



Creating and organising a Project

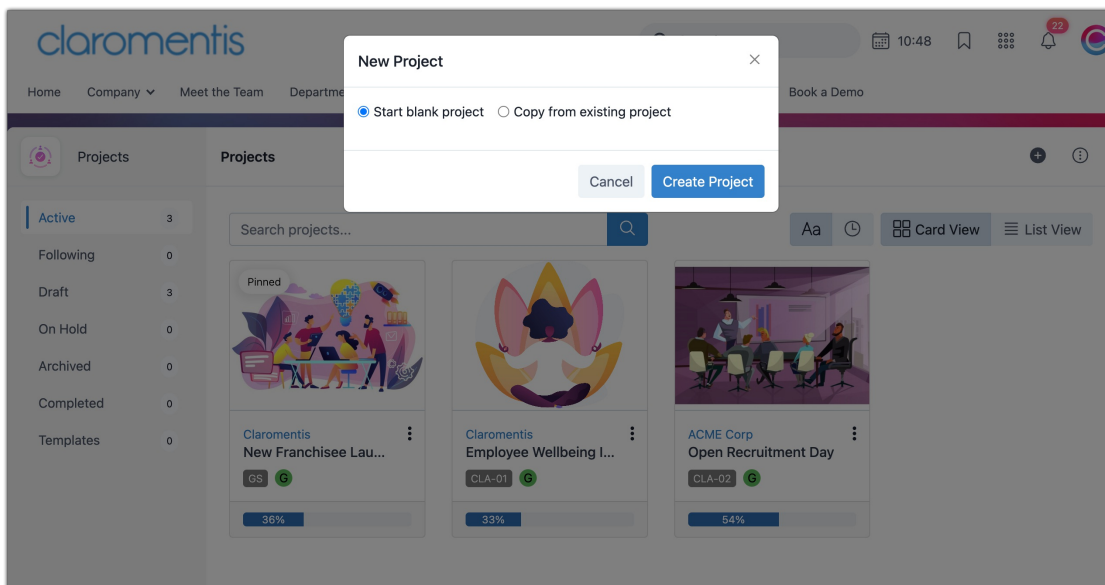
Application administrators of Projects can give users the permission to create projects from the [admin side](#).

Users with this ability will see the cross icon appear on the [Front end](#) of Projects, allowing them to create new ones.

This guide will cover all the steps to create and organise a Project ready for use.

Create a new Project

1. Click the cross icon and make a selection in the pop-up to proceed:



2. The next screen will open the 'Details' tab.

Here, the information about the project can be filled out.

Apart from the Project Name, all fields are optional, so only use those that are needed for your Project.


Projects > Add Project ?

Details | Roles & Rights

Company/Client: Please select ▾

Project Name:

Project Code:
Last project code added: "GS"

Cover Image:  Change image
 Delete image

Description:

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Task duration units: Days ▾

Value:

Completion Date:

Status: Draft ▾

This project is a Template and will have no actual data

Continue Cancel

- **Company/Client:** Select from the dropdown to attribute the Project to a Company (Companies are entered by users in the Company tab on the front end)
- **Project Name: The title of your Project**
- **Project Code:** Give the Project a reference code or number to match your internal processes
- **Cover Image:** Upload an image to appear in the Project itself and on the front end
- **Description:** Provide more information about the Project and its aims
- **Task duration units:** Choose how tasks should be measured - hours, days, custom
- **Value:** Enter a monetary value of the Project
- **Completion Date:** Enter an estimated completion date for the project (can be changed at any time)
- **Status:** Give the Project the appropriate status
- **Template:** Check this box if what you have configured will be used as a template for other new projects to copy from.

