Application terminology standardization

Revision of the most used terms in application since version 13

Introduction

For clear understanding of our application and navigation within, we felt it crucial to implement a **standardized terminology** for various aspects of the product, which were previously not clearly named.

These terms will be gradually spread throughout documentation and all other resources.
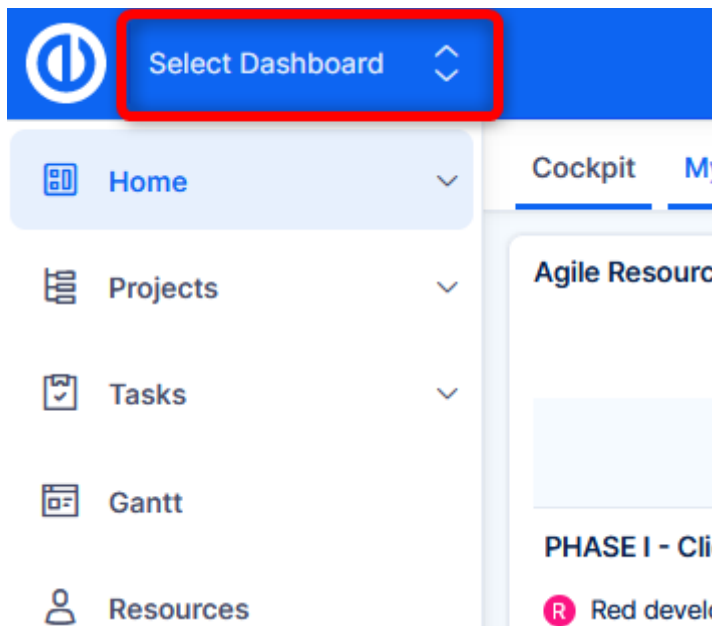
Here is a summary. Other details will be provided in v13 release notes and in the Owner's manual for v13.
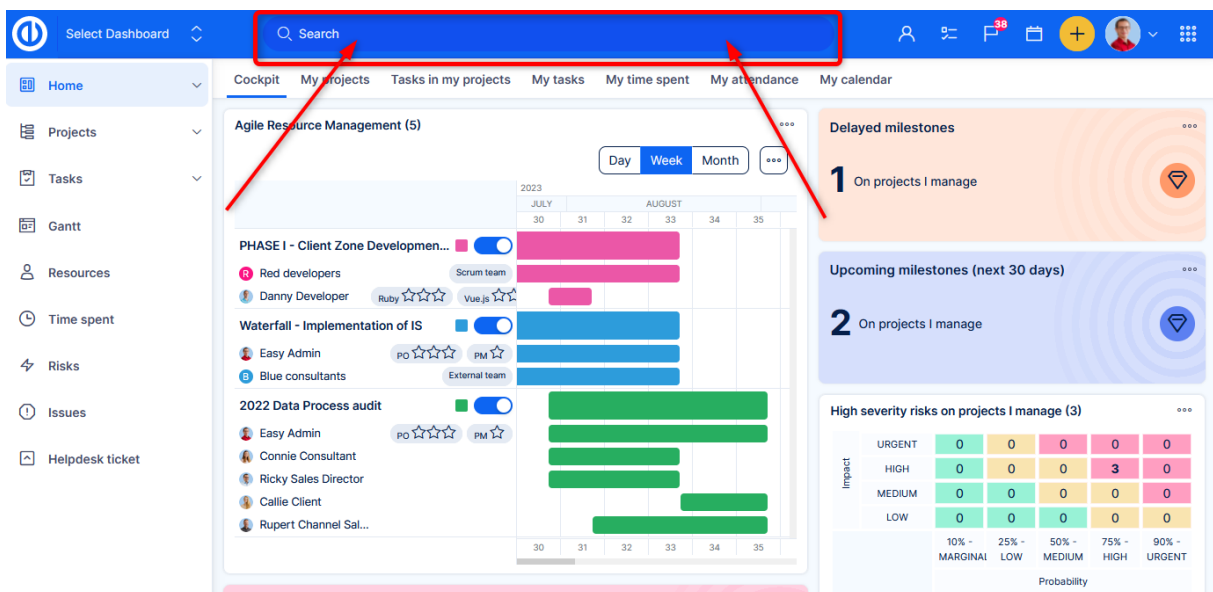
Navigation (menus, bars, etc.)

