



Owner's Manual

Setting up Vector Project for your company, and running projects that keep their promises.

Written for the company admin who sets Vector Project up and the project leads who run it. Where someone else's authority differs, the manual says so at the point it matters.

VectorXPro · Accountability. Clarity. Results.

Before you begin

Vector Project is not difficult to use. It asks for an hour of setup, and a project lead who understands one idea before the first request goes out: in Vector, nobody is handed a date. This manual is that hour and that idea, written down.

Read Parts 1 and 2 first. Do Part 3 with the web app open in front of you, then start your first project with Part 4. The rest you can read as the work reaches it.

What you need

- **A computer with a web browser** for setup. People, roles and phase templates live on the web, at vectorxpro.com/project/app.
- **One company admin.** Probably you: someone who knows who reports to whom.
- **Your org chart**, kept under Team setup, Org chart (vectorxpro.com/team), and shared with Vector Operations. Vector Project reads managers from it, and managers matter: by default they sign off their people's work.
- **One real project** to start with. Not a pilot invented for the purpose: a plant move, a rollout, a fit-out, with real handoffs between real people.

How this manual is written

Every instruction is one action. Where the app says **Send request**, the manual says **Send request**: the words match the screen, so you can follow along without translating.

Where you will see this

Boxes like this one flag something that will otherwise cost you time: a limit on who can do what, something that cannot be undone, or a decision worth making on purpose rather than by accident.

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PART 1

What Vector Project actually does

Every piece of work has one owner, who agreed to its date. The schedule is calculated from those promises. When something slips, everyone downstream sees why, and who owns the delay.

Most project plans are drawn top-down. Someone draws the bars, the dates are handed out, and everyone quietly knows which ones are fiction. When the permit is late, the fit-out is late, the move is late and the start-up is late, and by the review meeting the last person in the chain looks like the problem.

Vector Project turns that around. Work is requested, never assigned. The person doing it accepts the date or proposes one they can make. Their work starts when what it needs is verified, and the schedule follows. A late input moves every date after it, and those days are counted as **inherited**, never as the next person's fault.

The five steps every piece of work goes through

- 1 **Request it:** what's needed, from whom, and by when.
- 2 **Promise it:** the owner accepts, or proposes a real date.
- 3 **Work it:** the checklist, files and versions as it moves.
- 4 **Sign it:** someone else signs it complete.
- 5 **Hand it on:** once it's verified, the work waiting on it starts.

A drawing, a quote, a permit, a cutover and a training session all go through the same five steps.

How it differs from Vector Engineer

Vector Engineer is for stage-gate product development, with gate reviews, findings and a Gate 6 report. Vector Project is for every other project with handoffs. It has **phases** to group the work, but no gates to pass: nobody approves moving from one phase to the next, and the lead decides hold, kill and close at any time.

Three words to know

Word	What it means
Date B	The date the owner committed to finish. The promise.
Duration X	The owner's own working time. Their latest start is Date B minus X.
Date A	When a piece of work is needed by the work that depends on it.

Numbers you can quote

Work is numbered from the project's code. FIT-05 is the fifth piece of work on the project coded FIT. Say the number in a meeting or an email and anyone can find exactly the thing you mean.

Why the record is the part you are really buying

Every request, promise, slip, signature and decision is written to the record with who did it and when, and nothing is ever erased. A file attached by mistake is withdrawn with a reason and stays visible, crossed out. A signature covers exactly one version of the work, and that version locks. A project that is killed or closed stays readable, with the reason.

PART 2

Getting in, seats and who does what

Vector Project is invite-only. Your company admin invites people and gives them a seat; nobody makes an account for themselves.

One Vector account

Vector Project uses the same email and password as every Vector app. If your company already runs Vector Operations Pro or Vector Engineer, your people sign in with the accounts they already have; they just need a Vector Project seat.

Accepting an invitation

- 1 Open the newest invitation email from notifications@vectorxpro.com.
- 2 Tap **Choose your password**. It opens a page on the web.
- 3 Type a password of at least 8 characters twice, and press **Accept and choose password**.
- 4 Sign in at vectorxpro.com/project/app.

Use the newest email

Sending an invitation again cancels the earlier email. If a link has expired, the admin sends it again from Settings, People and roles.

Seats

Everyone who signs in to Vector Project uses a seat. People on your org chart who never sign in don't. Settings, People and roles shows who has a seat; need more, write to us.

