questico.site

Tasks & Projects

User manual

Inside your tool it is called “Karya”.

A task and project tracker for small teams, with a board for every project, workload balancing, optional timesheets and a one-page client status report.

1. Your tool at a glance

Karya puts every project on one board: who is doing what, what is due this week, what is late, and how many hours went into it. Staff see their own day first, while the owner sees every project and every person's load, and can send the client a printed status report or a WhatsApp update. With time tracking on, the owner also sees billable hours and their rupee value.

Made for: Small studios, agencies and offices of about 3 to 50 people working on client projects. The sample business is a design studio in Kochi.

Who can do what

Your tool has 3 role profiles. Everyone signs in with their own email address and sees only what their role allows.

Role	Usually	Can	Cannot
Owner	The studio or agency owner	• Do everything a manager can • Delete a project (its tasks go with it; logged hours stay) • Give a person access from Karya's Team screen: saving them sends the invitation to their email address • Remove a person's access by unticking Active	• —
Manager	A project manager or team lead	• Edit and move every task • Create and edit projects, including from templates • Open any person's My tasks • See the team's hours and download timesheets • Open Reports and set billing rates • Add and edit people on the Team screen	• Delete a project • Give new people access; only the owner's save sends the invitation
Member	Team members who do the project work	• Add tasks, if the owner allows members to • Change and move cards assigned to them, unassigned, or created by them (all cards if the owner allows) • Comment on any card • Delete tasks they created • Log their own time • See the Team screen without hours	• Create or edit projects • Open Reports or see billing rates • See other people's hours • Edit people on the Team screen • See hours on the client status report

What staff can do in each list

These rules are kept by Questico's database, not only by the screens: a staff member who finds a way past a screen is still refused. They are for staff: owners and managers are not held to them.

Team

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.

Projects

- Staff see every entry.
- Staff can't add entries.
- Staff can't change entries.
- Staff can't delete entries.

Tasks

- Staff see every entry.
- Staff can add entries in their own name.
- Staff can change only their own entries.
- Staff can delete only their own entries.
- An entry is a staff member's own when they made it or it is assigned to them.
- An entry with no assignee yet can be picked up by any staff member.
- Once saved, staff can never change the person who made it.
- Staff may add to the comments and the history, never rewrite or remove what is there.
- Turning on “Members can change any card, not only their own and unassigned ones” in the admin panel gives staff more room here.

2. Getting started

Ready when you buy

- Your business name (and its short form) is set from checkout, and your contact details replace the demo's.
- The demo business is gone: its people, customers, vendors and figures are not in your copy. City and address start empty for you to fill in.
- Lists such as departments start with a common set; change them to match your business in the admin panel.

Where your tool lives

- Your tool has its own address, such as yourbusiness.questico.site. Open it on a phone or a computer.
- You can also open it from your Questico account: Your space → Paid, or your console, where the tool shows three buttons: Open the tool, Edit website (the admin panel) and Team.

Signing in: there are no passwords

- Everyone opens your tool’s address and presses Sign in, then signs in with the email you added for them, in one of two ways.
- With Google: press “Continue with Google”. For a Gmail address, or a work email that is a Google account (Google Workspace). Google looks after the password and security.
- With any other email (Outlook, Zoho, your company’s own mail): under “No Google account? Use any email”, type the address and press “Email me a code”. Questico emails a 6-digit code; type it in and you are in. The code works once and expires soon.
- Someone who signs in but has not been added sees “You’re signed in, but not invited yet” until you add their address.

Adding your team

1. One person at a time: inside the tool, open Team and add their name and email address, and choose Member or Manager. Saving gives them access and puts them on the tool’s own list.
2. Everyone at once: in your Questico console, open the tool’s Team section → Add many from Excel. Download the template, fill one row per person (name, email, access, and if you like mobile, department, designation and joining date), and upload it. You see every row checked before anything is added. Uploaded people get access and appear on the tool’s own list too.

3. Your whole company, for all your tools: Your space → Your company team. Upload your staff sheet once (name, email, employee ID, department, designation, function, mobile, joining date, access, and Active or Left), then press Apply beside each business tool. New people get access and appear on the tool's own lists. Applying never changes the access someone already has in a tool. To take someone off, mark them Left: the next Apply removes their access, and their past records stay. Someone simply missing from a new sheet is not treated as having left.

Partners as owners

- If you run the business with partners, make them owners too: in your console, the tool's overview has an Owners card. Type a partner's email and press Add an owner. Up to five owners in all.
- They become owners the next time they sign in to Questico with that email, and can then do everything you can: the admin panel, the team, and asking for changes. The tool shows in their own Your space under Sites you co-own.
- Any owner can remove a co-owner, and a co-owner can leave. The person who bought the tool always stays an owner.

