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.

O Select Dashboard	$\hat{\mathbf{x}}$	Q Search						ዶ	9 2 F	- <mark>38</mark> É	• +)~ ::::
E Home	~	Cockpit My projects	Tasks in my projects	My tasks	My time spent	My attendance	My cale	endar					
冒 Projects	~	Agile Resource Managem	ent (5)				Delay	yed milesto	nes				000
🕄 Tasks	~	/		2023 JULY	Day Week	Month	1 •)n projects I	manage				
Gantt		PHASE I - Client Zone De	velopmen 📕 🔵	30 31	32 33	34 35	•						
A Resources		Red developers Danny Developer	Scrum team uby 값값값 Vue.js 값값				Upco	oming miles	tones (ne	ext 30 c	lays)		000
C Time spent		Waterfall - Implementatio	on of IS				2	On projects I	l manage				
47 Risks		 Easy Admin Blue consultants 	PO 값값값 PM 값 External team										
() Issues		2022 Data Process audit	Ро 计计计 PM 计				High	severity risk	s on proje	cts I ma	nage (3)		
 Helpdesk ticket 		 Easy Admin Connie Consultant Ricky Sales Director Conting Object 	90 시시시 PM 시				Impact	URGENT HIGH MEDIUM	0 0 0	0 0 0	0 0 0	0 3 0	0 0 0
		 Callie Client Rupert Channel Sal 						LOW	0	0	0	0	0 90% -
				30 31	32 33	34 35			10% - MARGINAI	25% - LOW	50% - MEDIUM Probability	75% - HIGH	90% - URGENT

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.

gle Resource Management (5)	Delayed miles		Upcoming mile (next 30 days)			
2023 AAX AUCUST DIFTINENT CO 300 231 30 333 34 35 36 37 38 38 40 41	1 On projects manage		2 On projects manage			
HASE I - Client Zone Development (S 📕 🚺	High severity ri	ke en orejeste l	manage (2)			
Red developers Bourn Nam Danny Developer และ นำนำนำ						
	URGENT	0	0	0	0	0
aterfail - Implementation of IS	S HIGH	0	0	0	3	0
Easy Admin Po นิกมีนี้นี้ PM นิ	MEDIUM	0	0	0	0	0
Blue consultants External team	LOW	0	0	0	0	0
122 Data Process audit		10% - MAROINA	L 25% - LOW	50% - MEDIUM Probability	75% - HIOH	90% - UROENT
Easy Admin PO 12121 PM 12				Probability		
Connie Consultant	Urgent issues		Newly identifie	d ricks and		
Ricky Sales Director	Orgent issues		Newly Identifie	outloks		
Rupert Channel Sale	2 On project		O On project	51		
Store Store <th< td=""><td>∠ manage</td><td></td><td>U manage</td><td></td><td></td><td></td></th<>	∠ manage		U manage			
ojects I manage *** Tasks for my review ***						
ojects i manage hasks tor my review	My time spent t	oday				
(Active projects) (C) On projects I manage						
(Active projects)						
			100.	0%		
maning one of the projects (manage (or)			o My time sp	a sent today		
Sum of Estimated time: 2.23k Sum of Remaining time: 2.06k			My time spi	ant today		

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.

Cock	cpit My projects	Tasks in my projects	My tasks My tim	ne spent My attendand	e My calendar		
Spen	nt 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 ∫⊕ v Log time	0.00 h	0.00 h	0.00 h	0.00 h
My ti	ime spent - this month	(12)		••	• My time spe	nt	000
~	User ÷ Date *	Project 🗘 🛛 Task 🗘 🛛 Act	tivity 🗘 Commen t	Spent ÷ time			
	Total:			56.00 h			
+	27 3 10.71%			6.00 h		100.0%	
+	28 2 19.64%			11.00 h		o Mytime spent	8
+	29 3 42.86%			24.00 h		My time spent	
÷	30 4 26.79%			15.00 h	Today This	week This month Total made: 10 Pla	in: 8
My ti	ime spent - last month	(5)		••	Spent time T	ōday: 10.00 h	000
~	User ÷ Date *	Project 🗘 🛛 Task 🗘 🛛 Act	tivity 🗘 Commen	Spent ≑ time	Today		10.00 h
	Total:			18.50 h	d	ANBAN - software evelopment User Story	l an l
Ŧ	22 1 54.05%			10.00 h	Work #	778: Simplification of nports	8.00 h 🚆
+	25 1 5.41%			1.00 h	с	lient Zone Development	
Ŧ	26 3 40.54%			7.50 h	Work	nd 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

Cockpit	My projects	Tasks in my	projects	My ta	isks I	My tim	e spent	My att	endance	My calend	ar			
Spent ti	ime calendar													
•											30) / July 2023		
	Su	inday		P	Monday				Tuesday			Wednesday		
30	23 Jul 8.	.00 h	24 Ju		5.00 h		2	25 Jul	10.00 h		26 Ji	ll 0.00 h		27
								<u>∫⊕</u> Log time	•					
My time	e spent - this mo	nth (12)											000	
/	User 🌲	Date -	Project	÷	Task	÷	Activity	у	Commen	t		Spent time 🌻		
Т	otal:										56.00) h		
+	27 3 10.71%	S										6.00 h		
+	28 2 19.649											11.00 h		

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.

	+ Development 2 items 10.53 %
	+ Delivery Request 2 items 10.53 %
	+ Documentation 2 items 10.53 %
÷	Customise

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.

