



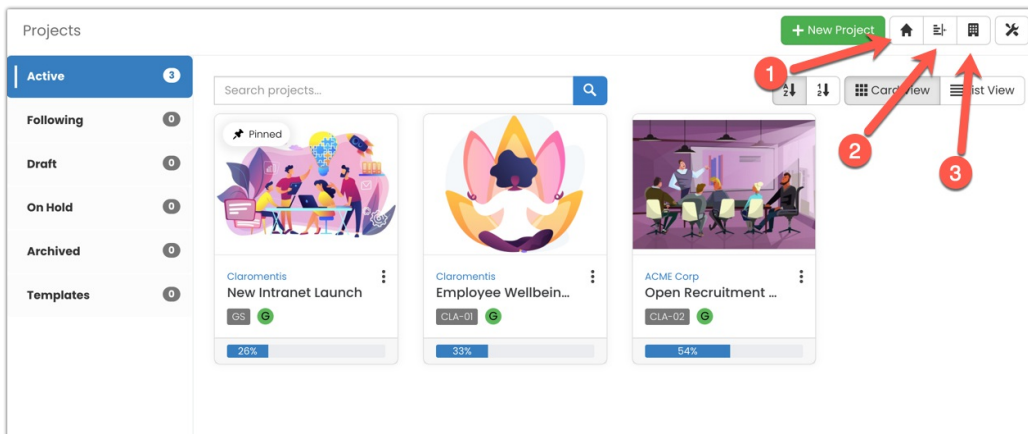
## Projects v2.1+

### Front End

Options remain the same however they have changed position in the layout slightly from previous versions.

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

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



(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.

### Creating a Project

If you have permission to create a project, you will see the **New Project** 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 see the screen below.

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**

**Task duration units** Days

**Value** 0

**Completion Date**

**Status** Draft

This project is a Template and will have no actual data

Continue Cancel

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.

**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.

(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.

## Roles & Rights

Before saving your project, navigate to the **Roles & Rights** tab to fill this out for the users that will be accessing it.

Detailed instructions for can be found [here](#)

Projects / Add Project

Details Roles & Rights

Add project members to the roles below based on the level of permissions you want to assign. If required, additional roles can be created. Specific Rights for each Role can be configured on the Rights tab.

Roles Rights

Add new role

Role	Member
PM	
Senior Team	
Team	
Senior Client	
Client	
Viewer	

Save Cancel

## Project Overview

The landing page of a Project offers a summary of its elements altogether on the right, this view will be specific to each user and details recent activity on the project at a glance.

Tabs on the left can be used to refine the content given to that element.

The current status of the project as well as a traffic light function indicating the priority level of the project.

Projects / Employee Wellbeing Initiatives / Overview

Project Overview

Tasks 6

Team 18

Topics

Files

History

### Employee Wellbeing Initiatives

33%

Last modified on: 7 December 2021

Company: Claramentis

Created on: 11 August 2016

Status: R A G

#### Comments

What about hosting a mental health awareness day? I can recommend some engaging speakers!  
Topic: Ideas  
6 December 2021

I really like the idea of exchanging wellbeing gifts amongst employees.  
Topic: Ideas  
6 December 2021

Thanks Pippa Fraser - primary communication will take

#### Tasks

Communicating changes to the team

#### Topics

Ideas  
Last updated 6 December 2021

Project Summary  
Last updated 23 February 2022

#### Files

Display screen equipment (DSE) workstation checklist.pdf  
Uploaded on: 7 December 2021

