Fube

GUIDE

How to track a project's progress, hours and budget in Fube



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> When you're juggling three or four projects at once, the awkward question is always the same: is this project on track or is it getting away from me? You know roughly which tasks are left from memory, you suspect you've gone over on hours on one and not on another, but the actual figures are scattered between your head, a couple of notes and that end-of-month feeling. This guide shows you how to replace that hunch with a **dashboard that calculates itself**: progress, overdue tasks, hours logged week by week against what was planned and, if you set it up, how much of the budget you've used and how quickly.

Before you start, a couple of things are worth knowing. First, **tracking is based on tasks**: a project with no tasks has little to measure, so this guide assumes you've already created the project and added tasks to its board. If you haven't yet, start with **organising your invoices and expenses by project**, which is where the project is created. Second, **Projects isn't included in the Starter or Pro plans, but it is in Business and Elite** — Business with five projects and Elite with no limit: if you can't see the section, check your permissions first and then your plan (you'll find it on the **pricing** page).

Step 1. Open the project overview

Each project has its own tabs, among them **Overview**, **Tasks**, **Time**, **Reports**, **Members** and **Settings**. When you click a project in the list, you go to its **Overview**, which is the statistics dashboard: it's recalculated on every visit from the tasks and the time logged. There's no need to click ‘calculate’ or reconcile anything: the dashboard reads the project's current state and summarises it.

Right at the top there's a **period selector**. By default it's **This quarter**; you can choose another — **Last 7 days**, **Last 30 days**, **Last 90 days**, **Last 12 months**, **This month** or **This year** — or a **Custom range** on the calendar, and the one you choose is remembered in your browser. It's worth understanding what changes with it and what doesn't: the project's **status** (completed tasks, hours against the estimate, budget and overdue tasks) is today's, whatever period you're looking at; what follows the period is the **activity**: how much time was logged, which tasks were completed, what the time was spent on and what was invoiced. Hours, completed tasks and the amount invoiced are compared with the period before — the same number of days just before, or the same stretch of last month, quarter or year —, so if hours are up 40%, 40% more work was done in this period than in the previous one.

From top to bottom, the overview has: a strip with five figures for the period — **Hours**, **Completed tasks**, **Invoiced**, **Margin** and **Unbilled** —, which tell you what they measure when you hover over them (hovering over **Hours** opens its chart); the project name with 'Here's what's pending.' and whatever needs something — **Overdue tasks**, **Due this week**, **Under review** and **Unbilled hours** —, or 'All up to date: nothing overdue or awaiting review.'; the **Hours over time** chart next to **How it's going**; **Hours by person**, **Hours by task** and **Cumulative spend**; and three task lists: **Overdue**, **Due this week** and **Completed**.

Task views, and why the columns are what they are

Before reading the figures, it's worth knowing where they come from, because a project's tasks can be viewed in two ways.

It's a single list. In the project's **Tasks** tab, the switch on the right of the bar toggles between the **table** — with filters, sorting by column and multiple selection, handy for planning —, the **grid** — the same tasks as cards — and the **board** — that same list split into columns, handy for moving work around by dragging cards. The switch appears on desktop screens. Filters and search are the same in all of them: if you filter by assignee in the table and switch to the board, it stays filtered.

Each card on the board shows the task number and its priority at the top, the title below and, only if it has them, the labels, estimated hours, due date and assignee. Anything shortened can be read in full by hovering over it: the priority name, the labels that don't fit behind the '+1', the full due date. Right-click — or use the ⋯ that appears when you hover over it — to get the task menu without opening it: change its status, priority or labels, **assign it**, add **watchers**, start the timer or delete it. An empty column shows you where to drop the card; one you don't want to see — 'Cancelled', for example — can be **collapsed** from its header and stays as a narrow strip, which still accepts cards and which your browser remembers. And if the project has more statuses than fit across the screen, the edge fades out and its arrow lets you see the other columns. With large projects, each column shows how many tasks it has in total and loads them as you scroll down, so the board opens just as quickly with fifty tasks as with five thousand.

