

Projects: Front-end overview

Archived

The article below is for Projects 2.0 only. For more information, check out [Projects: Admin overview](#).

For Projects 2.1+, check out our guide on [Projects v2.1+](#)

Included in this article:

- [Overview of Projects](#)
- [How to create a new project](#)
- [Elements within a project](#)

1 - Front end of projects


On the landing page of the Projects application, you have the options to view:

(1) Projects Home, (2) Tasks, and (3) Companies.

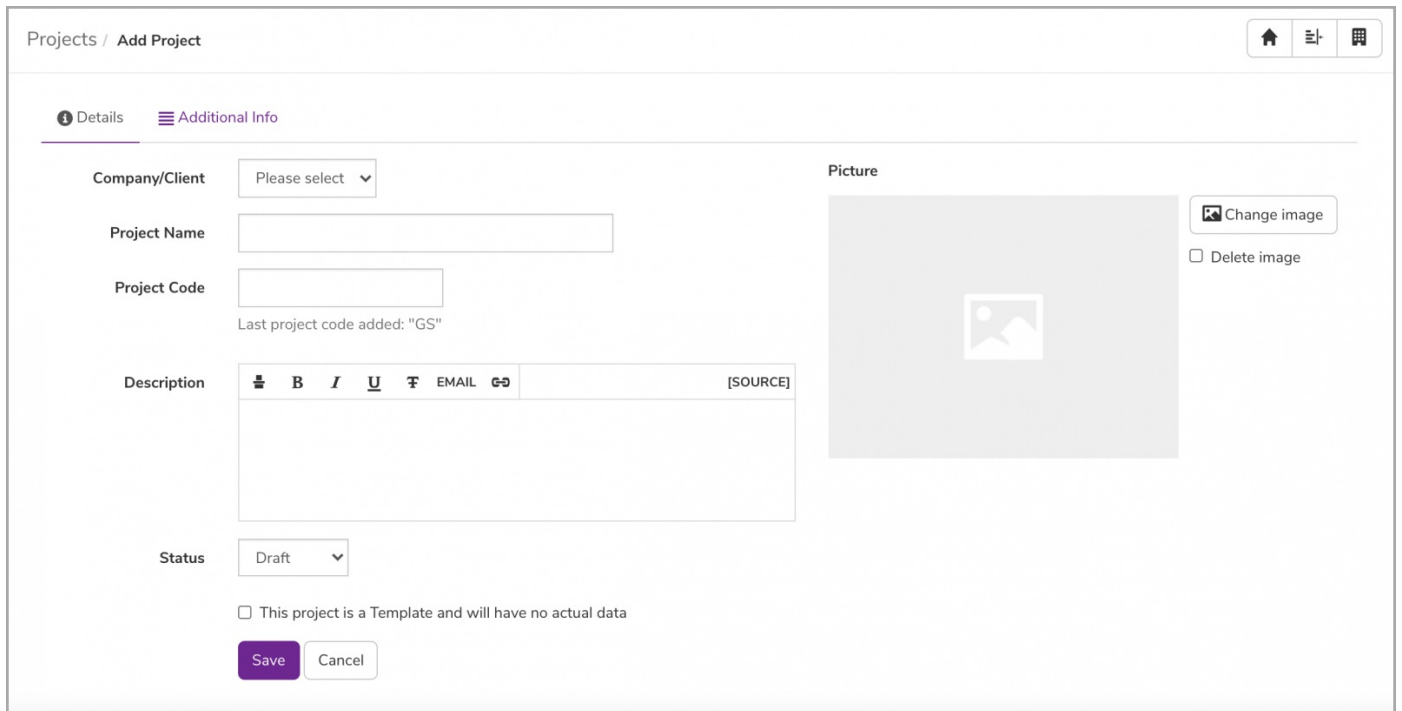
The screenshot displays the 'Projects' application interface. On the left, a sidebar lists filter categories: Active (3), Following (0), Draft (0), On Hold (0), Archived (0), and Templates (0). A search bar labeled 'Search projects...' is positioned above three project cards. The first card is 'Employee wellbeing...' (CLA-01), the second is 'Getting Started' (GS), and the third is 'Recruitment' (CLA-02). In the top right corner, there are navigation icons for Home, List, and Grid, along with a 'New Project' button. Red arrows and numbered circles (1, 2, 3) point to these navigation elements.

- (1) **Projects:** You will see a summary of any existing projects, as well as a category filter on the left-hand side to show projects only within that category.
- (2) **Tasks:** You can view a breakdown of all of the tasks in a project including specific tasks assigned to yourself. You can also view tasks according to their current status using the status filter.
- (3) **Companies:** You can view a list of existing company names. (This function is optional and may only be relevant depending on the type of project e.g. project on behalf of another company).
- Reminder:** You will only be able to see projects/tasks that are you a team member of unless you have been granted the 'Full Permission' option from the back end.

2 - Creating a project

If you have permissions to create a project, you will see the  button. You can then choose whether you would like to (1) build a new project from scratch or (2) copy from an existing one.