**Left menu** (previously called *Main menu*, *Custom menu*) - the menu in the left bar
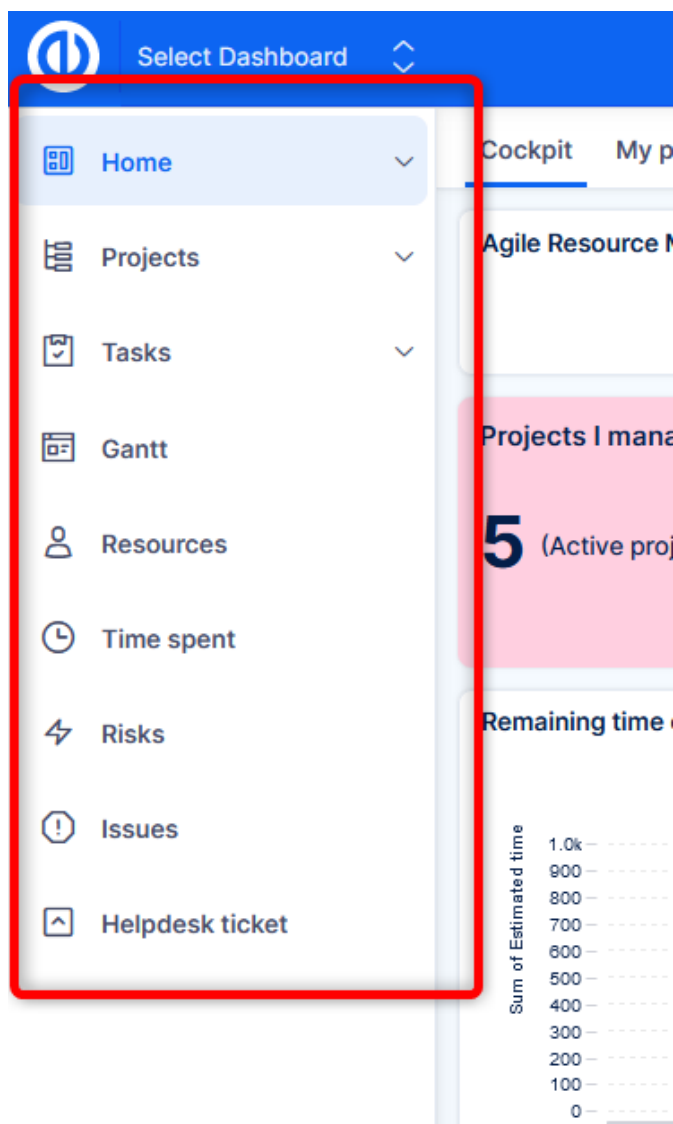
Select Dashboard - a new feature in v13

Full-text search - there are various searches in the application, this is the one in the top bar. It should be clearly distinguished by a descriptive name – "full-text" search is the proper terminus technicus.
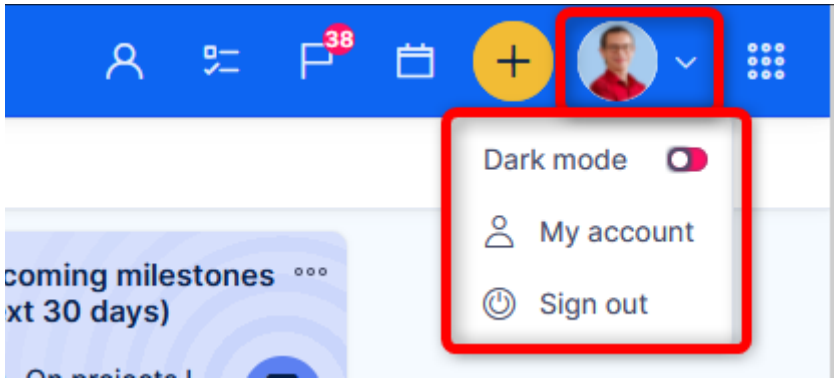