3. Once you have filled out all the details, click 'continue', and the 'Rights & Roles' tab will be shown.

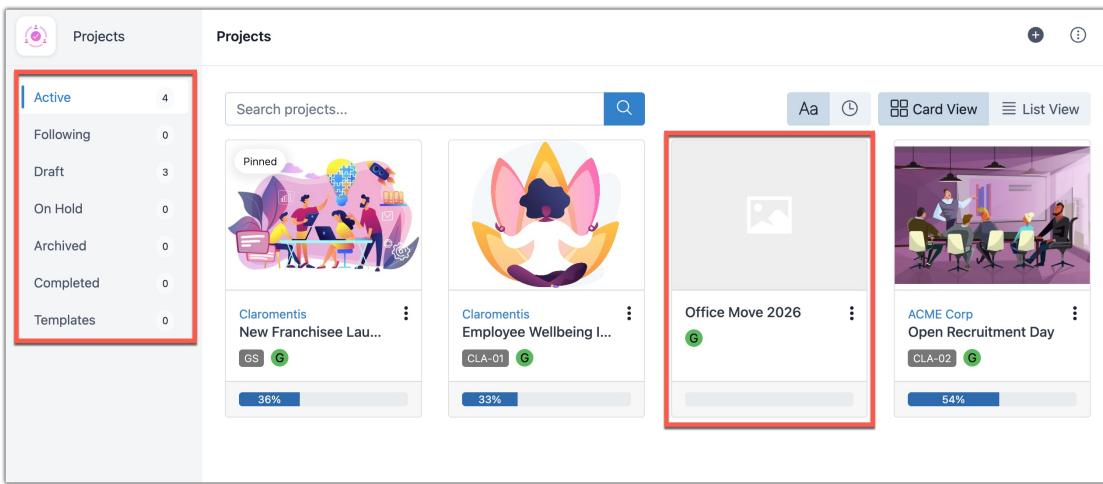
The default [Roles & Rights](#) that administrators have set up on the admin side will have pulled through.

Tweak these as needed to best suit the Project you are making.

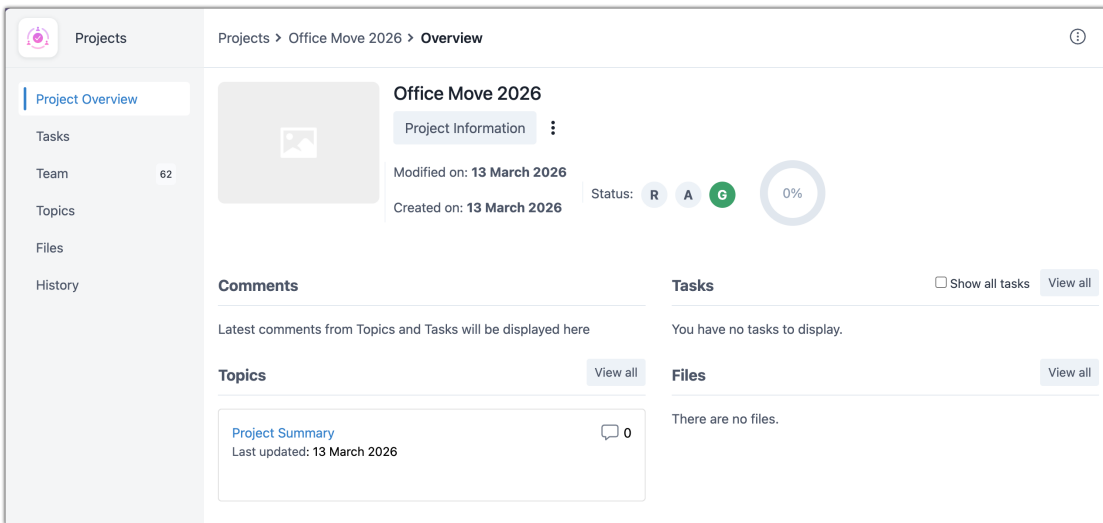
Ensure you click 'save' in each pop-up to apply changes.

4. Click 'Save' in the Rights and Roles tab, and your project will be created

Depending on which status the Project is put into, it will be listed on the front end to users with permissions to view.



Users can click into the Project to begin interacting with it based on which Role they are in.



Organising a project

Now that the Project has been created, the creator needs to check that all other elements they want users to interact with are set up and ready for use.

- Create tasks

In the task tab, use the cross icon to create all the tasks that are needed in the Project.

Consider creating different 'Task Lists' to save portions of tasks under, or just create one list of tasks, whatever suits your Project best.

Projects > Office Move 2026 > Tasks

Project Overview

Tasks 9 of 11

Team 62

Topics

Files

History

Hide Completed List Board

Phase 1

- Moving van booked
17 March 2026 To do
- Collect all rubbish from all rooms
18 March 2026 To do
- Personal items have been removed
18 March 2026 To do
- Furniture has been listed on websites for sale
17 March 2026 To do
- Pack moving van
20 March 2026 To do

Phase 2

- Unload van
24 March 2026 To do
- Set up new space
27 March 2026 To do
- Order any items needed
24 March 2026 To do
- Opening ceremony!
27 March 2026 To do

Mark tasks as private if you only want users with 'View all tasks' permissions to see them; non-private tasks can be seen by users with 'View tasks' rights.