(1) To build a project from scratch, you'll need to enter the following information:



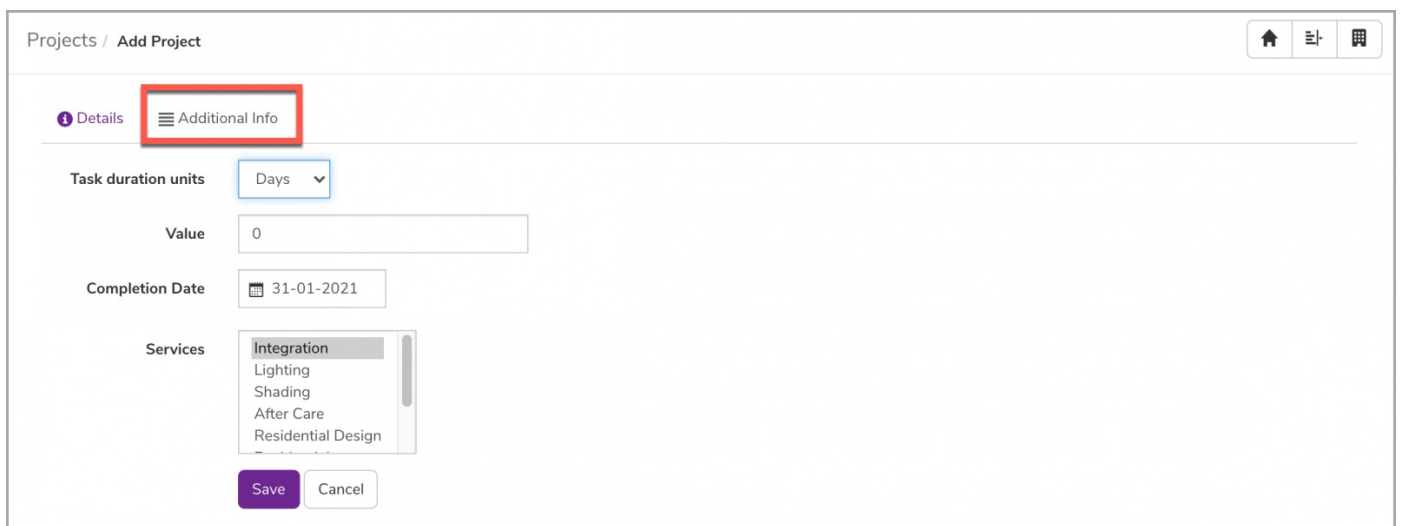
The screenshot shows the 'Add Project' form in the 'Details' tab. The form includes the following fields and options:

- Company/Client:** A dropdown menu with 'Please select' as the current value.
- Project Name:** A text input field.
- Project Code:** A text input field with a note below it: 'Last project code added: "GS"'. There is also a '[SOURCE]' link.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, email, and link.
- Status:** A dropdown menu with 'Draft' as the current value.
- Picture:** A large image placeholder with a 'Change image' button and a 'Delete image' checkbox.
- Save/Cancel:** Two buttons at the bottom of the form.

You can also upload a thumbnail image should you wish.

Please note: You can check the This project is a Template and will have no actual data option if you would like to use this project as a template for future purposes.

Before saving your project, navigate to the 'Additional info' tab to find the following options:



The screenshot shows the 'Add Project' form in the 'Additional Info' tab. The 'Additional Info' tab is highlighted with a red box. The form includes the following fields and options:

- Task duration units:** A dropdown menu with 'Days' as the current value.
- Value:** A text input field with '0' as the current value.
- Completion Date:** A date picker showing '31-01-2021'.
- Services:** A list of services including 'Integration', 'Lighting', 'Shading', 'After Care', and 'Residential Design'.
- Save/Cancel:** Two buttons at the bottom of the form.

These options can be used/interpreted depending on the specific needs of your project:

- **Task duration units:** The unit corresponding to the proposed (anticipated) duration of how long a task will take to be completed.

- **Value:** Number (i.e. cost of the project)
- **Completion Date:** The date the project should be completed.
- **Services:** The type of service the project is related to. This metadata can be managed via Admin > Metadata > Projects.

(2) To create from an existing project, simply select which project you would like to copy from.

New Project
✕

Start blank project
 Copy from existing project

Select project

Employee wellbeing initiatives
▼

view project

Include

- Task assignment
- Team
- Folders only
- Files and folders


Cancel
Create Project

This option is useful if you would like your project to share certain characteristics as it allows you to specify what components you would like to copy.

3 - Project Elements

By clicking on a project, you can view the current status of the project as well as a traffic light function indicating the priority level of the project.

Projects / Project Details



CLA-01
Claromentis

Employee wellbeing initiatives

Add a project update

A project to discuss and create some initiatives to improve employee wellbeing

0% Completed

Tasks 4
 Team 15
 Discussion 2
 Files
 History

✎
▶
i



Live
R
A
G

Reminder: Project Role permissions will determine whether you have the option to edit the status and priority level, as well as add a project update.

All members of a project will see the following:



CLA-01 Claromentis

Employee wellbeing initiatives  Live 

A project to discuss and create some initiatives to improve employee wellbeing

0% Completed

 Tasks 4  Team 15  Discussion 2  Files  History

- **Tasks:** A detailed list of tasks within the project.
- **Team:** A list containing information on current project team members (e.g. Name, Project Role, Responsibility, Contact Details). Those with permissions are able to add/delete team members as needed.
- **Discussion:** A communication panel you can use to communicate with other team members about the project.
- **Files:** A document storage containing all your project items under the Documents application.
- **History:** A full summary of all the activities that have occurred within the project.