Roles, user types and permissions in Easy Project

For easy onboarding and to ensure maximum efficiency, there are **4 role levels** (C-level Role, Project Management Role, Team Member, External Role) with **10 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.

ROLE	USER TYPES	PERMISSIONS	
C-LEVEL	**C-LEVEL MANAGER** **CRM – SALES DIRECTOR**	See: Manage: Features:	All system data Completely own projects, users, dashboards, templates All system features
PROJECT MANAGEMENT	**PROJECT MANAGER** **AGILE PRODUCT OWNER** **SCRUM MASTER** **HELPDESK MANAGER**	See: Manage: Features:	Data from own projects (where a member) Completely own projects, users, dashboards, templates WBS, Gantt, Scrum, Kanban, Resource management, Budgets, Finance statements, Reporting, Task tracking, Time tracking, Calendar
TEAM MEMBER	**TEAM MEMBER** **HELPDESK OPERATOR** **CRM – SALES REPRESENTATIVE**	See: Manage: Features:	Data from own project (where a member) Own tasks, own entries Task tracking, Time tracking, Calendars, Attendance planning, CRM, Helpdesk
EXTERNAL	**CRM – PARTNER SALES** **EXTERNAL**	See: Manage: Features:	Own data Manage only own tasks or Helpdesk tickets Task tracking, Time tracking, New Helpdesk ticket

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Features for user types

C-LEVEL ROLE

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

C-LEVEL MANAGER

- Budgets reports
- Payroll & invoicing reports
- Resource management and dashboard
- Sales reports
- Strategic project in WBS, Kanban or Sprint

CRM – SALES DIRECTOR

- Accounts, leads and opportunities
- Overall forecast
- Overall sales performance
- Sales activity monitoring
- Sales dashboard

PROJECT MANAGEMENT ROLE

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

- Invoicing & payroll sheets
- Project budgets
- Project Resource management
- Project WBS & Gantt
- Time reports & attendance

AGILE PRODUCT OWNER / SCRUM MASTER

- People dashboard
- Project backlogs & sprints
- Project budgets & time reports
- Scrum board
- Sprint reports

HELPDESK MANAGER

- Helpdesk dashboard
- Helpdesk statistics
- Invoicing & payroll sheets
- Lists of tickets
- People dashboard

Features for user types

TEAM MEMBER ROLE

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

- Attendance calendar
- Meeting calendar
- Personal KPIs
- Spent time calendar
- Tasks in a list or Kanban

HELPDESK OPERATOR

- Attendance calendar
- Create a new Helpdesk ticket
- Manage created ticket
- Spent time calendar
- Tickets (tasks) in list or Kanban

CRM – SALES REPRESENTATIVE

- Accounts, leads and opportunities
- My finished deals
- My forecast
- Sales activity monitoring
- Sales dashboard

EXTERNAL ROLE

Goals / Actions
Use the system in a limited mode for Helpdesk purposes or external cooperation on tasks.

Dashboard features

CRM – PARTNER SALES

- Access Knowledge base
- Accounts, leads and opportunities
- Create a new Helpdesk ticket
- Manage created ticket
- Time reports

EXTERNAL

- Create a new Helpdesk ticket
- Log spent time to project
- Manage created ticket
- Meeting calendar
- Tasks in a list