



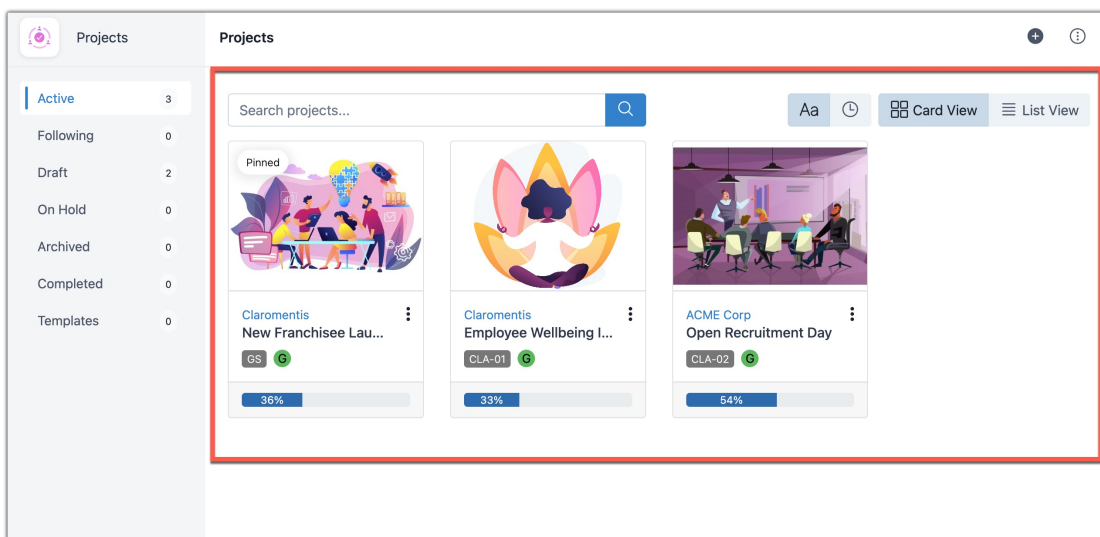
Projects: Front-End

This guide will detail all the options and actions that can be performed by users on the front end of Projects

List of projects

The centre of the Project application is where any Projects the user has permissions to view or interact with will be listed.

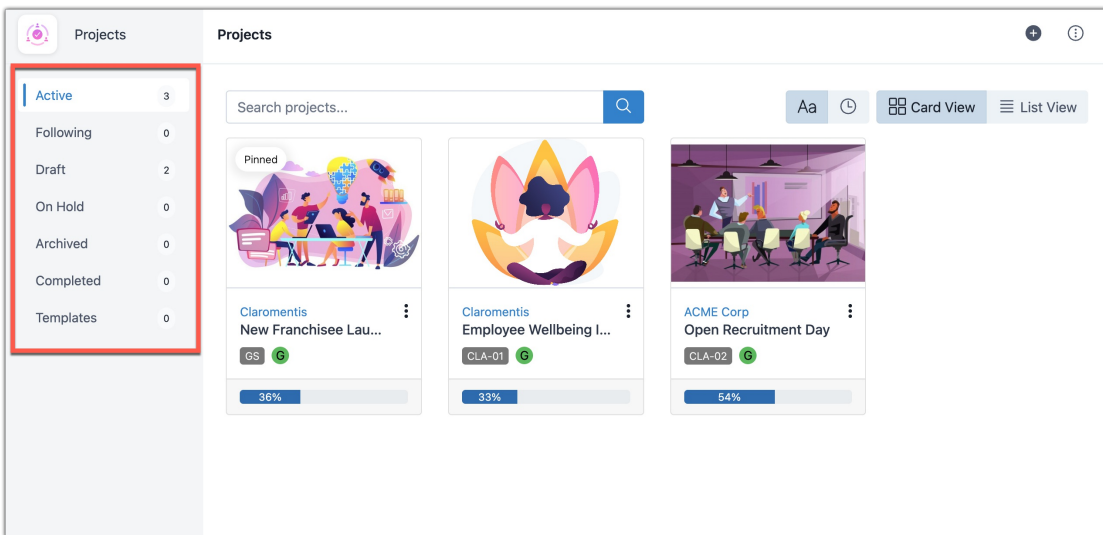
They can click into these to open them and perform actions.



- **A search bar** is available at the top to allow particular ones to be found if there are hundreds of Projects listed
- **Sorting Options:** 'Aa' will sort Projects by name, and the clock icon will sort by date of creation (changing this only changes the user's view, not everyone's)
- **View options:** The same here, the user can choose between the card or list view for the Projects to match their preference

Project Statuses

On the left are the different categories a Project can be in.



A user will need appropriate permissions within projects or the application overall to be able to see projects listed here.