Sending the invitation, and seeing who has joined

- Questico emails each person an invitation as soon as you add them, however you add them: one at a time, from Excel, or from your company team. It tells them your tool's address and how to sign in, with Google or with a code.
- In the console's Team section, "Remind the N not signed in" emails everyone who has not joined yet. Under "Send the invitation" you can also copy the ready message for your team's WhatsApp group.
- The same page counts who has joined and who has not signed in yet, lists everyone with the date they were invited and the date they joined, and downloads the list for Excel.
- To change someone's access or remove them, use the tool's Team screen or the console's Team section. Their past records stay.

The emails Questico sends your team

Questico tells people when something needs them, by email from notices@questico.site, so nobody has to keep the tool open to find out.

Within a few minutes

- The person it is assigned to: "A task is assigned to you: [title] (due [due])."

Every morning at 8

- The person it is assigned to: "N tasks due today or overdue"

Several things at once come as one email, never a flood. Each email says what happened and links to your tool. Anyone can stop them: the link at the foot of each email stops that business's notices for that person, and the same link turns them back on. Invitations and sign-in codes still arrive.

Changing your settings

In your console, press Edit website to open your tool's admin panel. Change the name, logo, colours, words, pictures, lists and rules; every change shows in a live preview first. Records (the day-to-day entries) are made inside the tool itself.

Everyday features

- On a phone the menu moves to a bar at the bottom, and tables turn into cards.

- Anything printable opens your browser’s print window, where you can also choose “Save as PDF”.
- Lists and reports download as CSV files that open in Excel.
- WhatsApp messages open ready-written; you press send. Nothing is sent automatically.

3. Your first day

1. Before buying, try the demo with sample data and switch View as between owner, manager and member to see each screen
2. Open the admin panel from Edit website in the Questico console; every change shows in a live preview
3. Enter the business name and logo, and pick the colours
4. Set the board columns (mark the done column and the 'waiting on client' column) and any card limits; set the priorities and the default
5. Decide what members may do, and set the labels and ready-made checklists
6. Set the kinds of work (including 'Internal') and the project templates
7. Set the capacity per person, team roles and week start; decide on time tracking, the daily target and the billable default
8. Write the report heading, look-back and look-ahead days, hours setting, closing note and sign-off title
9. Fill in the welcome texts, sign-in texts, pictures and contact
10. Add your team: in the Questico console's Team section, type each person's email address and choose 'Can use it' (member) or 'Can manage it' (manager); or add them on Karya's Team screen, where the owner's save sends the invitation
11. Ask each person to sign in with that email address (with Google, or a code Questico emails them)
12. Inside Karya, create your projects, optionally from templates
13. If you track time, set the billing rates in Reports

4. Everything it does

Home (owner and manager)

- Show a headline with tasks due today, running late and active projects
- Start a new task (or project) or open the board in one tap
- Show figures for Open tasks (with tasks added trend), Due this week, Running late (with the oldest) and Done this week (with trend)
- List what needs attention: late, due today, and waiting on the client
- Chart tasks finished and added, week by week over 8 weeks
- Show projects with progress bars
- Show each person's open tasks against their capacity, in red when over

Home (member)

- Show figures for My open tasks, Due today, Running late and Hours this week (or Done this week)
- List what is up next: late first, then by due date
- List the member's projects and a team activity feed
- Start a new task (if allowed), open My tasks, or log time

My tasks (everyone)

- Group open tasks into Running late, Today, Later this week, Coming up and No due date

- Show a badge counting my tasks due or late
- Show tasks finished in the last 30 days
- Tick a task done or undone
- Let managers view any person's tasks

Board (everyone)

- Show one column per status, with a card count shown red when the column's limit is passed
- Move cards by drag and drop on desktop (with ordering) or with left and right arrows; use a lane picker on phones
- Filter by project, assigned to (Everyone, Only mine, Not assigned, a person), priority and label, and search
- Keep finished cards on the board for the set number of days
- Add a task straight into any column with its '+' button
- Show on each card its key (such as CODE-12), a flag for the top two priorities, project, labels, due date, checklist count, comment count and the assignee's picture

Task detail (everyone; editing within their rights)

- Edit the title, column, assignee, due date, priority, notes and labels
- Add, remove and tick checklist items, or add a ready-made checklist
- Post comments (anyone can comment) and see the last 6 activity entries
- Log time against the task, save or delete it
- Show the task read-only to people who cannot edit it; they can still comment

New task (everyone, if allowed)

- Enter what needs doing, project, assigned to (members default to themselves), due date, priority, column, a ready-made checklist, notes and labels

Projects (everyone views; owner and manager edit)

- Switch between Active, On hold, Completed and All
- Show project cards with client, status, kind of work, end date, progress, lead, and late or open count
- Open a project to see progress %, open tasks (and waiting on the client), running late, and hours against budget (managers; members see their own hours here)
- List the project's tasks by Open, Done or All, with an About card, a 'Where the tasks are' chart and the next deadlines
- Print a client status report or send a WhatsApp update from the project
- Create or edit a project: name, client, short code (2–5 characters, suggested from the client name), kind of work, status, project lead, hours budget, start and end date, colour (10 swatches) and description
- Start a new project with tasks from a template; due dates are spread up to the end date
- Delete a project and its tasks (owner only); logged hours stay

