



Xrero Project

Projects, Tasks & Timesheets — User Manual

For project managers & team members

United Arab Emirates edition

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Every screen in this manual reproduces the live Xrero Project module. All names and content shown are demonstration data.

1. Introduction & how it works

Xrero Project organises your work into **projects**, each holding **tasks** that move across **stages** on a kanban board — from "To Do" to "Done". You assign tasks to people, set deadlines, log the hours spent, track progress and collaborate, all in one place. Managers see the whole picture; team members see what's theirs to do today.

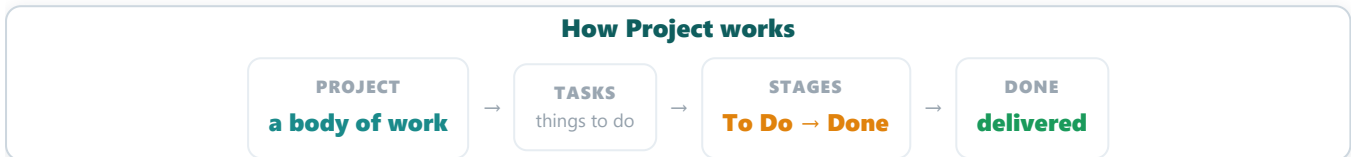


Figure 1.1 — A project holds tasks that flow through stages to completion.

This manual is for **project managers** who plan and track, and **team members** who do the work and log their time.

Good to know

The task board is a kanban — you drag a task card from one stage to the next as work progresses, just like sticky notes on a wall.

2. Getting Started & the menu

Open **Project** from the apps menu. The top menu organises everything.

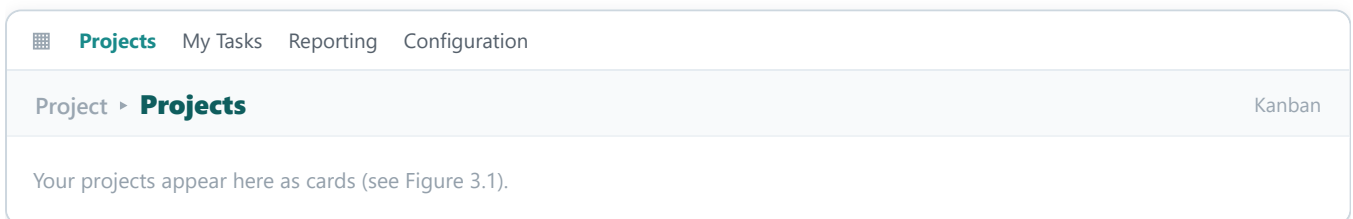


Figure 2.1 — The Project menu.

Menu	What you'll find there
Projects	All projects as cards, each opening its task board.
My Tasks	Tasks assigned to you, across all projects.
Reporting	Task and timesheet analysis.
Configuration	Stages, tags, activity types and settings.

3. The Projects overview

Menu path: Project ▶ Projects

Each project is a card showing its name, the number of tasks and quick links. The colored bar and counts tell you at a glance how busy and how complete each project is.



Figure 3.1 — Projects as cards with task counts and progress.

4. Creating a project

Click **New**, name the project, optionally link a **customer**, and choose whether to bill it or track timesheets. Your new project opens an empty task board ready for tasks.

The 'New project' form contains the following fields and values:

Project Name	Office Fit-out
Customer	Desert Rose Hotel
Allow Timesheets	✓ On
Project Manager	Layla Hassan

Figure 4.1 — Creating a project with a customer and timesheets enabled.

5. The task board

Opening a project shows its **task board** — a kanban with one column per stage. Each card is a task with its assignee's avatar, deadline and a priority star. Drag a card rightwards as work moves forward.

