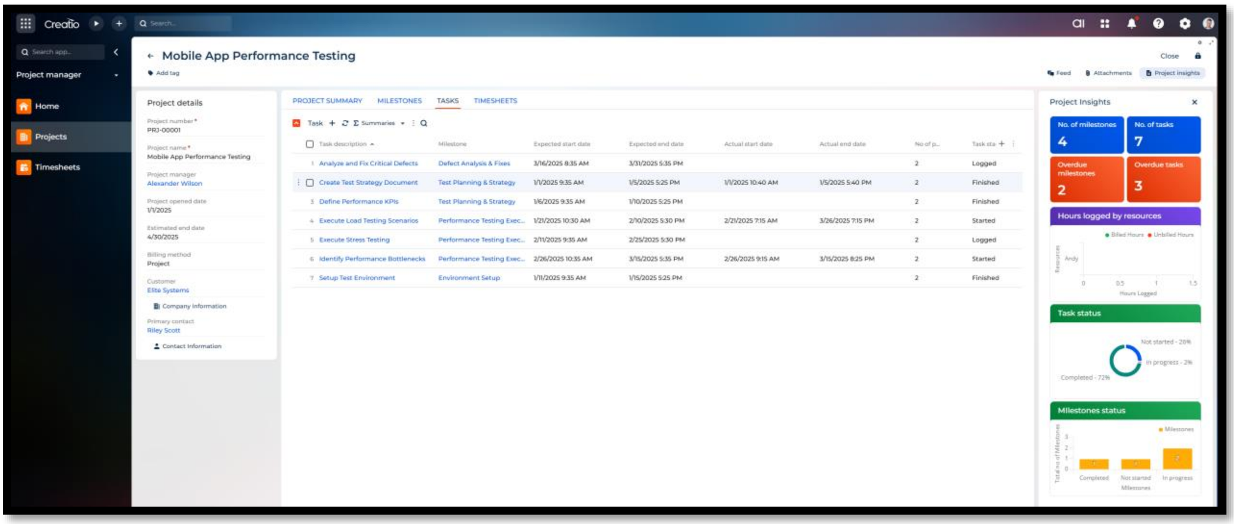


Field List and Descriptions

Sr. No.	Field Name	Short Description
1	**Project**	The project name associated with the timesheet entry. This field is mandatory.
2	**Milestone**	The specific milestone within the project related to the timesheet. This is mandatory.
3	**Task**	The task under the milestone that the user worked on. This field is mandatory.
4	**Entry User**	The user who is logging the timesheet. This field is auto populated.
5	**Entry Date**	The date and time when the timesheet entry is created. Auto-generated by the system.
6	**Time Invested**	The total time spent on the task. It is entered by the user.
7	**Billed Hours**	The portion of the invested time that is billable.
8	**Notes**	Optional notes or comments for additional context about the timesheet entry.

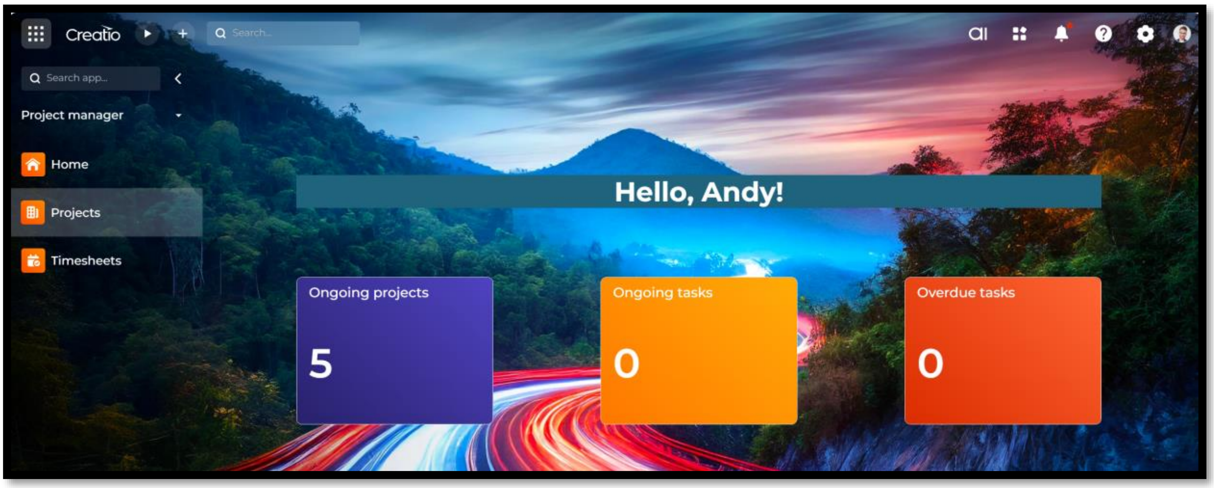
Project Insights

As part of the details of a Project, a dedicated Analysis tab is provided to give cross section of the task and timesheet data against the Project. This allows for a very thorough analysis of trends and patterns which can help to make proactive decisions on the running of the project.



