

REBEL SOFTWARE · RebelPSA

Projects User Guide

Checklists, Phases, Gantt & the Portfolio Dashboard

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Contents

- 1.** About This Guide
- 2.** Project Modes: Checklist vs. Standard
- 3.** The Project List
- 4.** Working a Checklist Project
- 5.** Working a Standard Project
- 6.** Every Task Is a Ticket
- 7.** Project Templates
- 8.** The Portfolio Dashboard
- 9.** Permissions: Who Can Do What
- 10.** Client Portal Visibility
- 11.** Reports & Dashboards
- 12.** Common Workflows
- 13.** Quick Reference & Glossary

1. About This Guide

This guide covers the Projects module of RebelPSA — how to run everything from a simple onboarding checklist to a multi-phase Gantt-scheduled engagement, and how project managers get a bird's-eye view across every active project on the Portfolio Dashboard.

The core idea behind Projects is simple: every task is a ticket. A project doesn't run a separate task system alongside your Help Desk — it organizes existing tickets into phases, adds scheduling and resource metadata on top, and everything a ticket already does (time tracking, billing, SLA (Service Level Agreement), communication) comes along for free.

Tip. *Projects is one of RebelPSA's newer modules and is actively growing. Today it covers Checklist and Standard project modes in full depth. A more advanced Enterprise mode that includes critical-path scheduling, cross-project dependencies, and an AI planning co-pilot is on the roadmap; this guide focuses on what's available to use right now.*

2. Project Modes: Checklist vs. Standard

Mode	Best For
Checklist	Sales onboarding plays, new client setup, recurring procedures, compliance checks — any workflow best run as a straightforward, ordered list of steps.
Standard	IT deployments, infrastructure migrations, application rollouts, and any multi-resource engagement that benefits from phases, a Gantt schedule, and budget tracking.

You choose a project's mode when you create it, and every mode is built on the exact same foundation underneath — phases, tasks, and tickets — so switching your mental model between a quick checklist and a full Gantt-scheduled build won't be a different system.

3. The Project List

The Project List shows every project you have access to, with its mode, client, phase, percent complete, and (for Standard projects) its RAG (Red / Amber / Green) health indicator. You can filter by Service Board, client, project type, health status, or assigned project manager to find what you're looking for.

4. Working a Checklist Project

A Checklist project keeps things simple providing a single ordered list of tasks that the team works through — no phases, no Gantt overhead. Each item is still a full ticket underneath (inheriting time

tracking, SLA, and billing), but the interface is built entirely around completing items quickly, one after another.

- Each item shows a checkbox, the assignee's avatar, a due date, and a status badge.
- A single click marks an item complete and transitions its underlying ticket to Completed — no need to open the full ticket unless you need to do detail work, which you can always do from the side panel.
- A progress bar ("X of N tasks complete") sits at the top of the project and on its card in the Project List.
- If an item can't start until a predecessor finishes, it shows a padlock icon with a tooltip naming exactly what's blocking it.
- Overdue checklist items surface on the assigned technician's dashboard and Service Board views and trigger the same SLA notifications a standard ticket would.

Checklist Templates

A Checklist Template defines a reusable, ordered set of items — with default assignee roles, SLA targets, and optional "complete this before that unlocks" sequencing — for a workflow you run repeatedly (New Client Onboarding, Windows Rollout, SOC 2 Readiness). When you create a project from a template, every ticket is generated immediately in Draft status, then activated all at once or one-by-one as each predecessor closes, depending on how the template is configured.

5. Working a Standard Project

A Standard project organizes work into Phases (each with its own dates, budget, and completion percentage), with Tasks underneath mapping one-to-one to Help Desk tickets. A Milestone is simply a zero-duration phase used as a gate — a clean way to mark "Design Sign-Off" or "Go-Live" without it being a real block of work.

Views: List, Kanban, Gantt, Calendar, Workload

You can switch between views from the project's view switcher — your last-used view is remembered per project, per user.

