Setting up a Project

*Article related to Projects version 2.0+*

This article will cover the new features in Project 2.0 showcasing how to set up your project from the front-end, including how to define your team members and how to create tasks.

Included in this article:

1. Create a project
2. Organise a project
3. Move a project forward

Create a project

The project can be created by simply clicking on the **+ New Project** button:
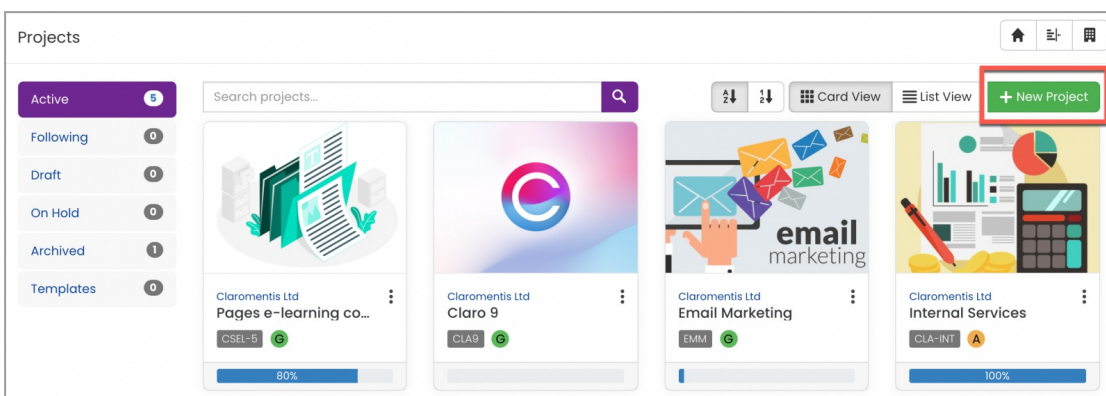
You will be given the option to either create a brand new project or copy an existing project (If you have many similar projects taking place, this may be a handy feature!)

For more information on creating a project, check out our article covering an overview of the front-end of the application here.

Organise a project

- **Team:** An important step in any project is to define the team members who will be part of the project.

Each team member can be assigned specific roles and permissions that reflect the tasks and duties of their particular role in the project.

Defining these roles and permissions is a very crucial step that will determine the overall flow of your project. For more detailed information on the new Roles & Rights feature, head over to our article here.

- **Tasks:** You can start adding some structure to your project by creating different stages of tasks.

You can make responsibility clear by:

(1) Defining the **Assigned to** user

(2) Determining the **Expected duration** and **Due date**

(3) Setting a **Priority** (i.e. Low, Medium, High)

(4) Making a **Private task** allowing the task to only be visible/accessible to the specific team members.

To find out how to set up the progress bar for tasks, click here.

You can also sort and filter your project view. By default, all tasks that have been checked-off (completed) will disappear from the list. However, you can change this by using the toolbar:

Move a project forward

- **Discussion:** The discussion board will allow you to communicate with team members for status updates and overall progress.
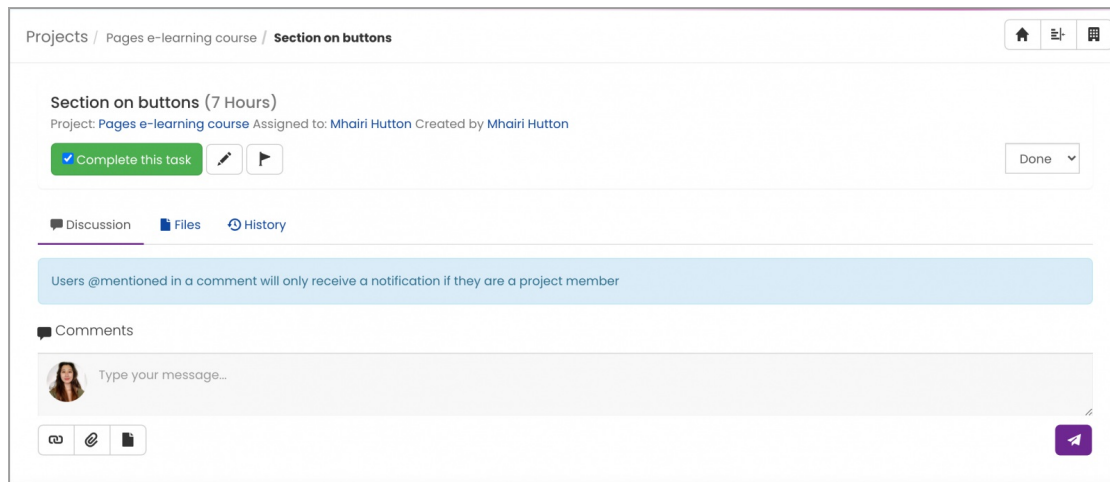

You can also upload files or link certain documents from the Document application in your comment.