Who does what

Vector Project has very few roles, and most of them come from the work rather than from a setting:

Role	Who	What it lets them do
Company admin	Named in Vector	Invite people, give and end seats, name leadership and who looks after the phase templates.
Leadership	Named by an admin	See every project. Leadership sees, but doesn't decide.
Templates	Named by an admin	Set up and retire the company's phase templates.
Project lead and co-leads	Chosen per project	Run the team and the phases; hold and resume. The lead also kills or closes.

Role	Who	What it lets them do
Validator	The owner's manager, by default	Sign work Complete. Nobody signs their own work.
Reviewer	Named per piece of work	Sign work Reviewed: the work is right.

Everyone on a project sees all of it, because handoffs cross teams. Managers see any project someone below them is on, and leadership sees every project. A project you can see says why: Lead, Member, Your team or Leadership. Appendix A sets out the rest.

PART 3

Setting up your company

The hour that decides whether the rest feels effortless. Do it on the web, in this order: the org chart, your people, then your phase templates.

3.1 Check the org chart first

Vector Project doesn't keep its own copy of who reports to whom. It reads your company's org chart, shared with Vector Operations, at vectorxpro.com/team under **Team setup, Org chart**. Before you invite anyone, make sure every person has the right manager there.

Why this comes first

By default, the owner's manager signs their work Complete: the first person up the org chart with a Vector Project seat. A missing or wrong manager means work lands on the wrong person to sign from the very first request. Ten minutes here saves a week of confused signatures.

3.2 Invite your people

Open **Settings, People and roles**. It shows who has a Vector Project seat, who is leadership and who looks after the phase templates.

Settings / People

People and roles

Who has Vector Project, and who is leadership or looks after the phase templates. Managers come from your company's org chart, shared with Vector Operations: change it in [Team setup](#) → [Org chart](#).

11 of 12 seats used 1 free

11 people have Vector Project.

[Invite someone](#)

WITH VECTOR PROJECT 11

PERSON	MANAGER	LEADERSHIP	PHASE TEMPLATES	SEAT
Ana Souza Controls Engineer · Automation	Omar Haddad	☐	☐	End access...
Dan Okafor Design Engineer · Mechanical	Omar Haddad	☐	☐	End access...
Grace Kim Supplier Quality Engineer · Quality	Mike Brandt	☐	☐	End access...
Jordan Lee Project Engineer · Mechanical	Omar Haddad	☐	☐	End access...
Lena Fischer Technical Writer · Tech Pubs	Mike Brandt	☐	☒	End access...
Maria Chen Product Manager · Product	Mike Brandt	☐	☐	End access...

Settings, People and roles: seats, invitations and company roles

- 1 Choose **Invite someone**.
- 2 Type their first name, last name and work email.
- 3 Send the invitation. It holds a seat until they accept.

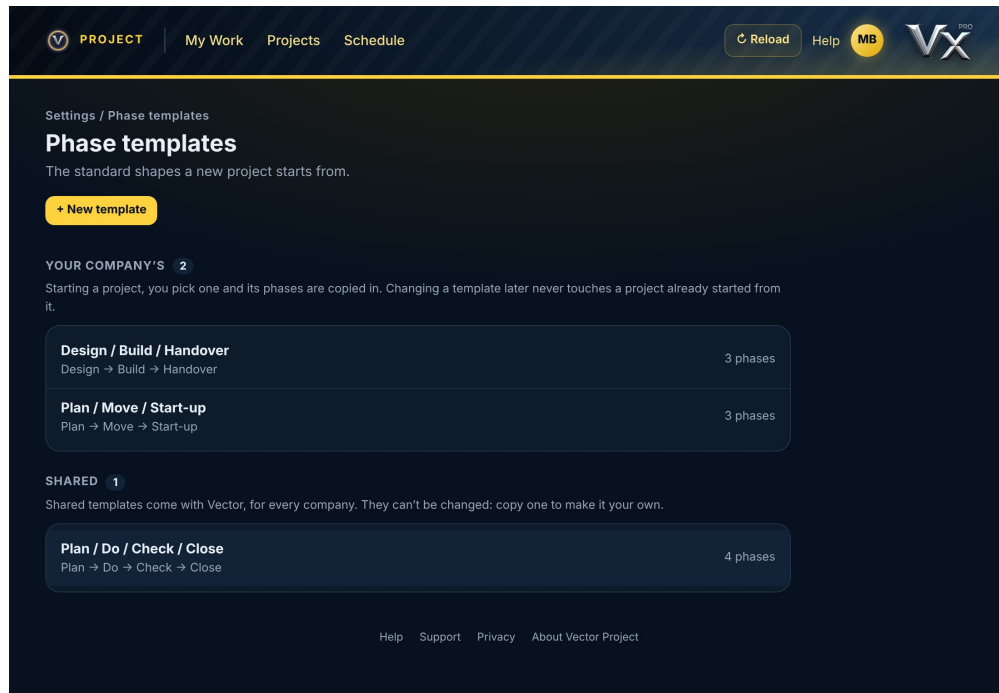
Invite the managers as well as the people who do the work. A manager without a seat can't sign, so the signature passes further up the org chart.