The board can also be used **without a mouse**: press Tab to reach a card's handle, Enter (or the space bar) picks it up, the arrow keys move it between columns and positions, Enter drops it and Escape cancels. Each step is read aloud for anyone using a screen reader.

And you don't need to leave the list to open a task. When you click a row in the table or a card on the board, the task opens in a **side panel** on top of what you were looking at. At the top is its title, which you can edit right there, and the **Start timer** and **Assign to me** buttons. Below are its details — status, priority, assignee, due date, labels, estimated hours and watchers —, which you can change from there and which are saved as you select them; then the description and attachments — with **Attach**, or by dragging the files onto it, they're uploaded and stay on the task straight away —, and finally the **Comments**, **Time** and **History** tabs. When you close it you're still in the same place, with the filter and view unchanged. **Open full screen** takes that same task to its own page.

And something hardly anyone finds on their own: **the board's columns aren't fixed, nor does Fube decide them**. They come from the **Allowed task statuses** field, in the project's **Settings** tab. A new project starts with three — **To do**, **In progress** and **Completed**; if your work goes through a review stage, or you want a column for what gets discarded, add **In review** or **Cancelled** and its column appears. And the other way round: any status you remove is no longer a column. It's the only place from which the board can be changed.

A reassuring caveat: if you remove a status that some tasks already had, **its column keeps appearing** as long as there are tasks in it. No task becomes invisible because of a configuration change.

Step 2. Read the progress and overdue tasks

Progress is the **Completed tasks** row in **How it’s going**: the percentage of tasks marked as completed out of the total, and the total also includes cancelled ones. If a project has ten tasks and four are finished, it shows 40% and ‘4 of 10 tasks’ underneath. The **Completed tasks** in the strip at the top are something else: how many were closed in the period, with a small line that plots them and their change compared with the previous period. And next to the project name, **Under review** tells you how many are awaiting review: that way you don't just see how much is left, but **where the work is stuck**.

Overdue tasks are those that have passed their deadline and are not yet completed or cancelled. It's the indicator to check first every morning: one overdue task isn't a disaster, but three or four piling up are usually a sign that the project needs a conversation with the customer or a different split of work across the team. For this number to mean anything, tasks need to have a **deadline**; those without one don't count as overdue even if they've been stalled for weeks.

At the very bottom, three lists go into detail, one task per row with its date, who it is assigned to and its priority: **Overdue**, open tasks that are already past their date (oldest first); **Due this week**, the ones due in the next seven days; and **Completed**, the ones closed in the chosen period. Each row takes you to the task's page. If a list is empty, it says so; if there are more than will fit, **View all** and the number take you to the **Tasks** tab.

Step 3. Compare the time logged with the estimated hours

This is the heart of time profitability tracking. Fube works with two different figures and it is important not to confuse them:

- **Estimated hours.** This is the sum of the hours you entered for each task when planning it, in the task's *Estimated hours* field. It is your forecast, and it is the only hours field you edit from the task form.

- **Time logged.** This is the sum of the hours logged to the project, whether against a task or not: every time entry that someone times or adds manually, with its start and end. In the overview it also counts how long the running timer has been going, so you can see the day's work as it happens (except for a forgotten timer, explained below). It is the only ‘real’ hours figure the dashboard uses, and the same one that feeds the budget consumed in the next step. That time does not generate any invoice by itself: you invoice it yourself, whenever you like, with **Invoice** (below).

To log hours, each task has **Start timer** in its panel (and, while it is running, **Stop timer**); from the top bar, the **My time** panel includes the **Task timer** so you can find any task and start it. Each person runs only one timer at a time: starting another stops whichever one was running. Each time entry is marked as billable — **Charged to the customer**, on by default — and has its own hourly rate: the one you set when logging it manually or, if you don't set one, the project's rate at that moment. If you later change the project's rate, the hours already logged keep theirs.

