PROJECTABLE

Getting Started with ProjectAble

A first-10-minutes guide for new users

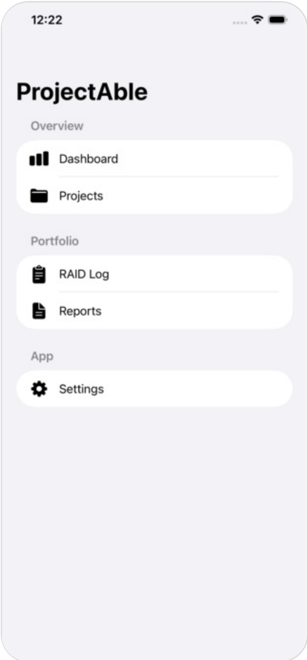
Aleynmoor PM • aleynmoor.co

1. Launching the app

When you first open ProjectAble, you'll land on an empty **Dashboard** — there's nothing to show yet because you haven't created a project. This is expected; the Dashboard fills in once you have live data.

The app's main menu (swipe in or tap the menu icon) is split into three groups:

- **Overview** — Dashboard, Projects
- **Portfolio** — RAID Log, Reports
- **App** — Settings

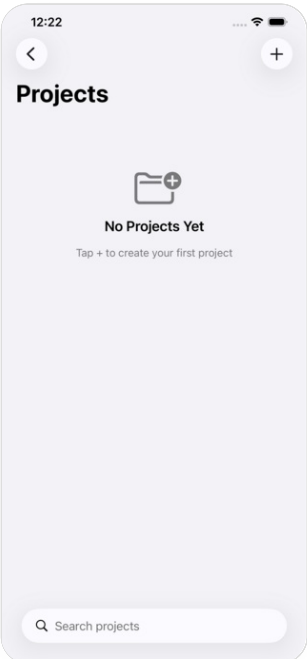


The main menu

You don't need to touch Settings to get started, but it's worth knowing it's there — it's where you set your currency and your **RAG thresholds** (the cost/schedule performance scores that decide what counts as green, amber, or red). The defaults are industry-standard (Green ≥ 0.95, Amber ≥ 0.85), so most people leave these alone initially.

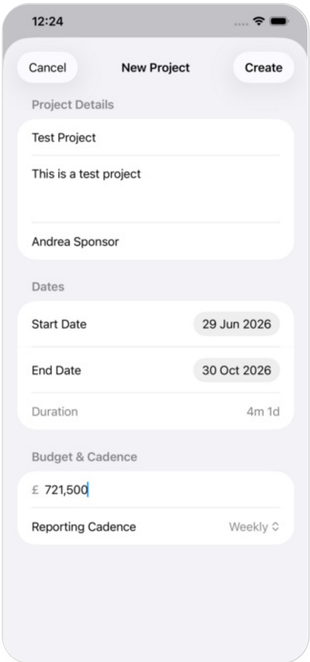
2. Creating your first project

Go to **Projects** and tap the **+** button in the top right.



Projects — before you've created anything

This opens the **New Project** form, with three sections:



The New Project form, filled in

Project Details

- Project Name
- Description
- Sponsor

Dates

- Start Date / End Date (date pickers) — the form calculates and displays your project duration automatically as you set these

Budget & Cadence

- Total Budget
- Reporting Cadence (weekly, fortnightly, monthly — your pick list of how often you'll report progress)

Once you've entered a budget, a **Budget Preview** section appears showing your total number of reporting periods and the budget allocated per period, calculated automatically from your dates and cadence. This is a good sanity check before you hit Create — if the per-period number looks off, your dates or cadence are probably what need adjusting.

Tap **Create**.

> **Worth knowing:** ProjectAble generates all your reporting periods automatically the moment you create the project, based on the start/end dates and the cadence you chose. You don't create periods manually later — they're already waiting for you in the Cadence tab.

3. The Project Home screen

Tap your new project in the Projects list to open it. You'll see four tabs:

Tab	What it's for
Overview	Key project info, performance metrics, and summaries
Sub Projects	Breaking the project into workstreams, each with its own budget slice
Cadence	Entering your actuals each reporting period
RAIDs	Risks, Assumptions, Issues, Dependencies, Actions

On a brand new project, **Overview** shows your project info (name, sponsor, duration, budget, cadence) along with three placeholders: "No Actuals Entered Yet", an empty Sub Project summary, and an empty RAID summary. That's normal — these fill in as you use the other tabs.

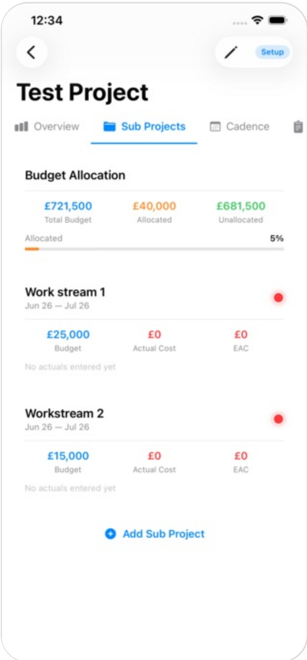
Note: ProjectAble doesn't have a separate stakeholder feature — if you're tracking stakeholder relationships, that's a different one of our apps, Stakeholder Sync.