3.3 Name leadership and who looks after templates

Under **Company roles**, switch on **Leadership** for the people who should see every project, and choose who looks after the phase templates. Both can be changed at any time.

3.4 Set up your phase templates

A phase template is one of your company's standard shapes of project, such as Design / Build / Handover or Plan / Move / Start-up: phase names in order, each with an optional line on what happens in it.



Settings, Phase templates: your company's standard shapes of project

- 1 Go to **Settings, Phase templates**.
- 2 Choose **New template**. Give it a name and, if you like, a line on when to use it.
- 3 Add its phases, and drag them into order.
- 4 Choose **Save**.

Shared templates come with Vector and can't be changed: open one and choose **Copy to edit** to make your company's own. A template you no longer want is **retired**: it comes off the New project list, and projects started from it keep their phases.

Templates are copied, not linked

Starting a project copies the template's phases into it. Changing a template later never touches a project already started from it, so improve them freely.

PART 4

Starting a project

Anyone with a Vector Project seat can start a project. Give it a short code, a lead, a target finish and a team.

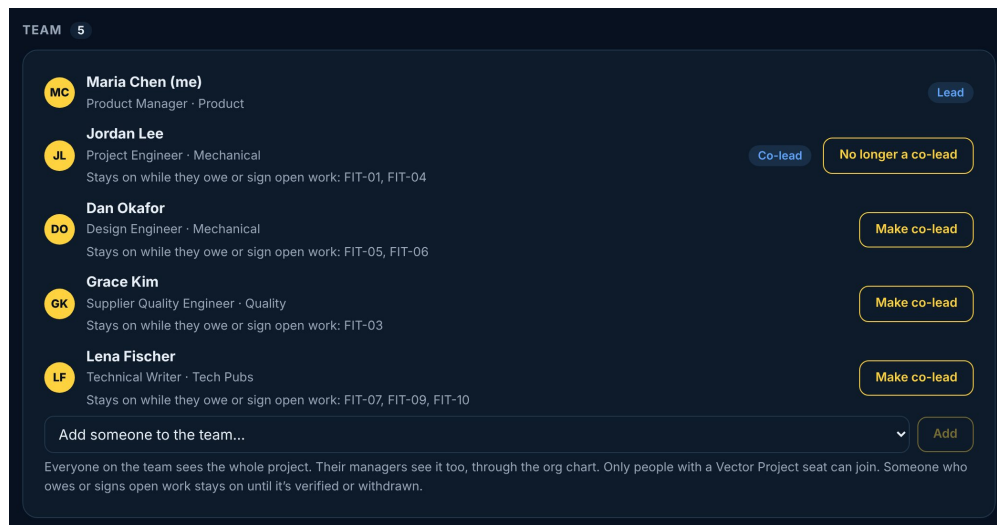
4.1 Start it

- 1 On **Projects**, choose **+**.
- 2 Give it a name, a short code (FIT, MOV2) and an objective.
- 3 Pick a phase template, or **No template** and type the phases, or leave it without phases.
- 4 Choose the lead and the target finish.

If you name someone else as lead, you stay on as a co-lead. The code is what every piece of work is numbered from, so keep it short and recognisable.

4.2 Build the team

Only people on the project's team can be asked for work, so add them before the first request. The lead, co-leads, their managers and company admins add people, make co-leads and take people off.



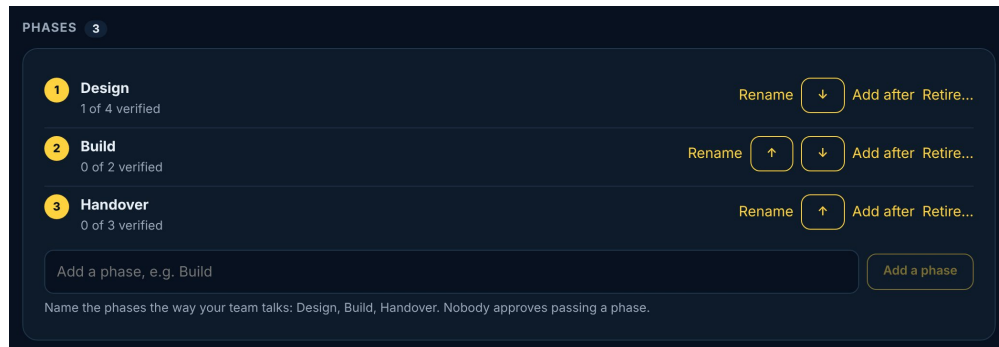
A project's team: the lead, co-leads and members

Coming off a team

Someone who still owes or signs open work can't come off until it's handed on, and the lead can't come off the team at all. Hand the work on first.