Toolkit - functional buttons in the top bar (to-do list, activity feed, calendar,…). In older versions these were located in the right sidebar. The right sidebar has been removed in v13, as is explained in the release notes.
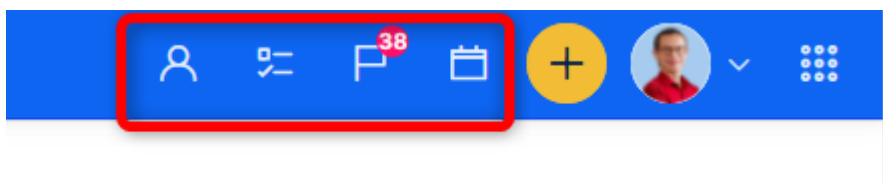

Plus button - Button in the top bar for creating new entities (task, project, logging time, etc.)

**My profile** - Avatar with a submenu shown in the top bar

Global menu (previously called *More menu*, *Hamburger menu*, *Ellipsis*, *Three dots*,…) - this menu badly needed a single term. Menu in the top right corner, which contains access to various "global" dashboards and native pages (such as time reports or milestones, budgets, etc.).
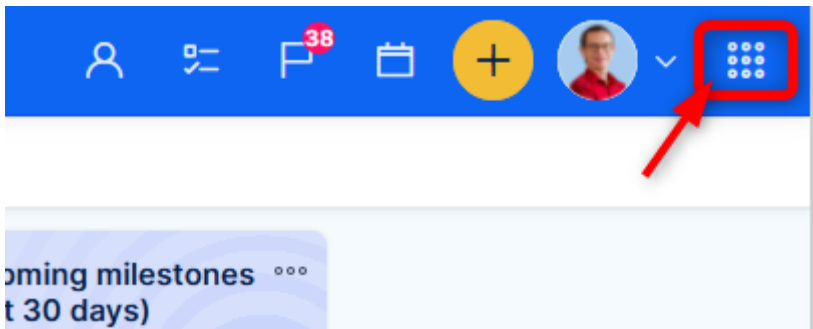
Dashboards

Dashboards (previously called overview page, customizable page) – pages that can be customized are widely known as "Dashboards". It was made official in our applications as well.
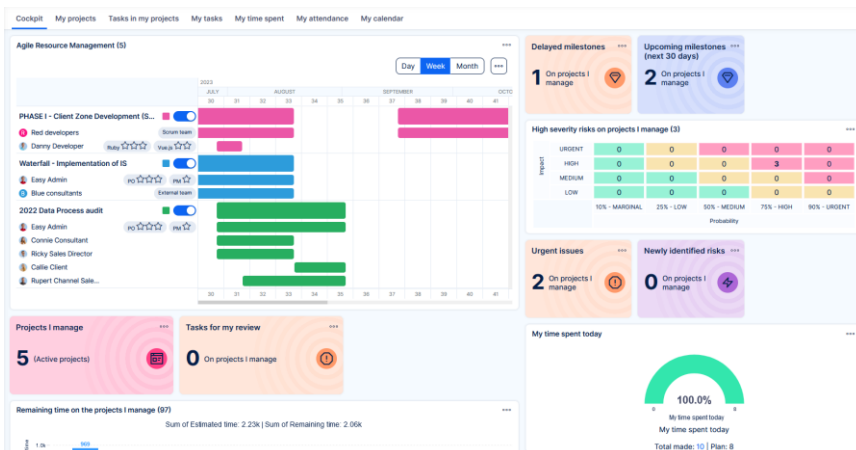
There are different types of dashboards:

My dashboard (previously called *Home*, *Homepage*, *My page*) - the dashboard which you access by clicking or the logo in the top left corner. The first page after you log in.

Project dashboard (previously called *Project overview page*) - the first page when you enter a specific project

Feature dashboard (previously called *Built-in page*) - the pages that are access points for various features, for example via global menu (Help desk, Time reports, Budgets, CRM, etc.)