The **Hours** figure in the strip is the time logged in the period (‘43h 16min’). In **How it’s going**, the **Hours** row is the project total against the estimate (‘57h 16min’, and underneath ‘of 66h estimated across the tasks’), and it turns red if you go over. The **Hours over time** chart breaks it down by day if the period is two weeks or less, by week up to about four months and by month if it is longer, with the period's figure, its change and, dashed, the curve of the previous period. **Cumulative spend** plots the hours added up against the estimate, so you can see how fast you are approaching the limit. And **Hours by person** and **Hours by task** show where the period's time went: who logged how much and what share of the total it is, with anyone who logged nothing at zero, because ‘hasn't logged any time’ is also information, and the tasks that took up the most hours, from most to least. It is the most direct way to learn from each project: if project after project you exceed your estimates by 20%, the problem isn't the customer, it's that you estimate too low, and that is corrected in the next quote.

If you want the detail rather than the overview, the project has a **Time** tab: the list of all time entries, one per row, with the task, who did it, which day, how long it took, whether it is charged to the customer and which invoice it went on. At the top are four figures for the set you are viewing — time logged, how much of it is billable, how much is still **unbilled** (billable, already closed time that is not yet on any invoice) and how many timers are **running** right now — and if someone is timing something at this moment their timer appears at the top, with their name. You can filter the list by task, by member and by day, and with **Log time** manually enter hours that were worked without using the timer, with a task or without one: a call to the customer or a trip to the printer's is project time and not time for any particular task. In this tab, anything running does not count towards the figures until it is stopped; in the overview, on the other hand, the time it has been running does count.

To review your own time without going project by project there is **My hours**, the tab next to the list in Projects; you can also get there from the **My time** panel in the top bar, with **My hours this week**. It is your week, Monday to Sunday, with the time logged, how much is billable, across how many projects and how it compares with the previous week. You move with the arrows or, by clicking the date, choose any day in a calendar with the month and year in drop-downs: to go to the same week last year you don't need to click the arrow fifty times. It only shows your own time: your colleagues' time is in each project's Time tab. Anything you have open is shown separately, at the top: the running timer and, if you left one on, the alert that it was left open.

The week can be viewed in three ways, which you choose at the top right and which are remembered in your browser: **Week** and **Day**, as a calendar, and **Table**, with your projects by day and below them your time entries one by one, which you correct by tapping them.

In the **calendar**, days are in columns and hours in rows, and each time entry is a block in its project's colour: at the top the project and how long it took (1:30 is an hour and a half), and below it the task with its number and what was done. The header, with each day's total and the week's — the same as in the table — stays fixed at the top as you scroll down the page. It shows 7:00 to 21:00: the early hours and the night are collapsed into a strip that expands when you click it, and if you have something logged at those times the schedule expands automatically, so nothing is hidden.

From there you log whatever is missing. When you hover over a gap, **Log time** appears with its time: if you **click**, the new entry opens with one hour from that moment, and if you **drag across the gaps** you mark the exact span, even if it runs from one day to the next (from 22:00 to 02:00, for example). You choose the project, the task and what was done, which is filled in automatically with the task name. **Dragging a block** moves it to another time or another day, even if it crosses midnight, and if you hold it for a moment at the left or right edge of the calendar you move to the previous or next week without letting go. **Dragging its top or bottom edge** changes its start or end time. Everything snaps to the quarter hour and is saved when you let go, and **Escape** cancels the drag. Clicking a block opens it for editing, and its ⋯ menu — or the **Delete** key with the block selected — deletes it, after you confirm. Anything already on an issued invoice has a padlock and cannot be moved or deleted, and anything still running cannot be moved.

The **Day** view shows a single day, with the seven days of the week in a row so you can switch from one to another, and its arrows go day by day. The figures at the top are then that day's, with the week's total beside them. On mobile the calendar is always shown this way, and you use it with your finger: tap a gap to log time and a block to change it.