Ensure you set a duration for each task, as this is what allows it to update the overall project progress bar once completed.

Users can mark tasks as complete and in turn update the progress bar shown in the project overview tab.

Add task

List: Phase 1

Task Name: Task Name

Description:

Source

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Assigned to: Select a user Browse

Due date: 📅

Priority: None

Private task
Users can always see tasks assigned to them

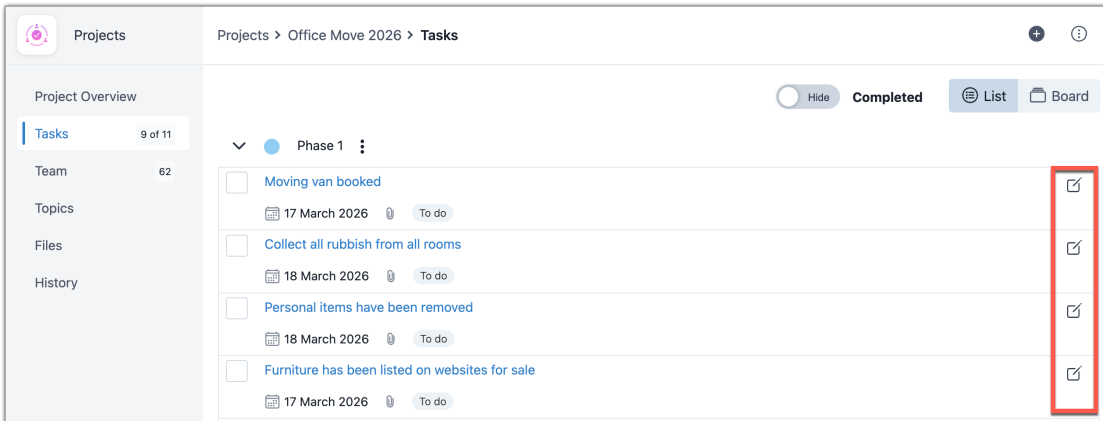
Expected Duration: Days

Back Cancel Save

- Assign Tasks

Assign tasks to users who have been included in the Roles & Rights for the Project.

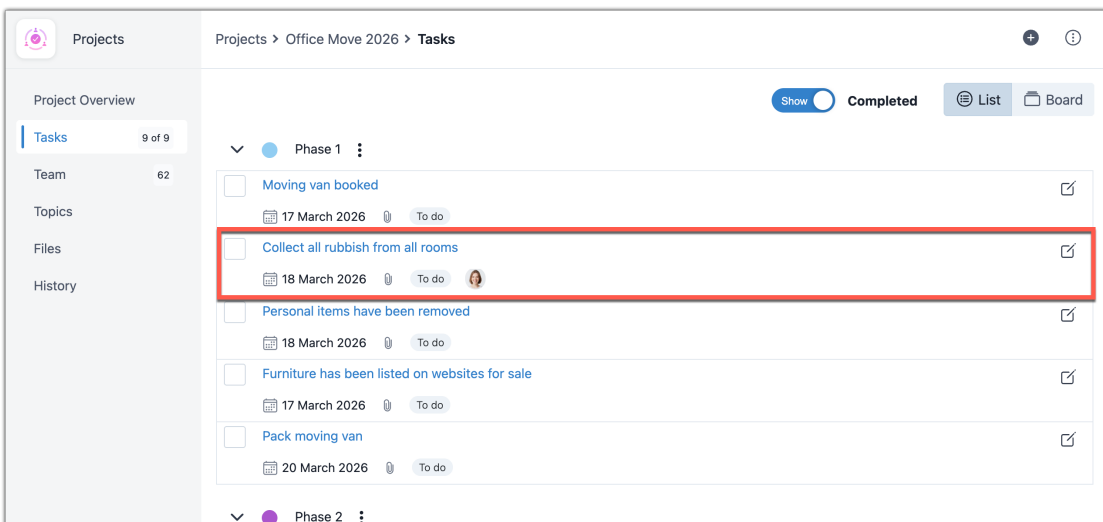
Either assign users as you create tasks, or do this later by clicking the pencil icon to edit them:



Enter the users into the 'assigned to' field and click 'save' to apply.