View	What It Shows
Gantt / Timeline	The primary scheduling view. Task bars are colored by phase with a completion fill; milestones render as diamonds. Drag a bar to reschedule — dependent tasks shift automatically, with a confirmation dialog showing exactly what will move and by how much. Zoom from Day up to Year, with an auto-fit button. Click a task name to rename it in place; click a date to use the picker without leaving the Gantt.
Kanban Board	Columns represent phases or statuses — a familiar drag-and-drop board view of the same underlying tasks.

View	What It Shows
Calendar	Task due dates shown on a month or week grid.
Workload	A resource-utilization heat map: each person's assigned hours per day or week, across every project they're on. Over-allocated resources (assigned more than their configured weekly capacity) are flagged in red.

Tip. Everything you see in the Gantt and the Workload view is computed from the exact same scheduling engine — there's no separate calculation path that could ever disagree with what the grid shows you.

Dependencies & Auto-Shift

All four standard project-management dependency types are supported between tasks:

Type	Meaning
Finish-to-Start (FS)	Task B can't start until Task A finishes. -- The most common type
Start-to-Start (SS)	Task B can't start until Task A starts.
Finish-to-Finish (FF)	Task B can't finish until Task A finishes.
Start-to-Finish (SF)	Task B can't finish until Task A starts. -- Rare, but available.

Add lag time (a delay after the dependency is satisfied) or lead time (entered as a negative lag, allowing overlap) on any dependency. When a task's dates change — whether you edit them directly or drag the Gantt bar — every downstream dependent task shifts automatically by the same delta, respecting your organization's configured working calendar (so a 3-day task starting Friday correctly ends Wednesday, not Monday).

Resources, Budget & Financials

Assign one or more people (or teams) to a task, each with a planned-hours figure and a role (Lead Engineer, Project Manager, QA (Quality Assurance), etc.). Those planned hours form the project's budget baseline; actual hours come straight from time entries logged on the underlying tickets.

- The Project Financials tab shows planned vs. actual hours and cost side by side, using each person's normal billing rate.
- The Portfolio Dashboard flags any project that has an unassigned task, so nothing falls through the cracks.

Baselines & Schedule Variance

Save a Baseline at any point to snapshot every task's planned dates, durations, and resource assignments. Once saved, the Gantt shows a second stripe beneath each task bar for a clean visual comparison between what you originally planned and where things currently stand. You can save multiple baselines over a project's life and compare across any of them.

6. Every Task Is a Ticket

There's no separate task database hiding behind the project view — a project task and a Help Desk ticket are the same record. This has a few practical effects worth knowing:

- The ticket's Summary is what displays as the task name in the project and on the Gantt. Rename the task from the project view and the ticket's Summary updates to match, and vice versa.
- When a ticket moves to Completed or Closed, its project task is automatically marked complete and the phase/project completion percentages recalculate — no manual bookkeeping.
- Any ticket linked to a project gains a Project tab, showing the project name, phase, WBS (Work Breakdown Structure) number, planned start/end, dependencies, resource assignments, estimated hours, and budget status.

Tip. *The Project tab isn't limited to formal projects — it can be enabled on any single ticket that just needs scheduling fields (a planned start/end date, an estimate) without the overhead of setting up a whole project around it.*

Any open ticket can be promoted into a project task directly from the ticket's action menu — this creates its project record, assigns it a phase and position, and adds the Project tab, all in one step.

7. Project Templates

A Project Template captures a reusable phase/task structure (with default resources, durations, and dependencies) so you're never rebuilding the same project shape from scratch. Create a template from an existing project, apply it to start a new one, and version it over time as your standard delivery process evolves.

8. The Portfolio Dashboard

The Portfolio Dashboard is the top-level view for anyone overseeing more than one project at a time, such as a project manager, a delivery lead, or an executive.

- **Project health cards** -- each active project shown as a card, with its client, phase, percent complete, budget variance, days to deadline, and a RAG status.