If you forget to stop the timer, it stops counting after twelve hours. A timer that has been running for more than a full working day is not a long day, it is an oversight, and it does not count towards any project figure until you set its end time. On the first morning after it passes twelve hours, at 8:00, you get an alert in the bell, and clicking it asks you what time you stopped; if it was started by mistake, you can delete it right there.

To tell your customer how the month went, there is the project's **Reports** tab. You choose the month with the arrows, or by clicking the month to jump to any other, and you see four figures — the time logged compared with the previous month, how much is billable, the tasks completed and where the budget stood at the end of the month —, the tasks grouped into those completed that month, those still open and the rest that had hours logged, and a chart of the days with billable time stacked on top of non-billable time. It only adds up closed time, so its total is the same as that of the Time tab filtered to that month; if any time entry is still open, the report warns you at the top.

With **Download PDF** you get that same month in a document to send to your customer: with your company's name and logo, the project, its customer and the same figures as on screen. It is designed for external use, so it doesn't say who on the team logged each hour or how much it costs you; for the budget it shows the percentage used and the agreed total. A month that has already closed shows the tasks as they were at its end: a task you completed in October appears in the September report as open at the end of the month. And if your customer uses your portal, instead of sending it you can leave it there for them with **Publish to portal**, in that same row: this is explained further down in the section ‘Show your customer the project in their portal’.

And if what you want is the hours in a spreadsheet, there are three places, depending on what you need. **Download XLSX**, in Reports, exports that month's closed hours, and adds up to the same as the report. **Export XLSX**, in the Time tab, exports exactly what you have filtered. **Export hours**, in the Projects list, exports all projects for the chosen period, which is what you're after if you want the hours of each person on the team. All three contain one row per time entry (date, hours, project, task, what was done, person, whether it is billable and the rate) and two sheets already totalled: **by person** and **by person and project**. Each time entry's row also includes its start and end time, and the minutes. It is a spreadsheet to work with, not to send: what goes to the customer is the PDF. It only includes the projects you are a member of, or all of them if you are the company's owner or an administrator.

When the month is ready to bill, **Invoice**, in the same row in Reports, creates a draft invoice with that month's billable hours that you haven't yet charged for. You choose **One line per task** or **One line per day** and click **Create draft**; the customer is the project's customer, the series is your default invoice series, IVA and IRPF come from your invoice settings, as with a new invoice, and the payment methods from your company's. Each line is charged at the rate each time entry had, so hours at different rates appear on different lines. The invoice is tagged with the project, so it counts towards its profitability. The draft opens so you can review it and issue it. Those hours are marked as invoiced, so they won't be offered again the following month; if you delete the draft, they become pending again. While the invoice is a draft you can correct its hours; once it has been issued you can't, because what gets corrected then is the invoice. In the Time tab, the Invoice column shows which invoice each time entry went into, and the **Uninvoiced only** button leaves only what is still to be charged. To invoice you need three things: the project must have a customer selected, you must have a default invoice series and the hours must have a rate (their own or the project's).

If you don't want the whole month, you can also invoice individual time entries, from whichever month: in the Time tab you tick the ones you want, open **Actions** and choose **Invoice**. The same dialog and the same draft appear. Of what you tick, only what can be charged goes in: time entries that are still running, non-billable ones, those under a minute and those already on another invoice are left out, and the dialog tells you how many.

And to find out how much the project is earning you, the strip at the top of the **Overview** has three figures for the period you choose: **Invoiced**; **Margin**, which is the amount invoiced minus the project's expenses, with what was spent in its explanation; and **Unbilled**, which is the billable hours for the period that aren't yet on any invoice, at their rate (if they have no rate, it shows the hours). Everything is shown excluding taxes and only issued documents count: drafts and cancelled invoices don't add up, and a corrective invoice subtracts if it is negative. Only invoices and expenses that have this project selected in their 'Document tagging' block are included, so it's best to link them when you create them; those created by **Invoice** already have it set.

Step 4. Turn on budget used tracking (optional)

This is the most misunderstood block, so it's worth reading carefully. The **budget used** indicator can only be calculated if you have filled in **two project fields at the same time**:

1. The project's **budget** (an amount in euros that you enter when creating or editing the project).
2. The project's **hourly rate** (in euros per hour).