Custom dashboard (previously called *Easy pages*) - this type didn't really have its own name in the past. Custom dashboards are created in Administration >> Dashboard customisation >> New dashboard. They are not tied to any certain feature, or project, or user. You are free to use them for any purpose you wish.

Widget (previously called *Page module*) - the general name for each element that you can add to a dashboard, e.g. noticeboard, chart, list, trend, gauge, etc.

| Cockpit | My projects | Tasks in my projects | My tasks | My time spent | My attendance | My calendar |

Spent time calendar

◄   30 / July 2023   ►

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	23 Jul	24 Jul	25 Jul	26 Jul	27 Jul	28 Jul	29 Jul
30	8.00 h	5.00 h	10.00 h	0.00 h	0.00 h	0.00 h	0.00 h
			Log time				

My time spent - this month (12)

✓	User ⇕	Date ▼	Project ⇕	Task ⇕	Activity ⇕	Comment	Spent time ⇕	
	Total:						56.00 h	
⊞	27 3 10.71%						6.00 h	
⊞	28 2 19.64%						11.00 h	
⊞	29 3 42.86%						24.00 h	
⊞	30 4 26.79%						15.00 h	

My time spent

100.0%

0   8

My time spent

My time spent

| Today | This week | This month |

Total made: 10 | Plan: 8

My time spent - last month (5)

✓	User ⇕	Date ⇕	Project ⇕	Task ⇕	Activity ⇕	Comment	Spent time ⇕	
	Total:						18.50 h	
⊞	22 1 54.05%						10.00 h	
⊞	25 1 5.41%						1.00 h	
⊞	26 3 40.54%						7.50 h	

Spent time Today: 10.00 h

Today		10.00 h	
Work	KANBAN - software development User Story #778: Simplification of imports	8.00 h	✏ 🗑
Work	Client Zone Development and Implementation Issue #1606: External contract	1.00 h	✏ 🗑

Dashboard tabs (previously called *Tabs*) - since there may be various tabs in the application (and in your web browser), it made sense to add the adjective to the tabs that may be used in dashboards

Button **Customise** (previously called *Customize this page*) - text on the button for editing a dashboard. The term "page" is no longer used, and "Customise this dashboard" is unnecessarily long.

Easy Query

Easy Query is a widely use component throughout the application. By this term you can understand any dataset which you can control via buttons *Filters* and *Options,* e.g. task list.

The component is very universal, can be shown in various outputs (list, chart, tiles,…) which is why it would not make sense to call it by a name of some output type, e.g. "list". We feel it important to also clarify the terminology of the possible outputs of easy query:

List - the most used table view, in form of a table or spreadsheet. Also available as a widget.

	Subject	Project	Assignee	Status	Due date	Estimated time
Total:						**3,362.00 h**
☐ ✉	Save button not functional	KANBAN - software development		In progress		20.00 h
☐ ✉	Not enough space for new servers in our datacenter	Client Zone Development and Implementation		In progress	---	0.00 h
☐ ✉	Can't delete file	Client helpdesk project		In progress	26 Jul 2023	0.00 h
☐ ✉	Key programmer just left	Waterfall - Implementation of IS		In progress	01 Apr 2024	0.00 h
☐ ✉	Remove an obsolete function	KANBAN - software development		Assigned		15.00 h
☐ ✉	Delay of notifications	KANBAN - software development		In progress		18.00 h
☐ ✉	Full text search optimization	KANBAN - software development		New	---	15.00 h
☐ ✉	Addition of API for advanced entities	KANBAN - software development		New	---	30.00 h

Task list (200) ⚠ Project issues 4 🗓 Tasks to complete this week 11   ▽ Filters | default ⚙ Options Subject 🔍

Chart - bar, pie and line charts are available. Also available as separate widgets, by chart type.