- **RAG auto-calculation** -- Green means on schedule and on budget. Amber means within 10% over on either schedule or budget. Red means more than 10% over, or already past deadline. Anyone can manually override the color but they have to log a reason for doing so.
- **Filters** -- narrow the dashboard by Service Board, client, project type, health status, date range, or assigned project manager.
- **Timeline roll-up** -- a master Gantt showing every active project on one timeline, with phases as summary bars and individual tasks hidden until you expand a project.

Click any project card to jump straight into that project's detail view, opening in whichever view you last used.

9. Permissions: Who Can Do What

Project permissions inherit downward from the Service Board a project belongs to — a project under an "IT Team Only" board starts with that same restriction — and can be overridden at the individual project level or for a specific person.

Capability	Admin	PM	Contributor	Viewer	Client
Create / delete project	Yes				
Edit project settings & mode	Yes	Yes			
Add / remove phases & milestones	Yes	Yes			
Create / close tasks (tickets)	Yes	Yes	Yes		
Log time on tasks	Yes	Yes	Yes		
View financial data (budget / cost)	Yes	Yes			
View Gantt and schedule	Yes	Yes	Yes	Yes	Yes
View checklist (portal)	Yes	Yes	Yes	Yes	Yes
Save baselines	Yes	Yes			
Manage resource assignments	Yes	Yes			

10. Client Portal Visibility

Clients see project information through the Customer Portal without ever touching the internal Help Desk interface:

- A project list showing every project where their company is the client — name, type, RAG status, percent complete, and next milestone.
- For Checklist projects, a client-friendly checklist view with item names, status, and due dates — anything marked "internal only" on a ticket comment, stays hidden.
- A read-only Gantt showing phases and milestones -- individual task detail stays hidden unless the project manager specifically opts to expose it.
- Published status reports — the project manager controls whether a report is a draft or visible to the client.
- Automatic milestone notifications by email (and portal notification, if enabled) the moment a milestone completes.
- A way for the client to request a new task or flag a concern directly from the portal — this creates a draft ticket attached to the project, pending your review before it's formally added.

11. Reports & Dashboards

Report	Key Metrics
Project Health Summary	RAG status, percent complete, budget variance, days to deadline.
Resource Utilization	Hours assigned vs. capacity, by resource and by week.
Budget vs. Actual	Planned hours/cost vs. actual hours/cost, with variance.
Milestone Tracker	Every milestone, planned vs. actual date, variance, and status.
Checklist Completion	Items complete vs. total, overdue items, and completion rate by template.
Portfolio Overview	Every project's health, budget, and timeline shown at a glance.

12. Common Workflows

Kicking off a new client onboarding

- Create a project from your onboarding Checklist Template.
- Confirm the auto-generated tickets and assignees look right.
- Track progress from the checklist progress bar as items complete.

Standing up a Standard project from scratch

- Create the project, add phases, and add tasks (tickets) under each phase.
- Set dependencies between tasks and assign resources with planned hours.
- Save a baseline once the plan is approved, so you have something to measure against later.

Checking in on a project's health before a client call

- Open the Portfolio Dashboard and find the project's health card.
- If it's Amber or Red, open the project and check the Financials tab and Gantt for what's driving it.
- Review the baseline variance stripe to see exactly where the schedule has slipped.

13. Quick Reference & Glossary

Term	Meaning
Phase	A named grouping of tasks with its own dates, budget, and completion percentage.
Milestone	A zero-duration phase used as a gate or checkpoint.
WBS	Work Breakdown Structure — the numbered position of a task within the project hierarchy.
Baseline	A saved snapshot of the planned schedule, used to measure variance later.
RAG Status	Red / Amber / Green — a project's at-a-glance health indicator.
Dependency	A rule linking two tasks (Finish-to-Start, Start-to-Start, Finish-to-Finish, or Start-to-Finish), optionally with lag or lead time.
Portfolio Dashboard	The cross-project view for anyone managing more than one project at a time.
Project Template	A reusable, versioned phase/task structure you can apply to new projects.