The indicator is the **Budget** row in **How it's going**. If either of the two is missing, it doesn't show 0%: it says what is missing ('No budget' or 'No hourly rate') and takes you, via **Set one in Settings**, to fill it in. With both set, Fube estimates the cost as **time logged × the project's hourly rate** and expresses it as a percentage of the budget, with the euros underneath. Watch out for two details: it counts **all** the time logged, billable or not, and it uses the rate the project has **today**, not the one each time entry stored when it was made. If 40 hours have been logged at €40/hour and the budget was €4,000, the budget used shows 40% ('€1,600 of €4,000, at the project rate'); from 80% it switches to a warning colour, because there is no longer room for a normal overrun, and above 100% it turns red. With a budget and a rate, the **Cumulative spend** chart switches to euros: the curve of what has been spent, week by week, against the straight line of the budget. The gap between the two and the slope of the curve tell you more than the percentage: 60% used with a flat curve is a calm project; the same 60% with the curve shooting up over the last two weeks is a warning sign.

An important clarification so you aren't misled: **that 'budget used' is an internal control estimate, not an accounting figure or a real tax profitability**. It comes from the time logged and a reference rate, not from the invoices and expenses you have actually issued. The project's real money is in **Invoiced** and **Margin**, at the top of the same overview, which add up the invoices and expenses tagged with the project; and if you want it alongside the rest of your business, you can choose that project in the selector above the **invoicing** and **expenses** dashboards, as explained in **organise your invoices and expenses by project**. Budget used helps you keep the hours from getting out of hand; you see the real margin in **Margin**.

Step 5. Use the dashboard to make decisions, not just to look

Tracking is only worth it if it changes something. Three common readings and what to do with each:

- **Low progress and many overdue tasks.** The project really is running slowly, it's not just a feeling. It's time to reprioritise tasks or renegotiate deadlines before more piles up.

- **Time logged well above the estimate.** That work is costing you more than expected. If it's still ongoing, you adjust the scope; if it has already closed, you carry the lesson over to your next quote so you don't underestimate again.
- **Budget used close to or above 100%.** You have spent in hours almost everything the project was worth at your rate. Now is the time to talk to the customer about additional scope, not to find out when invoicing.

Show your customer the project in their portal

'How are things going with my project?' has another answer besides the end-of-month email: let your customer check whenever they like. If you've given them access to your customer portal, you can show them how their project is going and leave each month's report there for them to download.

It works **project by project and is off by default**: showing hours to a customer is a decision you make, not something that happens on its own. Before you start, three things:

- **The customer portal in your plan.** It comes in the same plans as Projects; if you don't have it, you won't see any of this.
- **The project with its customer selected**, in the **Customer** field of its settings.
- **Being the owner or a manager of the project.** They are the only ones who can turn it on and publish its reports.

Turn the project on in the portal

In the project's **Settings** tab, under **General**, below the project details, is the **In the customer portal** card, with the **Visible in the portal of** switch and your customer's name. What you should know about it:

- **It's saved as soon as you change it**, not with the **Save** button for the details above.
- **It can't be turned on without a customer.** The card tells you: 'This project has no customer. Choose one above, in Customer, so you can show it to them in their portal.'
- **If your customer doesn't have access to the portal yet**, you can still leave it on: they'll see it as soon as you give them access. The card warns you about this, with a link to **Give access**.

- **If Projects isn't among what your customer sees in their portal** — because it was unticked in the Portal settings or in their own record — the card tells you that too: even if you turn it on, they won't see it until you enable it in their record, under **Portal › What they see**. **Go to their record** takes you straight there.
- **If you change the project's customer, it turns off automatically**, so that the new one doesn't see what you were showing the previous one.
- The **View as** button followed by your customer's name opens their portal exactly as they'll see it, without notifying them.