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

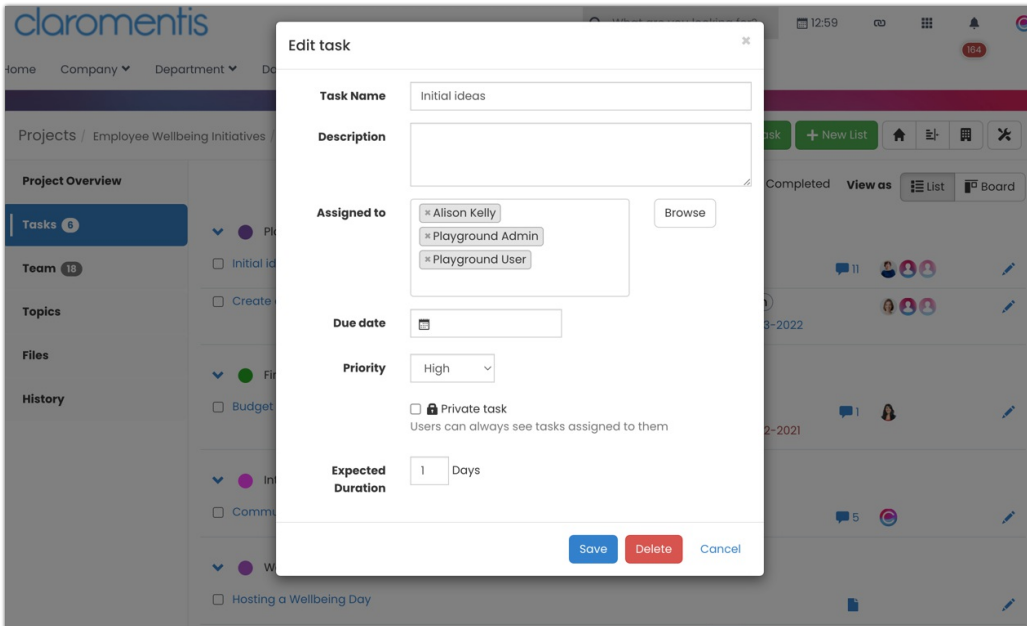
All members of a project will see the following:

- **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.
- **Topics:** A discussion panel you can use to communicate with other team members about the project.

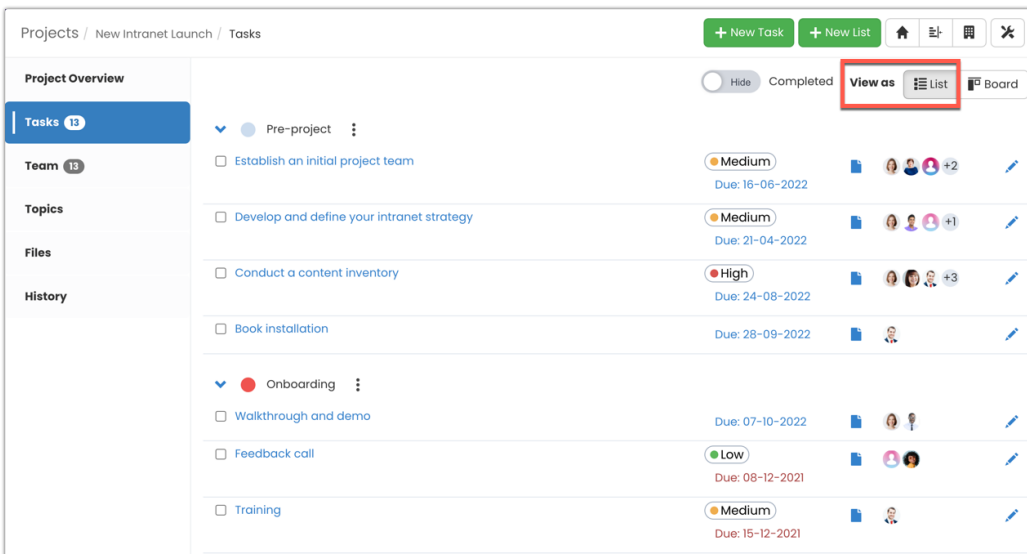
- **Files:** A document storage containing all your project items under the Documents application.
- **History:** A full summary of all the activities that have occurred within the project.

## Tasks

Tasks can be assigned to an individual or multiple users as required.



Users can toggle whether to hide completed tasks and choose to view them as a standard list...



...or in Kanban board style.

Projects / New Intranet Launch / Tasks

+ New Task + New List

Project Overview

Tasks 13

Team 13

Topics

Files

History

To do In progress Done

Pre-project

- Book installation  
Due: 28-09-2022
- Establish an initial project team  
Due: 16-06-2022  
+2 Medium
- Develop and define your intranet strategy  
Due: 21-04-2022  
+1 Medium
- Conduct a content inventory  
Due: 24-08-2022  
+3 High

Onboarding

- Feedback call  
Due: 08-12-2021  
Low
- Walkthrough and demo  
Due: 07-10-2022
- Training  
Due: 15-12-2021  
Medium
- Launch planning  
Due: 16-12-2021

## Topics





This area allows the creation of multiple topics your Project may require for team members to comment under.

Projects / Employee Wellbeing Initiatives / Topics

+ New Topic

10 entries per page

Search

Title	Created	Last Updated	Contributors
<a href="#">Ideas</a>	6 December 2021	6 December 2021	 
<a href="#">Project Summary</a>	11 August 2016	24 February 2022	 

Showing 1 to 2 of 2 entries