4.3 Phases, if you want them

A phase only groups work. Nobody approves passing one, and work in a later phase can start whenever its inputs are ready. Phases are optional, and any piece of work can be Not in a phase.



A project's phases, with the work in each

The lead, co-leads, their managers and company admins add, rename and reorder phases. A phase you no longer need is **retired**, and you choose where its work goes. A retired phase is never deleted.

PART 5

Asking and promising

Work you create for yourself is committed at once. Work you ask of someone else is a request: nothing is on their plate until they say yes.

5.1 Ask for work

The screenshot shows the 'New work' form in the Vector Project application. The form is titled 'New work' and is part of the 'FIT / New work' section. It contains two main sections: 'THE WORK' and 'ACCOUNTABILITY'. 'THE WORK' includes fields for 'Project' (FIT - Office fit-out, Level 3), 'Title' (Meeting room AV spec), 'What exactly is delivered' (Screens, cameras and speakers for the four meeting rooms, with a quote.), 'Kind' (Document), and 'Phase' (Design). 'ACCOUNTABILITY' includes 'Owner' (Dan Okafor) and 'Validated by' (Omar Haddad - Engineering Manager). There is a checkbox for 'Someone reviews it too' and a note explaining the request process.

New work: what's delivered, the owner, the date and the definition of done

- 1 Choose + on My Work, or **New work** on a project.
- 2 Give it a title, what exactly is delivered, and its phase.
- 3 Pick the owner. Only people on the project's team can be asked.
- 4 Set the date it's due (Date B) and the definition of done, one item per line.
- 5 Send the request.

Want someone to check the work is right as well as complete? Name a **reviewer** when you ask: they sign **Reviewed** too.

5.2 Answer a request

Open the request and choose **Respond**. There are four answers:

- 1 **Accept**, with your working time (Duration X). You're committed to the date.
- 2 **Propose another date**, with a note saying why.
- 3 **Ask a question**, if you need to know more first.
- 4 **Decline**, with a reason.

YOUR MOVE

Maria Chen is asking you to commit to this by Jan 21, 2027.

Accept **Propose a new date** **Ask a question** **Decline**

My working time (days)
6

I must start by Jan 15, 2027. Accepting commits you to Jan 21, 2027. Your clock starts when your own inputs are verified.

Accept

Answering a request

The honest date is the useful one

A proposed date is not a refusal. A date you can actually make is worth more to everyone downstream than one you accepted to be polite and will miss.

5.3 When your request comes back

If the owner proposed a date, accept it or push back. If they asked a question, answer it and the request goes back to them. If they declined, ask someone else on the team, or withdraw the request. A withdrawn request stays on the record as Withdrawn.

YOUR MOVE

Dan can deliver by Dec 29, not Dec 17.

"The desk supplier quotes ten weeks from order"

Accept the new date **Push back**

Ask someone else... **Ask them**

Ask someone else lists this project's team. To ask someone new, add them to the team on the project page first.

Withdraw request...

Deciding on an answer

5.4 Asking for what your work needs

On your own work, **Request what I need** asks someone for a prerequisite and links it to your work, needed by a date (Date A). **Link existing** ties in work that already exists: if its owner's date is already early enough, the link is live at once; if not, they're asked to deliver earlier and can agree or keep their date, and the conflict shows.

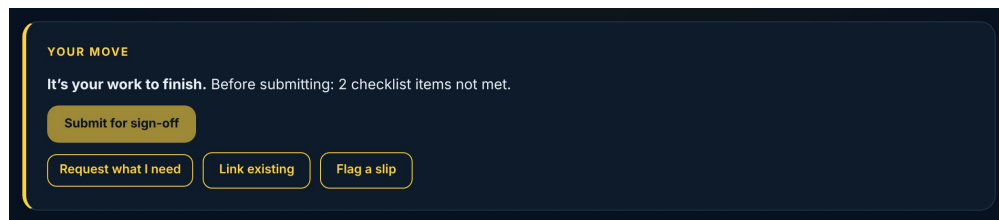
PART 6

Doing the work and proving it

Nothing is done on a word. It is done on a signature, on exactly the version that was checked.