Number of items: 200
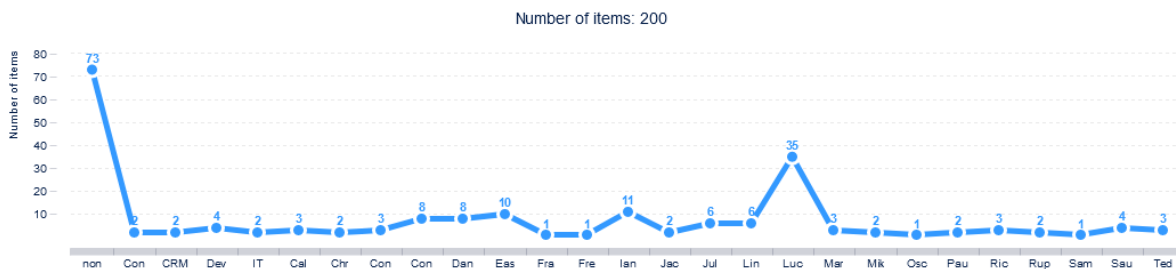
Pivot table (previously called *Report*) - the previous name "Report" can be used very generally; thus it was decided to use the widely recognized technical term for this type of output, (for example in MS Excel, or other spreadsheet editors). Also available as a widget.

		Task	Issue	Deliverable	User Story	Bug	Ticket	Total
Urgent	In progress	-	2	-	-	1	1	4
High	New	7	-	-	3	1	-	11
	Assigned	-	-	-	1	1	-	2
	In progress	-	2	-	1	1	1	5
	Supervisor review	-	-	-	-	2	-	2
	Returned by client	-	-	-	-	-	1	1
Normal	New	126	-	9	8	2	4	149
	Assigned	-	-	-	2	-	1	3
	In progress	11	-	1	-	-	-	12
	Testing	-	-	-	1	-	-	1
	Supervisor review	3	-	-	2	-	-	5
Low	New	-	-	-	-	-	2	2
	Assigned	-	-	-	-	-	2	2
	In progress	-	-	-	-	-	1	1
Total		147	4	10	18	8	13	200

Tiles - a specific view to see more data in a small number of items.

Issue #1605: Not enough space for new servers in our datacenter

Subject	Not enough space for new servers in our datacenter
Project	Client Zone Development and Implementation
Assignee	Easy Admin
Priority	Urgent

PDF   iCal   QR

Issue #1523: Key programmer just left

Subject	Key programmer just left
Project	Waterfall - Implementation of IS
Assignee	Paul Project Manager
Priority	Urgent

PDF   iCal   QR

Issue #1606: External contract is expiring

Subject	External contract is expiring
Project	Client Zone Development and Implementation
Assignee	
Priority	High

PDF   iCal   QR

Issue #1524: Current reporting module is unsufficient

Subject	Current reporting module is unsufficient
Project	Waterfall - Implementation of IS
Assignee	Paul Project Manager
Priority	High

PDF   iCal   QR

Calendar - only for tasks (Redmine based)

16	17	18	19	20	21	22
29			▶ Waterfall - Implementation of IS - Task #577: 2.3. Review and consult rec...			◀ Building a house - Deliverable #1613: Planing and Admin ◀ Building a house - Task #1620: Permits ▶ KANBAN - software development - User Story #782: New type of charts	▶ Legal - Task #1913: Review NDA