Project Manager Desktop

The **Project Manager Desktop** screen serves as the main dashboard for the Creatio CRM Project Manager add-on. It provides users with a quick, at-a-glance summary of ongoing projects, tasks, and overdue activities. The interface is designed to help users efficiently navigate through key project management modules and stay updated on the status of their work.



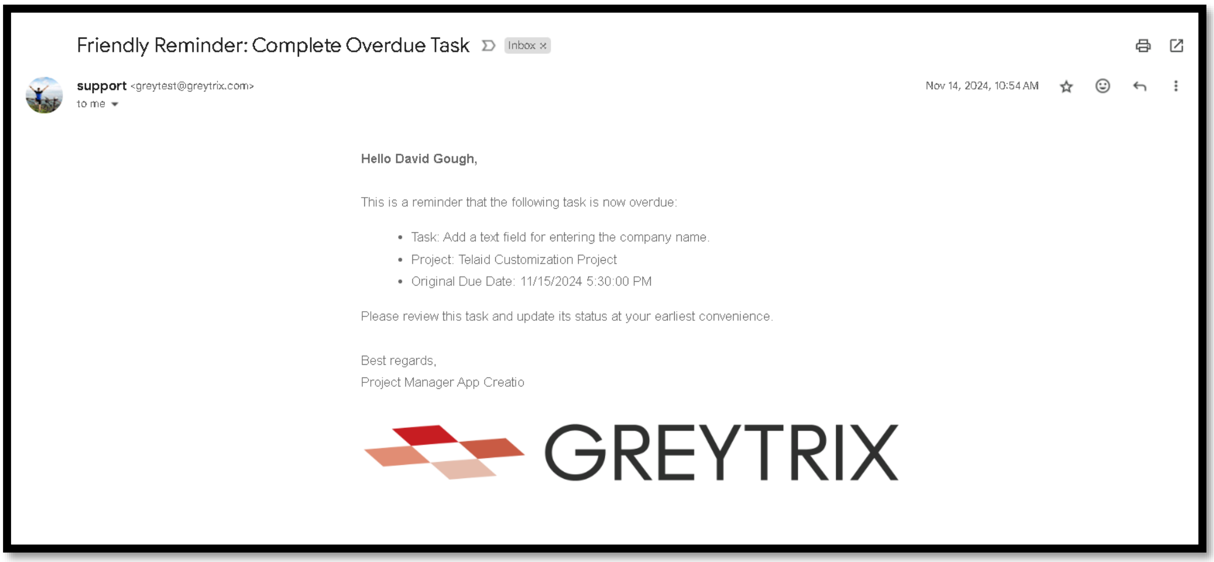
Key Features

- **Welcome Banner**
  Displays a personalized greeting with the user's name (e.g., "Hello, Ajay!"). This helps create a user-friendly and engaging experience.

- **Summary Tiles**
  - **Ongoing Projects:** Displays the number of active projects the user is currently managing or involved in.
  - **Ongoing Tasks:** Shows the number of tasks currently in progress, providing a snapshot of ongoing workload.
  - **Overdue Tasks:** Highlights the number of tasks that are overdue, helping the user prioritize critical work.

Project Workflow & Escalation

This function will check for the Project and tasks that are overdue. For any tasks that are late an Email Notification will be displayed. This will prevent the project from moving further through the workflow until these tasks have been completed.



Use Cases

The app can be utilized by organizations across various industries to streamline project workflows:

Construction Companies

Manage multiple construction projects, track milestones, allocate resources (such as labor and equipment), and monitor deadlines in real-time.

IT Services and Software Development

Oversee software development projects by breaking them into tasks, setting deadlines, and tracking developer timesheets for accurate billing.

Event Management Firms

Plan and execute events by coordinating tasks such as venue bookings, resource allocation, and timeline management.

Marketing Agencies

Track campaign progress, manage content creation workflows, and monitor resource allocation and time spent on creative tasks.

Manufacturing and Production Units

Streamline production timelines, track task execution, and ensure that milestones (e.g., prototype development or delivery dates) are met.

Professional Services Firms (e.g., Consulting, Law Firms):

Assign client-specific tasks to consultants or attorneys, track billable hours, invoicing and performance analysis.

Contact Us

For more information on this and our other products in our suite please log on to http://www.greytrix.com/. This site also contains product updates, manuals and additional technical documents.

To obtain support for your product, mail us at creatio@greytrix.com

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