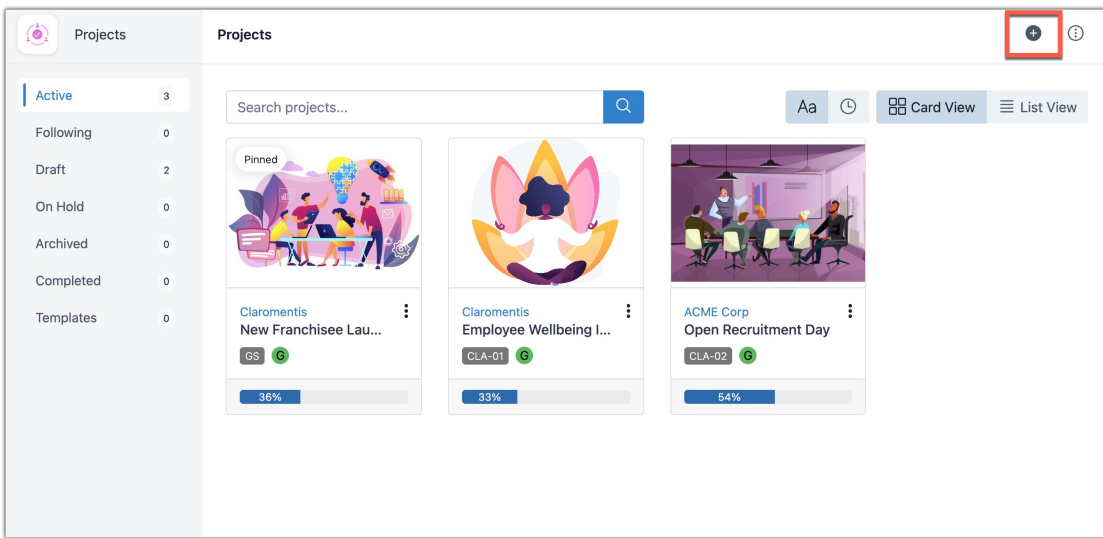
- **Active:** Projects currently open and in 'live' status
- **Following:** Projects a user has clicked the Follow button for
- **Draft:** Projects any user with rights has put into draft status and not made live
- **On Hold, Archived, Completed:** Labels available to give projects when appropriate
- **Templates:** These can be created by those with 'create project' rights. New projects can use a template to start from, speeding up the task creation process.

The Project status is set at creation and at any point after when it is edited.

Over time, project members will change the status to be in line with the project's current state:

Create a new project

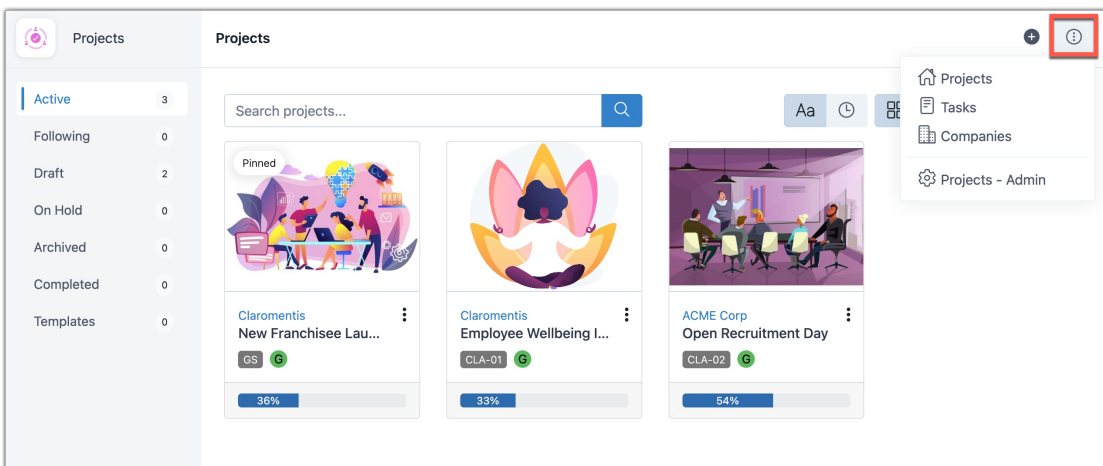
Users who have been given this permission by administrators on the admin side will see the cross icon:



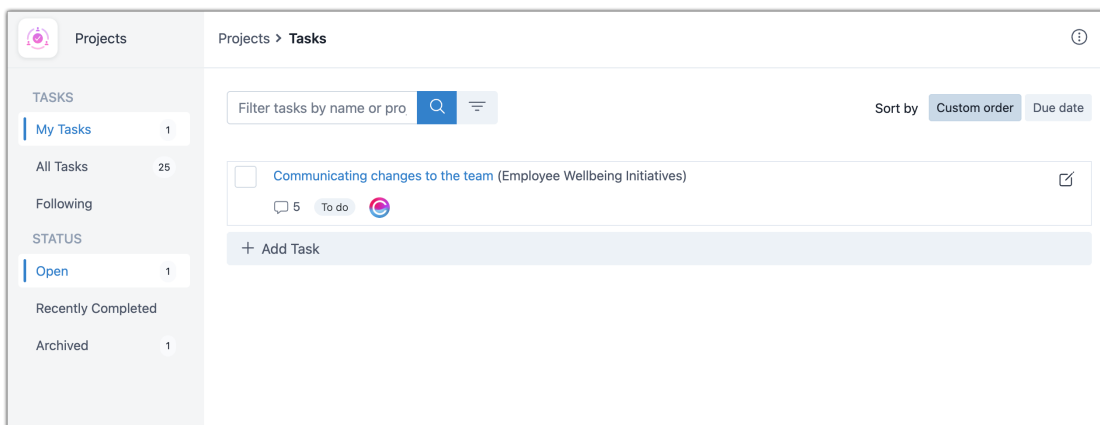
This means they can create a new project, edit its configuration, add themselves to permissions for it and save it as detailed in our guide [here](#).

3 dot menu



Clicking the 3-dot menu icon will open more options:



- **Projects:** Acts as a 'home' button and will take the user back to the landing page of Projects
- **Tasks:** Lists all tasks across Projects that are active or assigned to the user:



- **Companies:** Users with permission to create companies can add new records. These can then be chosen when creating a new project to attribute it to a particular company.

Companies		
		+ New Company
Company	Contact Name	
 ACME Corp	Bob Smith	
 Claromentis	Michael Christian	

- **Project admin:** Will only appear to application administrators of Projects (and not normal users), allowing them to open the admin side of the application.

Created on 13 March 2026 by [Hannah Door](#)

Tags: [projects](#)