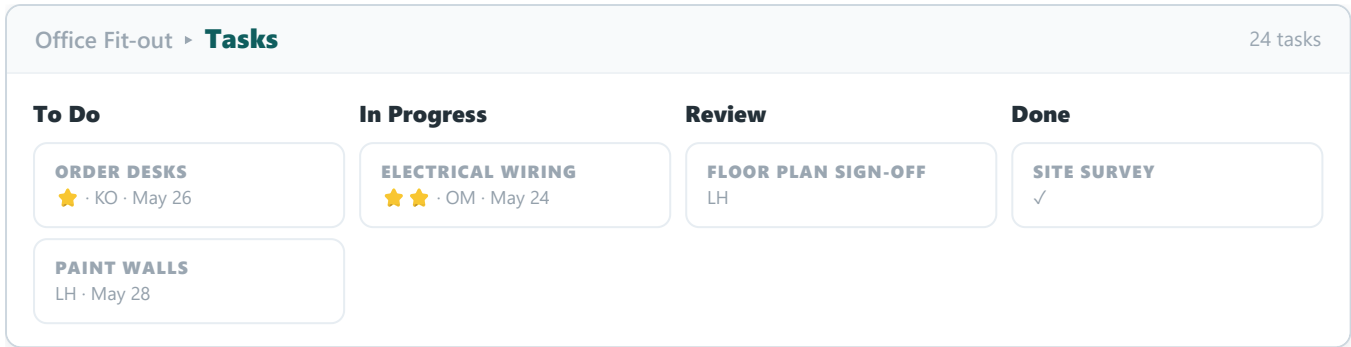


Figure 5.1 — The task board: tasks as cards, one column per stage.

6. Task stages

Stages are the columns of the board — the steps your tasks pass through. Defaults like **To Do, In Progress, Review, Done** suit most teams; rename or add your own to match your workflow.

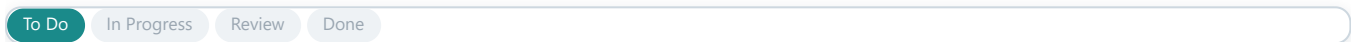


Figure 6.1 — A simple stage flow, left to right.

7. Creating a task

On the board, click **New** in any stage. Give the task a title, assign it to someone, set a deadline, and it appears as a card. That's all it takes to capture work.

- 1 On the task board, click **+** at the top of a stage.
- 2 Type the **task title**.
- 3 Set the **Assignee** and **Deadline**.
- 4 Press Enter — the card joins the board.

New task	
Title	Install signage
Assignee	Omar Mansour
Deadline	2026-05-30

Figure 7.1 — Creating a task with an assignee and deadline.

8. Inside a task

Open a card for the full task. It holds the **assignees**, **deadline**, **stage**, a rich **description**, planned hours and the **chatter**. Smart buttons link to subtasks, timesheets and any blocked/blocking tasks.

The screenshot shows a task card for 'Office Fit-out > Electrical wiring' with a status of 'In Progress'. It features smart buttons for 'Timesheets 6h' and 'Sub-tasks 2'. The assignee is 'Omar Mansour', the deadline is '2026-05-24', and the planned hours are '16h'. The priority is 'High', indicated by two stars.

Assignees	Omar Mansour
Deadline	2026-05-24
Planned Hours	16h
Priority	★★ High

Figure 8.1 — A task: assignees, deadline, stage, planned hours and smart buttons.

9. Priority & tags

Mark a task's **priority** with a star so urgent work stands out on the board, and add coloured **tags** (e.g. "Urgent", "Client", "Phase 1") to filter and group. Tags and priority make a busy board readable at a glance.

The screenshot shows a row of four items: a star icon followed by 'High priority', a blue pill-shaped tag with 'Urgent', a grey pill-shaped tag with 'Phase 1', and a green pill-shaped tag with 'Client'.

Figure 9.1 — Priority stars and tags help you triage the board.

10. Subtasks

Break a big task into **subtasks** — smaller pieces with their own assignees and deadlines. The parent task shows how many subtasks are done, so you track a chunk of work without losing the detail.

The screenshot shows a subtasks view for 'Electrical wiring > Sub-tasks' with a progress indicator '1 / 2 done'. It contains a table with the following data:

SUB-TASK	ASSIGNEE	STATE
Run conduit	Omar	Done
Fit sockets	Omar	In Progress

Figure 10.1 — Subtasks split a big task into trackable pieces.

11. Task dependencies

A task can be **blocked by** another — it can't start until the first is done. Dependencies keep work in the right order; the board warns you if you try to start a task whose blocker isn't finished.



Figure 11.1 — "Fit sockets" is blocked by "Wiring" until it's done.

12. Activities & deadlines

Schedule **activities** on a task — a call, a meeting, a to-do — with due dates, and Xrero reminds the assignee. Overdue activities turn red on the card, so nothing is forgotten.

The screenshot shows a form titled 'Schedule activity'. It has three rows of input fields. The first row is labeled 'Type' and has a dropdown menu set to 'To-Do'. The second row is labeled 'Summary' and has the text 'Confirm delivery slot'. The third row is labeled 'Due' and has the text 'Tomorrow'.

Figure 12.1 — Scheduling a reminder activity on a task.