23	24	25	26	27	28	29
	◀ Waterfall - Implementation of IS - Task #577: 2.3. Review and consult rec...			◀ Client helpdesk project - Ticket #2022: Can't delete file ▶◀ .Help desk - Ticket #2016: Online payment not working ◀ Client helpdesk project - Ticket #2023: Troubles with licence key ▶◀ Waterfall - Implementation of IS - Task #578: 2.4. Finalize protocol with... ▶ Anonymization Requests - Task #1749: Request registration and ve... ▶ 2021 Data Process audit - Task #1770: GDPR legislation audit	◀ Anonymization Requests - Task #1749: Request registration and ve... ▶◀ 2021 Data Process audit - Task #1773: Update database list with a... ▶◀ 2021 Data Process audit - Task #1774: Risk assesment ◀ 2022 Data Process audit - Task #1776: GDPR legislation audit ▶ KANBAN - software development - User Story #781: New welcome page ▶ KANBAN - software development - User Story #766: Implementation of a new set...	◀ 2021 Data Process audit - Task #1771: Update Data Processing Manual ◀ 2021 Data Process audit - Task #1775: Update anonymization process ▶◀ 2022 Data Process audit - Task #1778: New and obsolete DB audit ▶◀ 2022 Data Process audit - Task #1779: Update database list with a... ▶◀ 2022 Data Process audit - Task #1780: Risk assesment ▶ KANBAN - software development - User Story #776: Caldav synchronization	◀ Team Building September - Task #1935: Define date questionnaire ▶ Waterfall - Implementation of IS - Task #580: 3.1.1. Roles and permissions ▶ Waterfall - Implementation of IS - Task #579: 3.1. Actual application set... ▶ Waterfall - Implementation of IS - Deliverable #1556: 3. Configured system

Kanban - only for tasks. Also available as a widget (Custom kanban board)

Bugs

Reported (0)	Work in progress (0)	Testing (0)	Done (0)
Reported	**Work in progress**	**Testing**	
#765 - Remove an obsolete function Bug	#774 - Save button not functional Bug		
#770 - Text overflowing Bug	#769 - Delay of notifications Bug		
#773 - Screen flickering on a specific view Bug			

Swimlane: No swimlane

Dynamic filters - this term has already existed, here it is only for completeness. This is a special mode of list view, available for tasks, projects, spent time, users, and some other components. It is best used for filtering = finding data. Since this component was heavily presented as "Dynamic filters" since its introduction in version 11, there was no need to change it.

Project related changes

Project card (previously called *Project controls*) - a widget available on project dashboard. The previous term "project controls" did not fit well for this widget and is much clearer for another place → see below

Project controls - the right-most button in project menu, under which you can find submenu (history, members, modules, etc.)