4. The two things that aren't obvious at first

These are the details that catch new users out, so worth reading before you dive in:

Sub Project budgets come out of the main project budget

When you add a Sub Project (from the Sub Projects tab), the budget you allocate to it is taken from your overall project budget, not added on top. The Budget Allocation card shows you Total / Allocated / Unallocated as you go, and will flag clearly if you've over-allocated. Plan your total project budget with this in mind — it needs to cover everything you intend to break out into sub projects, plus anything that sits at the main project level.



Sub Projects — budget allocation across two workstreams

Updating cadence often means updating in two places

If your main project carries its own budget allocation alongside its sub projects, you need to enter actuals for both the main project's periods *and* each sub project's periods in the Cadence tab. They're tracked separately. Skipping one will leave that part of your Overview showing "No Actuals" even though you've reported elsewhere.

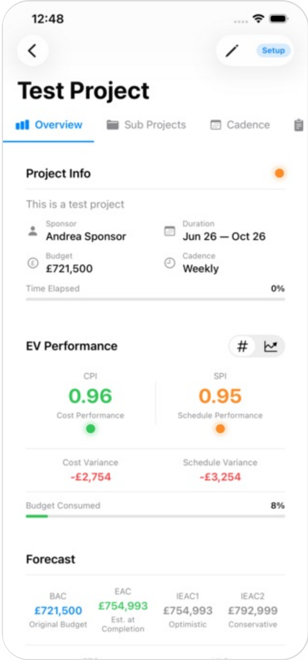
5. Entering actuals and seeing the numbers come alive

Go to the **Cadence** tab and tap any unlocked period (future periods are visible but locked until their time comes). For each period you can enter:

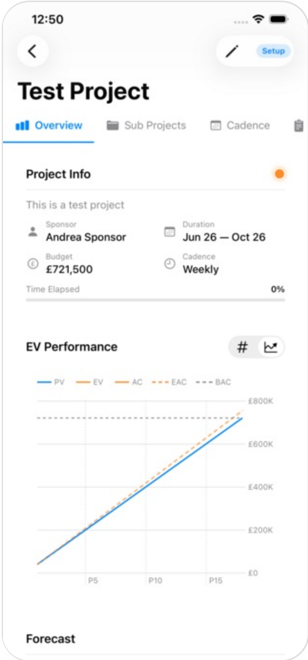
- **Planned Value** — pre-filled from your budget split, but you can adjust it if the budget's been reallocated for that period
- **Actual Cost** — what's actually been spent
- **% Complete** — your assessment of progress against plan

As soon as you've entered these, ProjectAble calculates your **CPI** (Cost Performance Index) and **SPI** (Schedule Performance Index) live, and colours them according to your RAG thresholds.

Head back to **Overview**, and the "No Actuals Entered Yet" placeholder is replaced by a proper performance card. This is where the **numeric/chart toggle** lives — a small segmented control in the top right of the performance card lets you flip between the raw CPI/SPI numbers and an S-curve chart of the same data. Same data, two views — use whichever suits how you think.



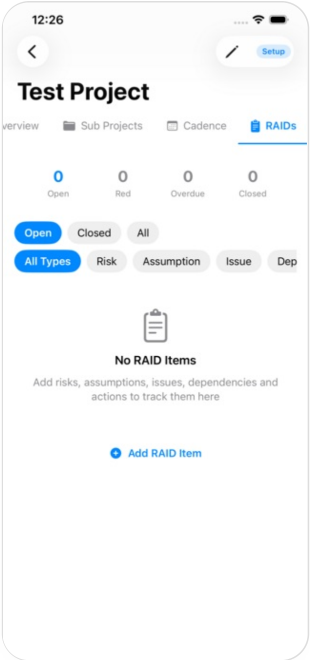
EV Performance — numeric view



EV Performance — chart view (same toggle)

6. RAIDs

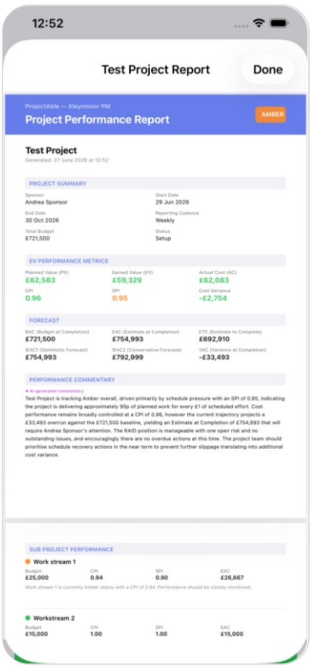
The **RAID Log** (Risks, Assumptions, Issues, Dependencies, Actions) is available both at the portfolio level (across all your projects, from the main menu) and within each individual project. Add items via the **+** button, filter by type or open/closed status, and overdue items are flagged automatically.



RAIDs tab — project level

7. Sharing progress with a Report

When you want to share progress with a sponsor or stakeholder, head to **Reports** from the main menu, select your project, and ProjectAble generates a full **Project Performance Report** — RAG status, EV metrics, forecast figures, sub project breakdowns, and an **AI-generated commentary** that reads the numbers and writes a plain-English summary of where things stand and what needs attention.



Project Performance Report, with AI commentary

It's ready to export as a PDF — a polished, ready-to-send update without you having to write the narrative yourself each time.

You're up and running

At this point you have a project with a budget, a cadence, live performance tracking, and a place to log risks and issues. From here it's really just a case of updating your Cadence entries each reporting period and letting the Overview tab tell the story.

If anything above doesn't match what you're seeing, or you hit something that feels like a bug rather than "a bit unintuitive," let us know — that feedback is exactly what testing is for.