13. Collaboration & the chatter

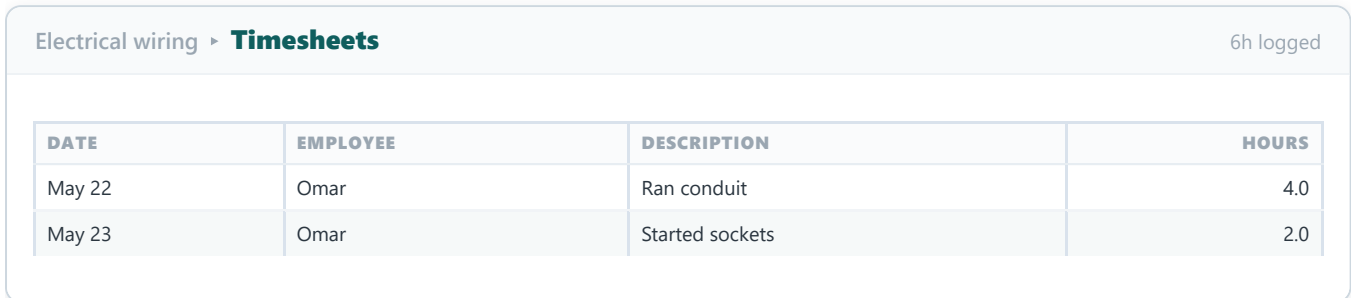
Every task has a **chatter** for teamwork: **log notes**, **@mention** a colleague to pull them in, attach files, and add **followers** who get notified of changes. The whole conversation stays on the task.

The screenshot shows a 'Chatter' section for a task titled 'Electrical wiring'. At the top, there are three buttons: 'Send message', 'Log note', and 'Followers 3'. Below these are two rows of chat messages. The first row shows a message from 'Omar @Layla' with the text 'Conduit done, starting sockets tomorrow.' The second row shows a message from 'Layla note' with the text 'Approved — keep me posted.'

Figure 13.1 — The chatter: notes, @mentions and followers on a task.

14. Timesheets — logging hours

On a task's **Timesheets** tab, log the hours you spend with a date and description. Time rolls up to the task, the project and (if billable) the customer invoice. It's how you measure effort and bill accurately.



DATE	EMPLOYEE	DESCRIPTION	HOURS
May 22	Omar	Ran conduit	4.0
May 23	Omar	Started sockets	2.0

Figure 14.1 — Logging hours against a task on the Timesheets tab.

15. Planned vs spent & progress

Compare **planned hours** with the time actually logged to see if a task is on budget. A progress bar shows percent complete; if spent exceeds planned, the task flags as over-budget so you can act early.

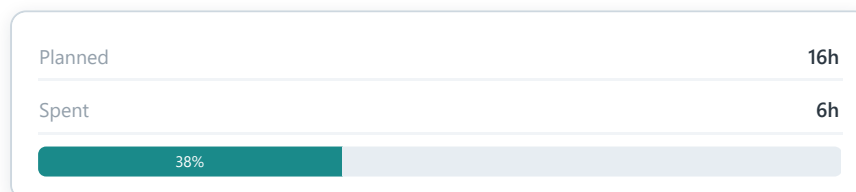


Figure 15.1 — Planned vs spent hours with a progress bar.

16. Milestones

Milestones are key dates in a project — "Design approved", "Go live". Tasks can be linked to a milestone, and the project shows whether each milestone is on track, giving managers a high-level view above the task detail.

Office Fit-out ▸ **Milestones** 3

MILESTONE	DATE	STATE
Design approved	May 10	Reached
Fit-out complete	Jun 15	On track
Handover	Jun 20	Upcoming

Figure 16.1 — Milestones give a high-level view of project progress.

17. Views — kanban, list, calendar, Gantt

Switch views to suit the question: **Kanban** for flow, **List** for bulk edits, **Calendar** for deadlines, **Gantt** for the timeline and dependencies, **Pivot/Graph** for analysis. The same tasks, seen the way you need.

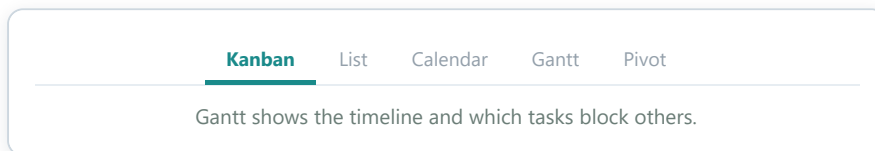


Figure 17.1 — The view switcher: kanban, list, calendar, Gantt and charts.