6.1 Start, and tick off the checklist

When your inputs are ready, choose **Start work**. Tick the definition-of-done items as you meet them. Only the owner ticks them.



Doing the work: the checklist, files and what you're waiting on

6.2 Attach the work

- 1 Open your work and scroll to **Files**.
- 2 Choose **Attach files** and pick one or more, or take a photo.
- 3 Add a caption if it helps, like "Rev B, fire exits added".
- 4 Choose **Add version**.

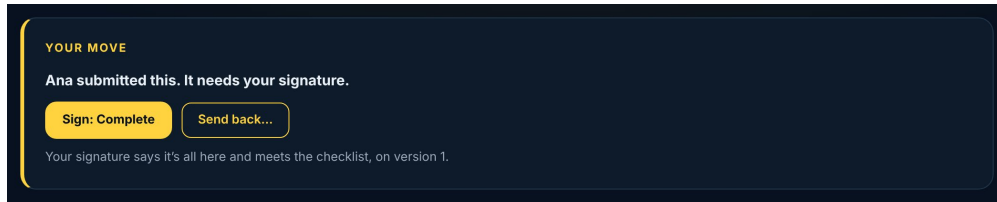
Files you add together are one version, and nothing is overwritten. For physical work, a photo of it done is the usual proof. A wrong file is **withdrawn** with a reason and stays on the record, crossed out. A version someone has signed is locked.

6.3 Flag a slip early

If your work will take longer, choose **Flag a slip**: how many days and why. It adds to your working time and keeps your first promise on the record. A slip flagged five or more days before the due date counts as **early warning**; one to four days is short notice; on or after the due date is a surprise.

6.4 Submit, and sign

When the work is attached and every checklist item is ticked, choose **Submit for sign-off**. If something is missing, the work page says what.



Signing: Complete by the validator, Reviewed by a named reviewer

Signature	Who	What it says
Complete	The validator: by default the owner's manager	It's all here and meets the checklist.
Reviewed	A reviewer, only if one was named	The work is right.

Once every signature needed is on the current version, the work is **Verified** and the work waiting on it can start. Nobody signs their own work.

6.5 Send back

If the work isn't right, the validator or reviewer chooses **Send back** and says what needs to change. It goes back to its owner as **Reopened**. The owner attaches a new version and submits again; the old version stays on the record. Sending back moves no dates: if the rework will run late, the owner flags a slip.