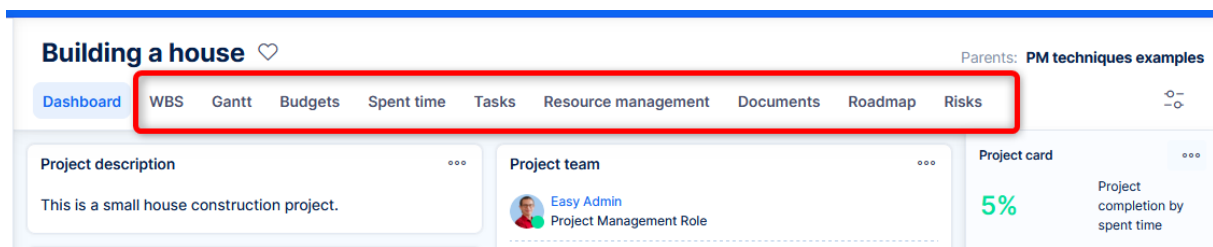~~Settings - information~~ → **Edit project** - the first option under the project controls was previously called "Information". This term was misleading = it was not clear for the users where to go to edit the project.
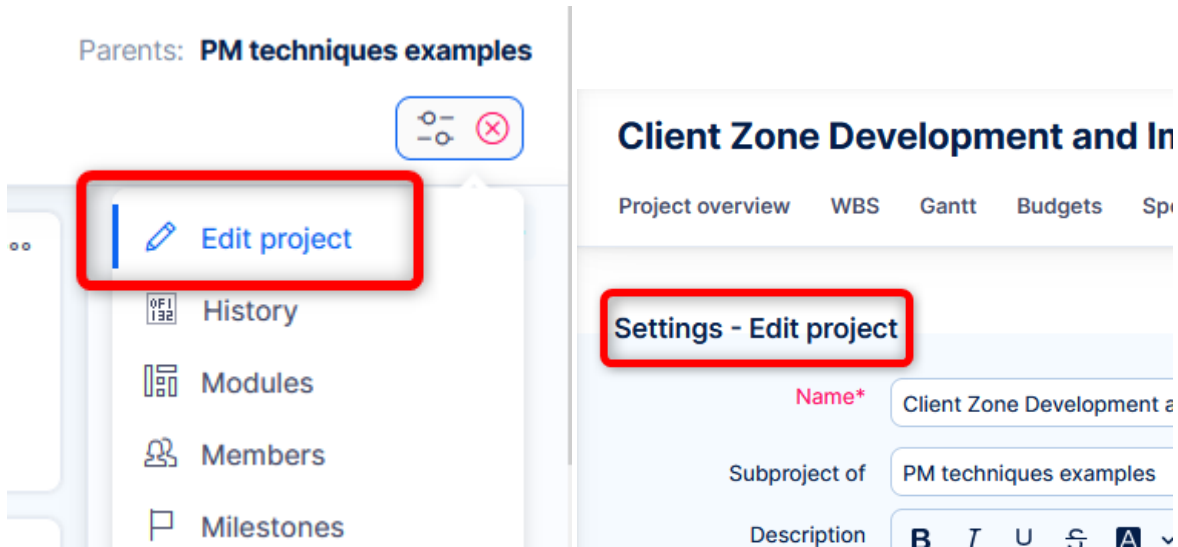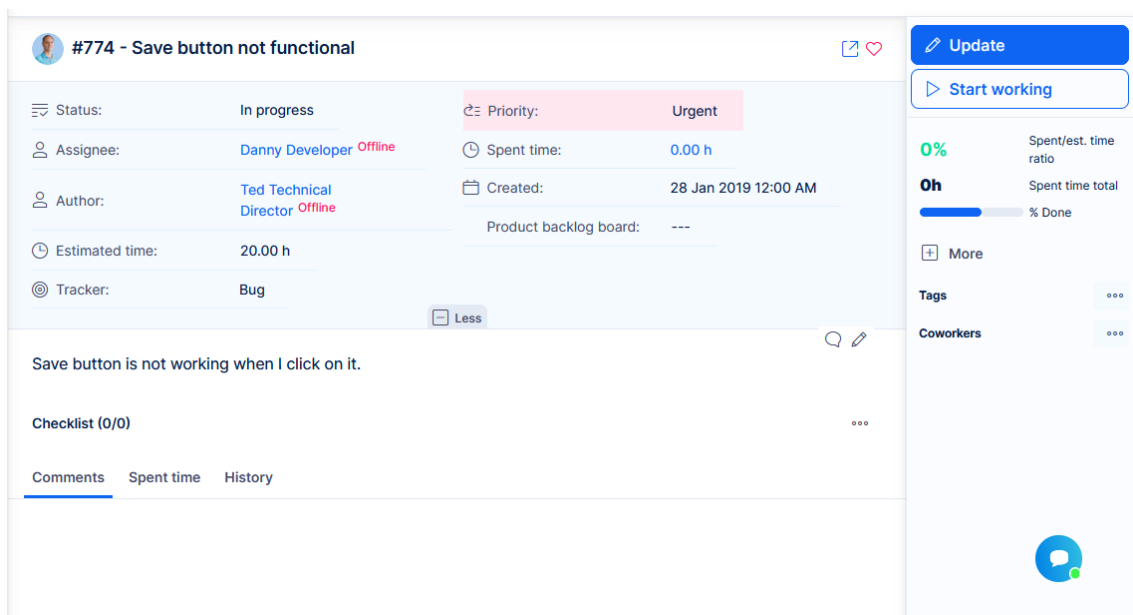

Project modules - the tabs in the project menu representing various functional areas concerning the project (Tasks, WBS, Gantt, Roadmap, etc.)

Various

Task detail - the page representing a single task. This term was used in some documentation, but it was never properly established as terminus technicus

Quick task editor - a special view of the task in a pop-up window, which allows most of the operations with the task, including adding a comment, editing attributes, logging time. A small number of operations are technically not possible from this mode.

You can find this view in WBS, Gantt, Kanban, but is also accessible from task detail.

Side bar - generally, this term is used for the collapsible right section on various pages. You can find it on task detail, project list, task list, edit project, and many more.

Side bar on task detail

Side bar on task list