18. Recurring tasks

For work that repeats — a weekly report, a monthly check — set a task to **recur**. Xrero creates the next copy automatically on schedule, so routine work never falls off the board.

Recurrent	✓ On
Repeat every	1 Week
Next occurrence	Every Monday

Figure 18.1 — A recurring task that regenerates every week.

19. Project templates & stages setup

Menu path: Project ▸ Configuration

If your projects follow a pattern, save one as a **template** — its stages and starter tasks are reused for every new project of that kind. You also define the shared **stages** and **tags** here.

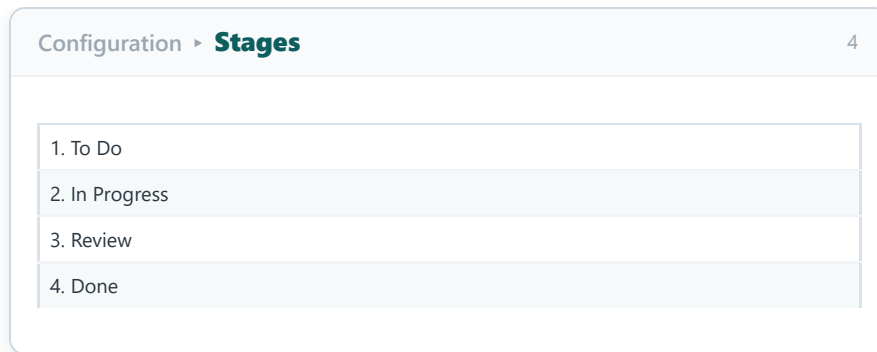


Figure 19.1 — Defining the stages every project board uses.

20. Sharing with the customer

A project can be **shared** with its customer through the portal, so they see progress and comment on their own tasks — without access to anything else in Xrero. They get a read-mostly view: task names, stages, due dates and the messages addressed to them. **Sharing changes who can see a project, so for security an administrator sets this up**; this manual only describes the feature.

TASK	STAGE	DUE
Electrical wiring	In Progress	May 24
Install signage	To Do	May 30
Site survey	Done	—

Figure 20.1 — What the customer sees in the shared portal: progress only, nothing else.

Access control
 Changing who can view or edit a project is a permission change. Have your administrator configure portal sharing — Xrero will not change access on your behalf.

21. Billing project work

For billable projects, logged **timesheets** can be turned into a customer invoice — either at an hourly rate or against a fixed-price sales order. This links Project to Sales and Accounting so the time your team records becomes revenue. (See the Sales manual for invoicing.)



Figure 21.1 — Billable hours become a customer invoice (AED).

22. Reporting

Menu path: Project ▶ Reporting

Task Analysis shows tasks by stage, assignee or project, and **Timesheet Analysis** shows hours by person, task or customer. Use them to balance workloads, watch budgets and report progress to stakeholders.



Figure 22.1 — Task Analysis: how tasks are distributed across stages.

23. My Tasks & the dashboard

Menu path: Project ▶ My Tasks

My Tasks gathers everything assigned to you across all projects, sorted by deadline and priority — your personal to-do list. The dashboard adds headline numbers: tasks due today, overdue, and hours logged this week.

Project ▶ My Tasks		today
TASK	PROJECT	DUE
Fit sockets	Office Fit-out	Today
Draft homepage	Website Revamp	Fri
Send brief	Q3 Marketing	Overdue

Figure 23.1 — My Tasks: your work across every project, by deadline.

24. Configuration

Menu path: Project ▶ Configuration

Admins enable features here: **timesheets**, **milestones**, **task dependencies**, **recurring tasks**, sub-tasks and customer portal sharing. Turn on only what your teams use to keep the interface clean — the Settings screen below holds every switch.

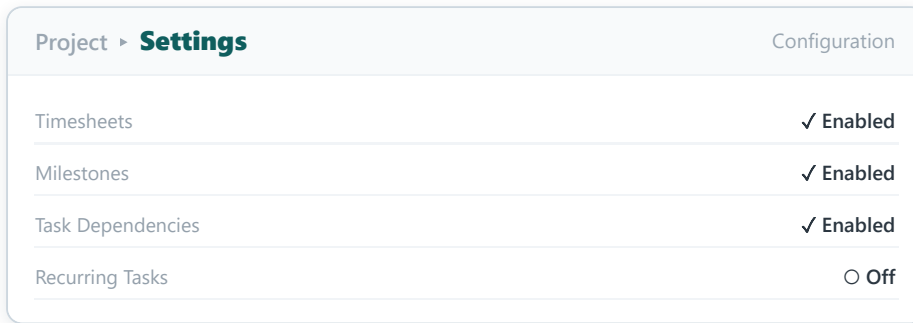


Figure 24.1 — The Project Settings screen for the features below.