Calendar (everyone)

- Show a month grid of tasks by due date, plus project end dates, with late days highlighted
- Filter whose tasks to show
- Click a day to see its tasks or add a task due that day
- List late and coming-up tasks, a summary of this month, and a count of open tasks with no due date

Time (everyone, when time tracking is on)

- Show My week with week arrows: hours, billable %, days logged, and average a day against the target
- Show each day's entries marked Billable or Internal, in amber when below half the daily target
- Log or edit time: date (today or earlier), hours (0.25 to 16, in quarter hours), project, task or 'General work', note, and billable (off by default for Internal projects)
- Edit and delete entries
- Show managers the team's month: hours, billable hours and days by person; billable and internal hours by project; and a timesheet download

Team (everyone views; owner and manager edit)

- Show who has what: open tasks per person, by column
- Show who is over capacity, who has room, and unassigned tasks with a link to assign them on the board
- List each person's open, late, due this week, done in 30 days, hours this week (managers only) and access
- Open a person to see their open tasks; managers can edit them or open their tasks
- Add or edit a person: full name, email address, role in the team, access (Member or Manager) and Active

Reports (owner and manager)

- Move between months
- Show tasks finished, on-time %, average days to finish, and billable value (or open tasks when time tracking is off)
- Chart tasks finished and added by week, and hours by project (or who finished what)
- Show a projects table: progress, late, done this month, hours and billable value, with totals
- Show a people-this-month table
- Download tasks as a spreadsheet
- Set billing rates: a standard ₹ per hour rate and per-project rates

5. Reports, prints and downloads

Prints

- Client status report, printed or saved as PDF: letterhead, report title and date, project, client, timeline and lead
- Progress %, tasks done, 'Waiting on you', and hours against budget (for managers, if the owner turns it on) or tasks running late
- Sections for finished in the last N days, in progress, coming up in the next N days, and waiting on you
- Closing note, a signature with the lead's name and title, and the footer 'Prepared with Karya'

Downloads

- Timesheet for a month (owner and manager)
- Tasks (from Reports)

WhatsApp

- Project update with progress, finished recently, coming up and waiting on you; WhatsApp opens with no number chosen, so the user picks the contact or group and presses send

Worked out for you

- Project progress % = done tasks ÷ total tasks
- Overdue and due-soon flags, using the owner's due-soon days
- Each person's open tasks against their comfortable capacity
- On-time % = tasks finished by their due date; days to finish = from added to done
- Hours against the project budget %
- Billable value = billable hours × the project's rate (or the standard rate)
- Weeks start on Monday or Sunday, as set by the owner

6. What you can change in the admin panel

No coding: every change shows in a live preview, and saving updates your live tool.

Business & look

- Change the name (also printed on the report), short name and city
- Upload the logo
- Choose the main colour, sidebar style (Light, Deep or Tinted), one of 8 typefaces, and corners (Soft, Round or Sharp)

Board & workflow

- Set 2 to 8 board columns, each with a name, short code, colour, whether it counts as done, whether it means waiting on the client, and a card limit (0 means none)
- Keep finished cards on the board for 0 to 90 days
- Set 2 to 6 priorities, each with a name, code and colour, and the priority for new tasks

Tasks & checklists

- Allow members to add tasks
- Allow members to change any card
- Highlight tasks due within 1 to 14 days
- Edit the labels
- Set up to 12 ready-made checklists, each with a name and steps (one per line)

Projects

- Edit the kinds of work; 'Internal' logs hours as non-billable
- Set up to 12 project templates, each with a name, kind of work and tasks (one per line)

Team & hours

- Set the comfortable number of open tasks per person
- Edit the roles in the team
- Choose whether weeks start on Monday or Sunday
- Turn time tracking on or off
- Set the target hours per working day
- Choose whether new time entries are billable by default

Client status report

- Write the report heading

- Set the look-back and look-ahead days (3 to 60)
- Show or hide hours and budget
- Write the closing note and the title under the lead's name

Words & pictures

- Write the manager welcome and member welcome
- Write the sign-in heading, text and quote
- Change the three pictures; they are shrunk automatically on upload

Contact

- Enter the contact email and WhatsApp (printed on reports)

Checks the panel makes

- One column must count as done and at least one must not
- Column and priority codes must be unique
- The default priority must exist
- Each template's kind of work must be in the kinds of work list

7. Good to know

- Files cannot be attached to tasks
- There are no recurring tasks, sub-tasks (only checklists), task dependencies or notifications
- Clients do not log in; they receive a printed or PDF report, or a WhatsApp text
- It does not make invoices; billable value is shown as a figure only
- Time can be logged only for today or earlier, and there is no running timer
- Tasks of projects completed more than 120 days ago are not loaded
- Deleting a project deletes its tasks, but the hours stay in timesheets
- WhatsApp opens with the message ready; nothing is sent automatically
- A person who signs in without being invited sees 'You're signed in, but not invited yet'

Need help?

Write to contact@questico.site with your tool’s address and what you need.