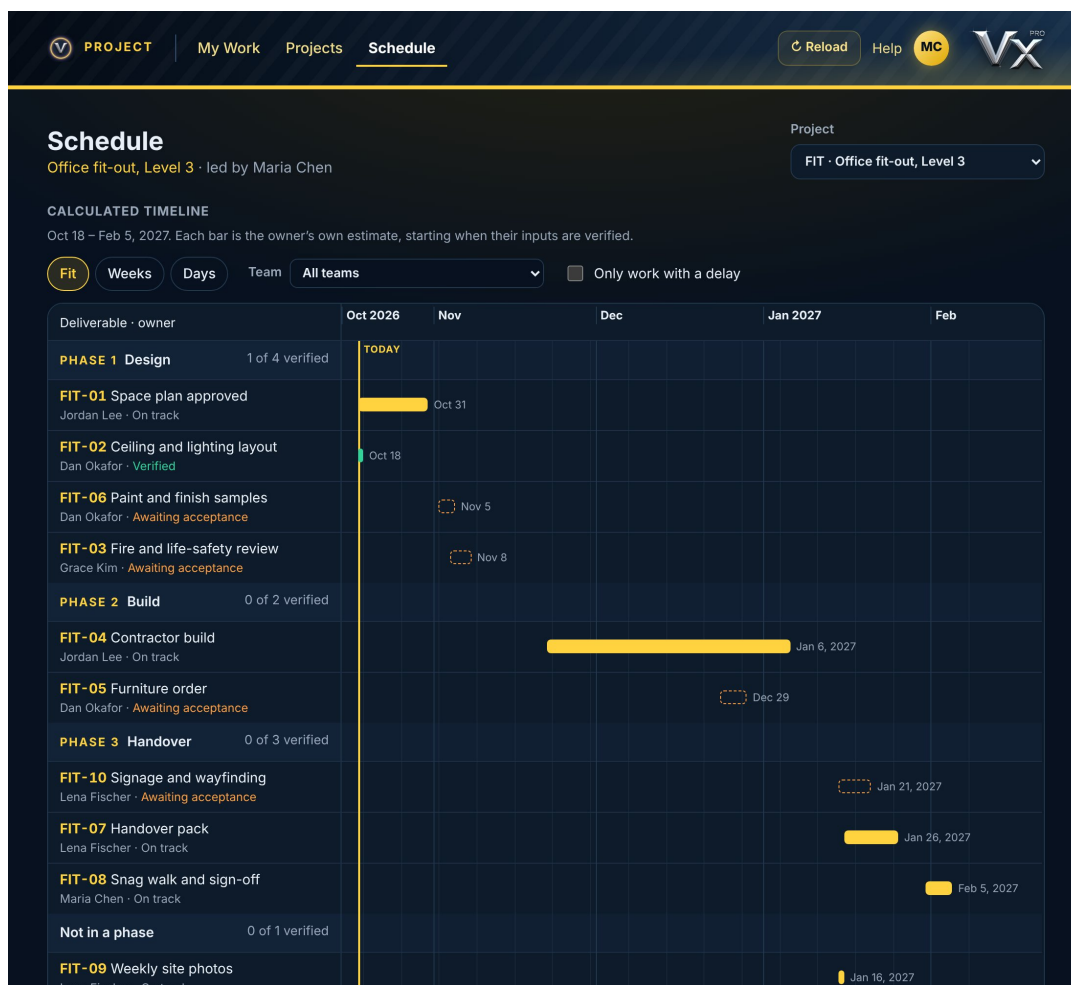
PART 7

The schedule, risk and early warning

The schedule is calculated, never drawn. Every late day belongs to someone, and the report says whose.

7.1 Calculated from promises

Each piece of work starts when its inputs are verified and takes its owner's working time. If an input arrives late, the work's due date moves by the same number of days. The Schedule shows one project's work as bars, from the project you last opened.



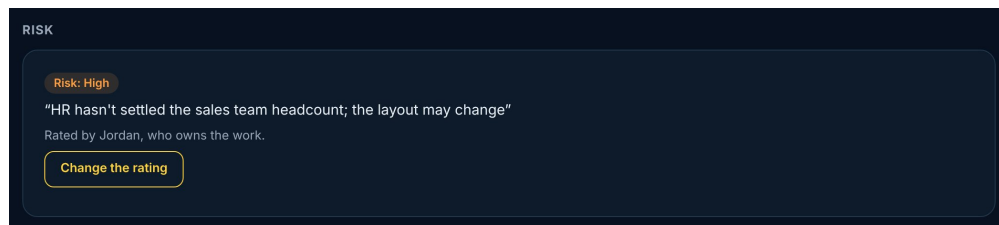
The Schedule: bars calculated from each owner's promise

7.2 Inherited or owned

Days late because an input was late are **inherited**: not the owner's delay. Days late on the owner's own work are **owned**. A link whose work will arrive after its Date A is a **date conflict**, and shows on My Work before it becomes a late day.

7.3 Rating the risk

On your own work, choose **Rate the risk**: Low, Medium, High or Critical. High and Critical need a line saying why, such as "One supplier, 12-week lead time". Only the owner rates their work, and every change goes in History.



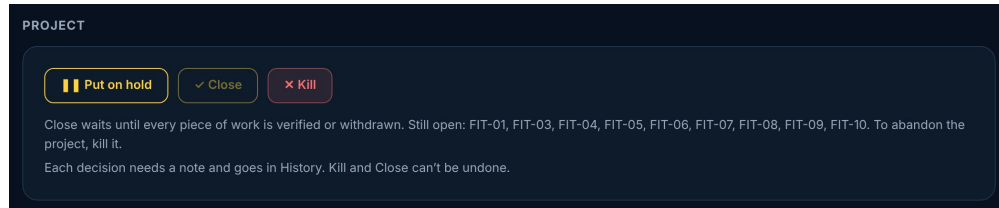
The early-warning card on a project page

Each project page has an **early-warning card**: promises kept, how slips were flagged, the days slipped by cause, and the open work rated High or Critical. It reports by handoff and cause, never as a ranking of people.

PART 8

Holding, killing and closing a project

Project has no gates, so the lead decides, at any time, from the Project card on the project page.



The Project card: Put on hold, Resume, Kill, Close

8.1 Hold freezes the clock

- 1 On the project page, choose **Put on hold**.
- 2 Say why in the note. It goes in History with your name.
- 3 When it's time, choose **Resume**.

While a project is on hold nothing starts the clock or moves a date. Questions, declines, files, submitting and signing still go through. On Resume, every open date moves by the days on hold, and those days count against nobody.