You'll find the same switch in the customer's record, on the **Portal** tab: if that customer sees Projects, the **Projects** row lists all of theirs, each with its own switch and with what they see of it. The switch can only be changed on projects you manage; on the rest it appears disabled, and hovering over it tells you that only the owner or a manager can change it.

What your customer sees, and what they don't

The card itself sets it out in two columns, and that's exactly what appears in their portal:

What they see	What they never see
The project description and its progress: how many tasks there are and how many are completed	Who on your team did each thing
Each month, what's completed and what's open, with its hours	Comments, attachments and task descriptions
The monthly reports you publish for them, as PDFs	Your rates, the budget and the amount invoiced

The only exception to the second column is **the reports you publish**: the PDF is the same one as **Download PDF**, so it includes the percentage of the budget used and the agreed total, as before. If the project has no budget or hourly rate, that figure doesn't appear.

In their portal, each project has its own page: **Progress** (the percentage and the completed tasks), **Hours spent** and **Expected delivery**; below that, **Reports**, with the ones you've published for them; and month by month, with arrows, the month's hours, the completed tasks, the ones still open with their hours and the time logged without a task. Each month shows the tasks that had hours logged or were completed in it: a to-do task that nobody has touched doesn't appear. And it's **view and download only**: the customer can't comment on, approve or change anything there. How they see it, with their Home and their menu, is explained in the guide on activating the customer portal.

Publish the month's report

In the **Reports** tab, with the month selected, click **Publish to portal**. **Publish the report for** and the month opens, explaining what you're about to do: the month's PDF is saved **exactly as it is at that moment**, with its hours and its completed tasks, and that's the one your customer downloads.

- **Notify everyone with access by email** is ticked and tells you who: each person with access to that customer's portal receives an email with the **View report** button, which takes them straight to the project. If you don't want to notify them, untick it and they'll find it the next time they log in. If the portal is closed or nobody from that customer has access yet, the dialogue tells you and there's no one to notify.
- **If your customer doesn't have Projects in their portal**, the dialogue warns you that the report is published but they won't see it until you enable it — in their record, under **Portal › What they see**, or in the Portal settings — and so it doesn't offer the email notification.
- **If the project was turned off**, the button says **Turn on and publish**: when you publish, the project is turned on and your customer starts seeing all of it, not just the report.
- **If the month hasn't ended**, it warns you that the report will cover the month so far.

When you publish, the confirmation message tells you how many people have been notified by email. And if you asked for the notification and none was sent, it says so too: 'Nobody has been notified by email: there's no one to notify, or that customer doesn't see Projects in their portal.'

Below the month you can always see its status. When published, it says in which portal and when — 'Published in the portal of' your customer 'on 3 Oct at 10:15.' — and who downloaded it first, with their email and the date, or 'No one has downloaded it yet.'. When unpublished, it tells you whether the project is already visible in their portal or, if it's turned off, that you can turn it on in **Settings** or when you publish a report. And if the project is turned on or has something published but your customer doesn't have Projects in their portal, it says so first of all — 'doesn't see this project or its reports' — with **Go to their record** so you can enable it there or, for everyone, in the Portal settings.

If something changes after publishing

The published PDF doesn't update itself. If you later log more hours to that month or complete tasks, the line below the month warns you — for example, ‘Since you published it, 2 h 30 min more have been logged.’ — and reminds you that your customer **is still seeing the old PDF**. **Republish** saves the current one. Only the PDF falls behind: the project page in their portal, with each month's hours and tasks, updates itself.

Republishing the same month **replaces** the previous one: your customer sees only one, the latest, and not two versions of the same month. The dialogue reminds you of this before you do it. For your customer it's a new report again, and the count of who has downloaded it starts over.

In the ⋯ menu on that line you have **Republish** and **Remove from portal**. Removing it means your customer can no longer see it and **deletes the published PDF**; you can publish it again whenever you like.