Each task also has its own discussion section for more niche conversations specific to the individual task.

All team members will be notified when a comment has been added. You can also @ mention teammates in the discussion board as needed.
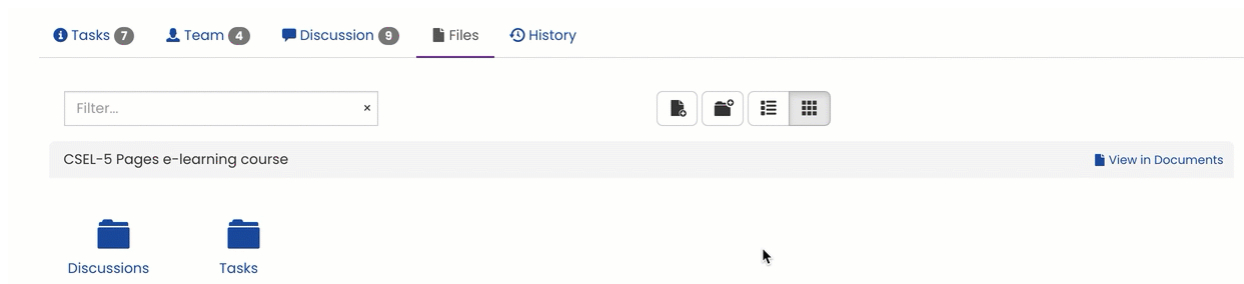
- **Files:** Files will store any documents that have been uploaded to the project.
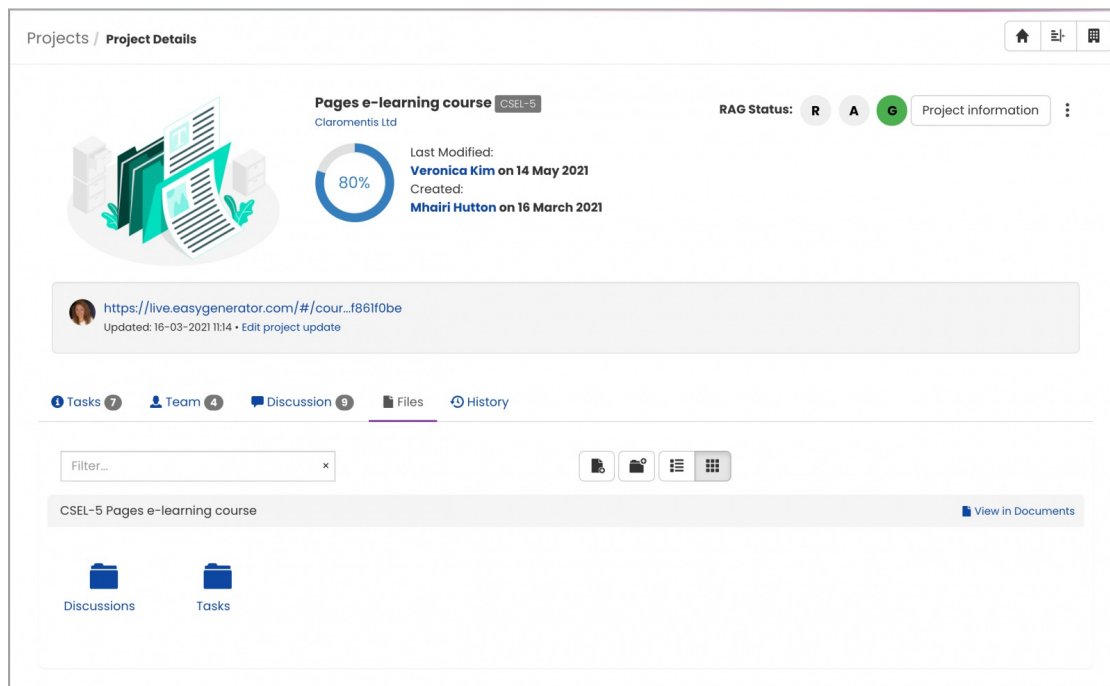
When you first navigate to this area, you will see two existing folders. Any document/files added to a comment or task will be saved within the 'Discussions' folder and 'Task' folder, respectively.

You can add documents or folders straight to Files.

Reminder: All areas of Project v2.0 are heavily dependent on role permissions, so please ensure each user has the correct permissions that fit the purpose of the project.