8.2 Kill or close

	Kill	Close
For	A project being stopped, or entered by mistake	A project that's done
Waits for	Nothing	Every piece of work verified or withdrawn
Open work	Withdrawn, never erased	None left
Afterwards	Read-only; the team still sees it	Read-only; the team still sees it
Who	The lead, anyone above the lead, or an admin	The same

Neither can be undone

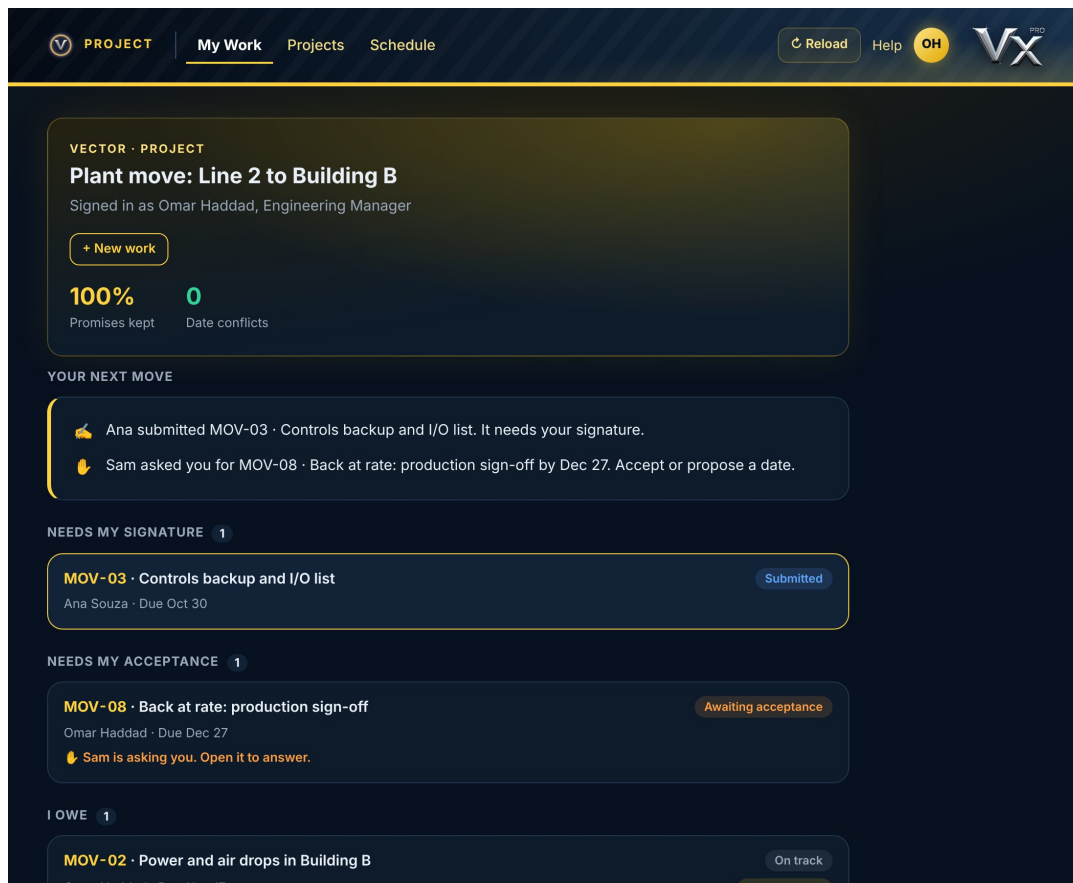
A killed or closed project can't be reopened. The lead and co-leads hold and resume; only the lead, someone above the lead, or a company admin kills or closes.

PART 9

Running it week to week

Once it's set up, Vector Project runs on one habit: open My Work, and do the top of it.

9.1 My Work

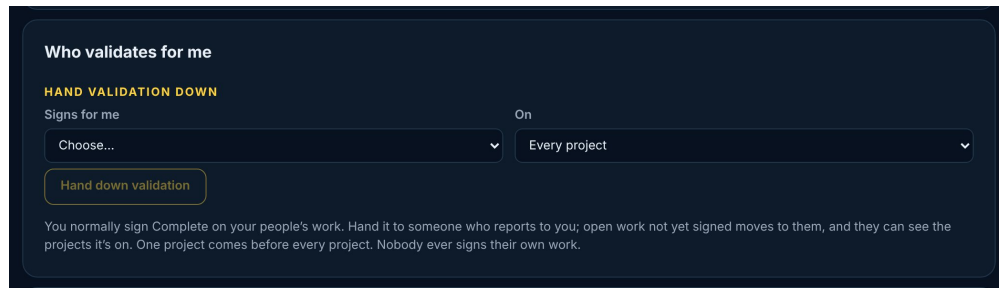


My Work: promises kept, date conflicts, your next move and the lists

The **Your next move** card at the top picks the three most urgent things. Under it are the lists: Needs my signature, Sent back to me, Needs my acceptance, Asked to deliver earlier, Needs my decision, I owe, Waiting on me, I'm waiting on and Recently done.