Bring in your projects, tasks and hours from another tool

If you're coming from another project management or time tracking tool, there's no need to retype your history: you can import it from **Utilities › Import data**, just like customers or products. There are three types of data, and **they go in this order**, because each one refers to the previous one:

1. **Projects.** One row per project. A project is identified by its name: two rows with the same name are the same project. The customer is entered with their billing name, exactly as it appears in Fube. **You become the owner** of every project you import.
2. **Project tasks.** Each task states its project (by name) and its title; the status and the priority, as in the template's drop-down lists. The assignee is entered with **their Fube email address**, and if they weren't a member of the project, they become one. The status must be enabled in the project: if a task arrives as ‘In review’ and the project doesn't use that column, the row is rejected and the report tells you which one to enable. For completed tasks you can bring in their completion date; without it, the import date is used. **Importing tasks doesn't notify anyone**: nobody receives a hundred ‘you've been assigned a task’ emails.

3. **Project hours.** Each row is a time entry: the person (by their email address), the project and, if it has one, the task, which is looked up **within that project**. Whoever logs the time becomes a member of the project if they weren't already.

Hours can be entered in two ways, and one is enough:

- **With a start and an end**, in the `startedAt` and `endedAt` columns: `04/03/2024 09:00` and `04/03/2024 11:30`.
- **With the day and how many hours**, which is how many tools export them: the day in `startedAt` and the hours in `hours` (`2,5` is two and a half hours). Each person's hours on the same day are placed **from 9:00, one after the other**, in the order of the file, so that they don't overlap.

If a row has neither an end nor hours, it isn't imported: unfinished hours would be a timer that has been running for years. And if it has both, it isn't imported either, so that there aren't two different durations. 'What was done' can be left empty: it is filled in with the task title or, without a task, with the project name. The rate is the one in the row or, if it doesn't have one, the project's.

Hours you already billed with your previous tool have `sí` in the `invoicedElsewhere` column. That way they don't appear as pending in Reports or in **Invoice**, which would offer them to you again, and they still count as billable in the project's profitability. In the Time tab they appear as 'Invoiced elsewhere' with the source 'Imported'.

The person must be registered in Fube. If someone no longer works with you and doesn't have a user account, their rows aren't imported and the report tells you which email address is missing: if you want to keep that history, register them and import those rows again.

Importing the same file twice doesn't duplicate anything: hours are identified by the person, the project and the start time, and in **Create only** mode those that already exist are rejected as duplicates. With years of activity, **try one project first** and check how it looks before uploading the rest.

Edge cases and common errors

- **The dashboard doesn't show any figures.** Completed and overdue tasks are based on tasks, and hours on logged hours. A project without tasks stays at '0 of 0 tasks' in **How it's going**: create them from the **Tasks** tab.

- **The budget says ‘No budget’ or ‘No hourly rate’.** This is expected if the project is missing one of those two fields. The indicator itself links to the project settings; fill them in and it will be calculated.
- **Time logged stays at zero even though the team is working.** The dashboard only adds up the hours logged on the project, with or without a task. If nobody runs a timer or logs hours, there's nothing to add up or cost, and the budget consumed will stay at 0% even with a budget and rate set.
- **Someone who is no longer on the project appears.** Their time still counts, because the work was done: **Hours by person** marks them with ‘Outside the project’ instead of deleting them.
- **You can see projects you're not a member of.** This is expected if you're an owner or administrator of the company: you see and manage all projects as a manager, even if you're not on their list of members. The only thing you can't do is transfer them, which is up to their owner.
- **A column is missing from the board.** It's not a bug: a new project starts with three, and the columns are the **statuses allowed for tasks**. Add the missing one in **Settings**.
- **Invoice won't let you create the invoice.** Check the three conditions: the project needs a customer, your company a default invoice series and the hours a rate, their own or the project's. And if you can't see the button or it's greyed out, either your user doesn't have permission to create invoices, or there are no unbilled billable hours left that month.
- **You can't see ‘Publish to the portal’ or the portal card in Settings.** Only the project owner and managers have them, the project needs a selected customer to publish, and your plan must include the customer portal.
- **You've switched the project on and your customer can't see it.** As well as the toggle, in **Sales → Customer portal → Settings Projects** must be ticked under **What your customers see**, and on their record, if you chose what they see. If that's missing, Fube warns you on the **Settings** card, below the month in **Reports** and when publishing, with the steps to enable it. And, of course, they must have access to the portal and the portal must be open. You can check this with **View as**, which shows you what they see.
- **The percentage your customer sees doesn't match the one in the Overview.** In their portal cancelled tasks don't count, whereas in the Overview they're included in the total. And their hours, like those in the report, are from completed time entries: a running timer doesn't count until it's stopped.