Q	Search					۶ (२ 定	P ³⁷	Ö	+ 🔹 ~
Task list	(200) A Project issues 4	Tasks to complete this week	ı D	Filters	default	-o- -o- Options	Subject			Q,
\checkmark	Subject	Project	Assigne	e ÷	Status	\$	Due	date	÷	Estimated time
Total:										3,362.00 h
	Save button not functiona	KANBAN - software development	۲		In prog	ress				20.00 h

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:

ask lis	t (200) 🛆 Project issues 4 📋 Tas	ks to complete this week 11		Filters default	Options Subject	Q
/	Subject	Project	Assignee	≑ Status	Due date	Estimated tim
Total	:					3,362.00
	Save button not functional	KANBAN - software development	۲	In progress		20.00
	Not enough space for new servers in our datacenter	Client Zone Development and Implementation	2	In progress		0.00
	Can't delete file	Client helpdesk project	2	In progress	26 Jul 2023	0.00
	Key programmer just left	Waterfall - Implementation of IS		In progress	01 Apr 2024	0.00
) 🖂	Remove an obsolete function	KANBAN - software development	۲	Assigned		15.00
	Delay of notifications	KANBAN - software development	۲	In progress		18.00
] 🖂	Full text search optimization	KANBAN - software development		New		15.00
) 🖂	Addition of API for advanced entities	KANBAN - software development		New		30.00

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

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



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.

		Tests	Innue	Delivershie	Lines Chami	Dura	Ticket	Tatal
		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 #1606: External contract is expirin				
servers in o Subject	Not enough space for new servers	Subject Project	Key programmer just left Waterfall - Implementation of IS	Subject Project	External contract is expiring Client Zone Development and Implementation			
Project	Client Zone Development and Implementation	Assignee Priority	Paul Project Manager Urgent	Assignee Priority	High			
Assignee	Easy Admin		■PDF ⊟iCal 믞QR		-			
Priority	Urgent				🖺 PDF 📛 iCal 🔡 Q			
	Image: PDF □ iCal == QR							
	4: Current reporting module is							
unsufficien Subject	Current reporting module is unsufficient							
	Current reporting module is							
Subject	Current reporting module is unsufficient							
Subject Project	Current reporting module is unsufficient Waterfall - Implementation of IS							
Subject Project Assignee	Current reporting module is unsufficient Waterfall - Implementation of IS							

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 ree			 Client helpdesk project - Ticket #2022: Can't delete file I-Help desk - Tieket #2016: Online payment not working Client helpdesk project - Ticket #2023: Troubles with licence key Implementation of IS - Task #578: 2.4. Finalize protecel 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 welcoment - 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 #1778: 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)

gs			Swimlane:	No
Reported (0)		Work in progress (0)		
Reported		Work in progress		
#765 - Remove an obsolete function Bug	— ••• #77 Bug	74 - Save button not functional g	- 000	
(8)	-552 🙎		-127	
#770 - Text overflowing Bug	— ••• #76 Bug	769 - Delay of notifications g	_ 000	
	-552 🔊		-127-	
#773 - Screen flickering on a specific view Bug	- *** 501			

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 \rightarrow see below

Project card		000
5%	Project completion spent time	by
830h	Estimated ti total	me
45h	Overall sper time	nt
05 Apr 2024	Due date	
11 May 2023	Start date	
-	Progress	
0	Indicator	
Regular	Priority	
Tags		000
▷ Overall acti + New subpred	-	
+ New subpro	ject from	
G Close		
? Add to Help	desk	

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



Settings – information \rightarrow 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.)

Building	g a ho	use 🤇	>						Parents	PM tech	niques examples
Dashboard	WBS	Gantt	Budgets	Spent time	Tasks	Resource management	Documents	Roadmap	Risks		-0-
Project descr	iption			000	F	Project team		00	Proje	ct card	000
This is a sma	ll house c	onstructio	on project.			Easy Admin Project Management Role			5%	5	Project completion by spent time

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

🌔 #774 - Save but	[2 🛇	🖉 Update			
= Status:	In progress	d∃ Priority: Urgent		▷ Start working	
Assignee:	Danny Developer Offline	Spent time: 0.00 h		0%	Spent/est. time ratio
Author:	Ted Technical Director Offline	Created: 28 Jan 2	2019 12:00 AM	Oh	Spent time total
Estimated time:	20.00 h	Product backlog board:		+ More	% Done
Tracker:	Bug			Tags	000
Save button is not work	king when I click on it	- Less	90	Coworkers	000
Checklist (0/0)	ang when reliek on it.		000		
Comments Spent time					
					Q
					-

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.

Save button not functional		\heartsuit	#774 X	
PROGRESS SPEN	T TIME RATIO		Details	
STATUS In progress	PRIORITY Urgent		Description Comments	
ASSIGNEE Danny Developer	AUTHOR Ted Technical Director		Attachments Spent time	>
CREATED 28 Jan 2019	ESTIMATED TIME 20.00 h		Product backlog items	9
SPENT TIME 0.00 h	tracker Bug		Coworkers + Checklists	
PROJECT KANBAN - software development	PRODUCT BACKLOG BOARD		Tags +	
Description			Sub tasks +	2
Save button is not working when I click on it.			Related tasks +	
₽ Comments			Сору	
Add a comment			Delete task	
SHOW ALL ACTIVITIES			Move	
0 Attachments				
New file	Maximum attachment size: 5.0 MB			

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

More Tags		-0-
0% Spent/est. time ratio Oh Spent time total % Done More Tags	🖉 Updat	te
0% ratio 0h Spent time total % Done + More Tags ••••	⊳ Start	working
More Tags	0%	
+ More	Oh	Spent time total
Tags ••••		% Done
	+ More	
Coworkers	Tags	000
001011013	Coworkers	000

Side bar on task list