9.2 Handing signing down

As a manager you sign Complete on your people's work. In **Settings, Who validates for me**, pick someone who reports to you and has a seat, for every project or one, and choose **Hand down validation**. Their open, unsigned work moves to that person at once; **End** moves it back.



The screenshot shows a settings panel titled "Who validates for me". Below the title is a section labeled "HAND VALIDATION DOWN" in yellow. Under this, there are two labels: "Signs for me" and "On". Below "Signs for me" is a dropdown menu with "Choose..." selected. Below "On" is a dropdown menu with "Every project" selected. There is a yellow button labeled "Hand down validation". At the bottom, there is a paragraph of explanatory text.

Who validates for me

HAND VALIDATION DOWN

Signs for me: Choose... On: Every project

Hand down validation

You normally sign Complete on your people's work. Hand it to someone who reports to you; open work not yet signed moves to them, and they can see the projects it's on. One project comes before every project. Nobody ever signs their own work.

Settings, Who validates for me

9.3 A weekly routine for the lead

- Open the project's **early-warning card**. Ask about any slip flagged as a surprise, and any open work rated Critical.
- Look at **date conflicts** on My Work. Each is a conversation to have this week, not a late day next month.
- Check **Needs my decision**: a request that came back with a date or a question is waiting on you, not them.
- When the last piece of work is verified, **Close** the project with a line on how it finished.

APPENDIX A

Who can do what

Action	Who
Invite people, give and end seats	Company admins
Name leadership and who looks after templates	Company admins
Set up and retire phase templates	Company admins and whoever looks after templates
Start a project	Anyone with a seat
Add and remove team members, make co-leads	The lead, co-leads, their managers, company admins
Add, rename, reorder and retire phases	The lead, co-leads, their managers, company admins
Move work to another phase	The owner, the person who asked, or whoever manages the team
Ask for work	Anyone on the project's team
Tick the checklist, rate the risk, flag a slip	The owner only
Sign Complete	The validator: the owner's manager by default, or whoever they handed it down to
Sign Reviewed	The reviewer named on the work
Send back	The validator or the reviewer
Put on hold, resume	The lead and co-leads
Kill or close	The lead, anyone above the lead in the org chart, or a company admin
See every project	Leadership

APPENDIX B

Setup checklist

Before you invite anyone

- ☐ Every person has the right manager in Team setup, Org chart
- ☐ Managers who will sign off work are on the list to invite

People and roles

- ☐ Invitations sent from Settings, People and roles
- ☐ Leadership switched on for the people who see every project
- ☐ Someone named to look after the phase templates

Templates

- ☐ Your company's standard shapes of project saved as phase templates
- ☐ Shared templates you want copied with Copy to edit

The first project

- ☐ Started with a short code, a lead and a target finish
- ☐ Team added before the first request
- ☐ First requests sent, each with a definition of done
- ☐ Everyone on the team has the quick card

APPENDIX C

The words Vector uses

Word	What it means
Request	Work asked of someone. Nothing is committed until they answer.
Date B	The date the owner committed to finish.
Duration X	The owner's own working time.
Date A	When the work that depends on it needs it.
Definition of done	The checklist the owner ticks before submitting.
Version	Files added together. Nothing is overwritten.
Complete	Signed by the validator: it's all here and meets the checklist.
Reviewed	Signed by a named reviewer: the work is right.
Verified	Every signature needed is on the current version.
Reopened	Sent back, with a note on what needs to change.
Slip	Extra days the owner flags on their own work.
Inherited	Days late because an input was late. Not the owner's delay.
Date conflict	A link whose work will arrive after its Date A.
Phase	A way to group work. Nobody approves passing one.
Phase template	A company's standard shape of project, copied into a new one.
Withdrawn	Taken back, never erased; it stays on the record.
Hold, Kill, Close	Pause the clock; stop a project; finish one.

Every screen, step by step: vectorxpro.com/project/help. Stuck? support@vectorxpro.com. A person reads every message.