Users will be notified when tasks are assigned to them, and their profile picture will appear against tasks in the List.

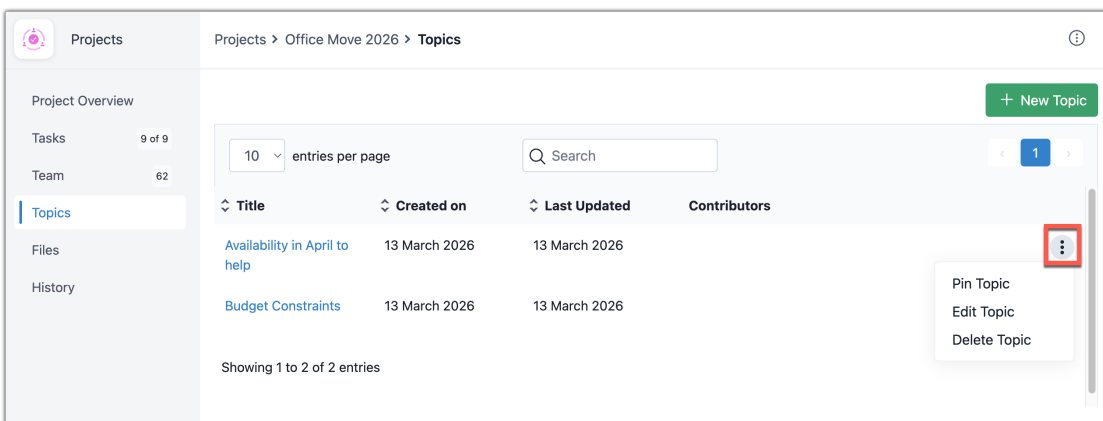
More information about task completion is detailed in [our guide](#) about how Projects are used.



- Create Topics

Topics are discussion areas.

Create them based on your needs and give them titles indicative of what kind of conversation should take place there, e.g. general discussion, budget talks, etc



A 'Project Summary' Topic will be created by default, which you can delete or edit to better suit your purposes.

Click the 3 dots to edit, delete or pin topics.

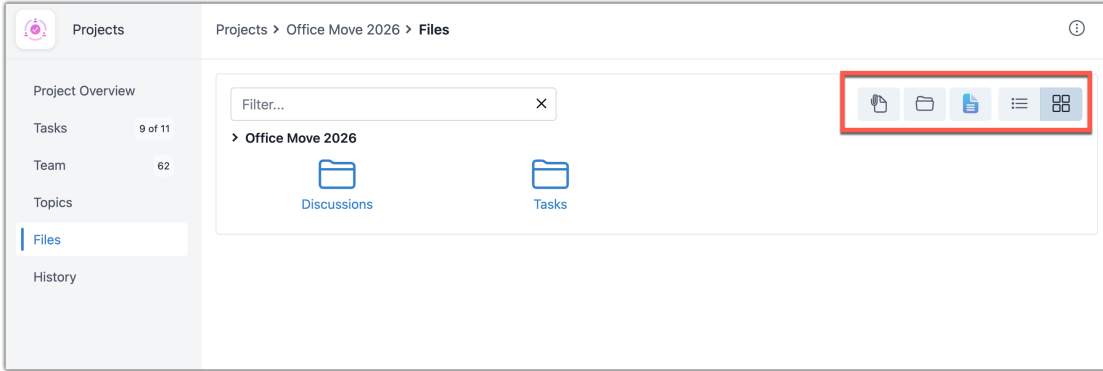
Users with the 'view topic' and 'contribute to topic' permissions will be able to see these and interact with them.

- Upload Files

Ensure any materials that users involved in the project need to see are uploaded here. More uploads can be made at any time by users with 'upload project files' permissions.

The system automatically creates a folder in the Documents application to house content uploaded within a project. There will be a folder for files uploaded to Topics, and those uploaded to tasks. Create any other folders you see fit.

Users can upload to them using the icons shown on the page.



- Project Overview page

The landing page of the project, which users will engage with first. Check all the elements you have set up appear correctly and as you need them. This will update over time as the Project is used.

Now your Project has been set up, read [our guide](#) on how users can interact with it, update its progress and change the project overview page.