Setting	Controls
Timesheets	Allow logging hours on tasks.
Milestones	Track key project dates.
Task Dependencies	Let tasks block one another.
Recurring Tasks	Auto-create repeating tasks.
Stages & Tags	The board columns and labels.

25. Tips & best practices

Projects that stay on track share these habits — summarised here, then explained.

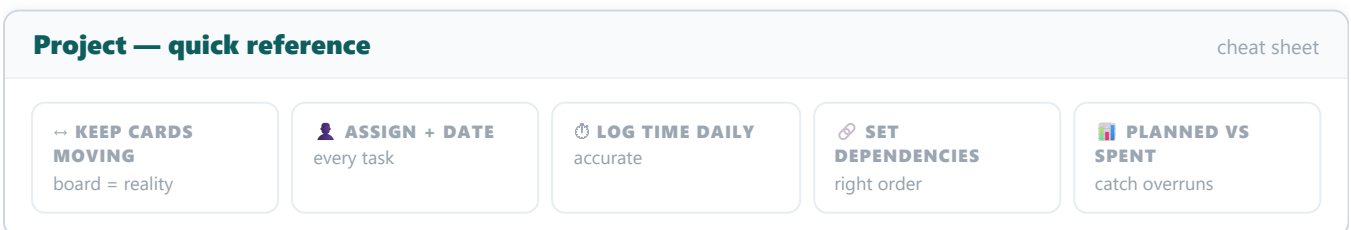


Figure 25.1 — The on-track project cheat sheet at a glance.

- **Keep cards moving** — drag tasks to the right stage so the board reflects reality.
- **Assign and date every task** — an unassigned, undated task is easily forgotten.

- **Log time as you go** — daily timesheets are accurate; week-end guesses aren't.
- **Use subtasks for big jobs** — smaller pieces are easier to track and share.
- **Set dependencies** — stop work starting out of order.
- **Watch planned vs spent** — catch over-budget tasks early.

26. Glossary

The structure in four words: a **project** holds **tasks** (split into **subtasks**) that flow through **stages** to Done.

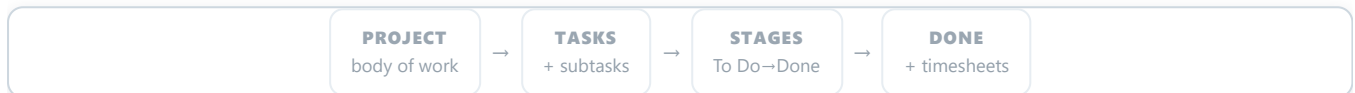


Figure 26.1 — How the glossary terms fit together.

Term	Meaning
Project	A body of work containing tasks.
Task	A single piece of work on the board.
Stage	A column the task moves through (To Do...Done).
Subtask	A smaller piece of a parent task.
Dependency	A task that must finish before another starts.
Timesheet	Hours logged against a task.
Planned hours	The time budgeted for a task.
Milestone	A key date in the project.
Followers	People notified of a task's changes.
Gantt	A timeline view of tasks and dependencies.

27. FAQ & troubleshooting

The questions teams ask most, with the quick answer:

Troubleshooting		common fixes
QUESTION	QUICK ANSWER	
Move a task forward?	Drag to the next column	
See only my work?	Open My Tasks	
Hours not on invoice?	Project must be billable	
Repeat a task?	Turn on Recurrent	

Figure 27.1 — The most common project questions and their quick fix.

How do I move a task forward?

Drag its card to the next stage column on the board, or change the stage inside the task.

Where do I see only my work?

Open **My Tasks** — it lists everything assigned to you across all projects.

My timesheet hours aren't on the invoice.

Check the project is set to **billable** and the task is linked to the sales order; only then do hours flow to invoicing.

Can a task wait for another?

Yes — set it as **blocked by** the prerequisite task; it can't start until that one is done.

How do I repeat a weekly task?

Turn on **Recurrent** on the task and set the interval; Xrero creates each new copy automatically.

Can a customer see the project?

Yes, via portal sharing — but because that's an access change, ask your administrator to set it up.

Need help?

Contact your Xrero administrator or visit xrero.com.