- **You can't see the Projects section.** The module is available on Business and Elite; the Starter and Pro plans don't include it. If your plan does include it and you still can't see it, it's a matter of your user's permissions, not your plan. You can check the plans on pricing.

Frequently asked questions

Is the budget consumed the project's actual profitability? No. It's a control estimate based on time logged multiplied by a reference rate, designed to stop you going over on hours. Actual profitability — what's invoiced minus what's spent — is in **Invoiced** and **Margin**, at the top of the overview, which add up the invoices and expenses tagged with the project.

Is the time logged by the team invoiced automatically? It isn't invoiced automatically, but you can invoice it in two ways: **Invoice** in the Reports tab creates the draft with the month's billable hours you haven't billed yet, and in the Time tab you can select individual time entries and invoice them from **Actions**. You decide what to invoice and when.

Can my customer see how their project is going? Yes, if they have access to your customer portal and you switch the project on in **Settings** → **General**, with **Visible in the portal of** and their name. They see how it's going, each month's hours and tasks and the reports you publish for them; never who did what, nor the comments, nor your rates. It's read-only: they can't comment on or approve anything from there.

If I publish the report and then log more hours, will my customer see them? On the project page, yes: each month's hours and tasks are calculated every time they visit. In the PDF, no: the published one reflects that moment. The Reports tab tells you what has changed since then, and **Republish** replaces it with the current one.

Can I see how many hours each member has put in? Yes: **Hours by person** splits the time logged in the period by person, with their share of the total, and shows zero for anyone who hasn't logged anything. Next to it, **Hours by task**, the tasks that took the most hours.

What changes when I move the period selector? The activity: the five figures at the top (Hours, Completed tasks, Invoiced, Margin and Unbilled), the two charts, Hours by person and by task and the Completed list. **How it’s going** — completed tasks, hours against the estimate and budget — and overdue tasks reflect today's status and don't change, whatever period you look at. Changes are compared with the period before: the same number of days just before, or the same stretch of last month, quarter or year.

How do I hand a project over to someone else? Its owner does it from the **Members** tab: in the row of the person who'll take it on, the crown button, **Transfer project to them**. That person becomes the owner and you become a manager at the same time, and they receive a notification. They must already be a member of the project; if they aren't, add them first.

What does Fube notify me about in a project? About what happens in your tasks and in those you follow: assignments, changes of status, due date, priority and description, comments, mentions, being added to or removed from a task's watchers and the deletion of one you were on. You choose this in **Settings** → **Notifications** for each project. Having your role changed in a project, like being added to it, is always notified.

Can I change the board columns? Yes, but not from the board itself: they are edited in the **Allowed task statuses** field, in the project's **Settings** tab. A new project starts with three (to do, in progress and completed); ‘In review’ and ‘Cancelled’ are added there.

I used to have two tabs, ‘Backlog’ and ‘Kanban’. Where are they? They are now a single tab, **Tasks**, with the view switcher in the toolbar. The old addresses still work: they take you to the new tab.

Why doesn't the budget show a percentage? Because it is only calculated when the project has both a budget and an hourly rate. Until then, the indicator tells you what is missing and links to the settings; fill in both fields and it will be calculated.

Does project tracking change anything in my taxes or AEAT forms? No. Projects are an internal layer for organisation and tracking. Your record books and your tax forms take into account all of the company's documents, without filtering by project. If you have any questions about how it affects your tax return, it is wise to consult your adviser.

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