Link to article: https://discover.claromentis.com/knowledgebase/articles/864

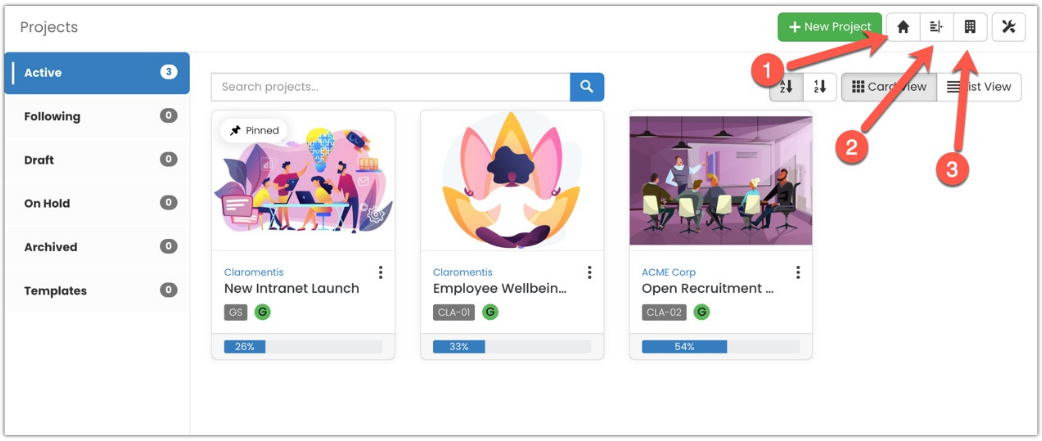
Projects v2.1+

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.

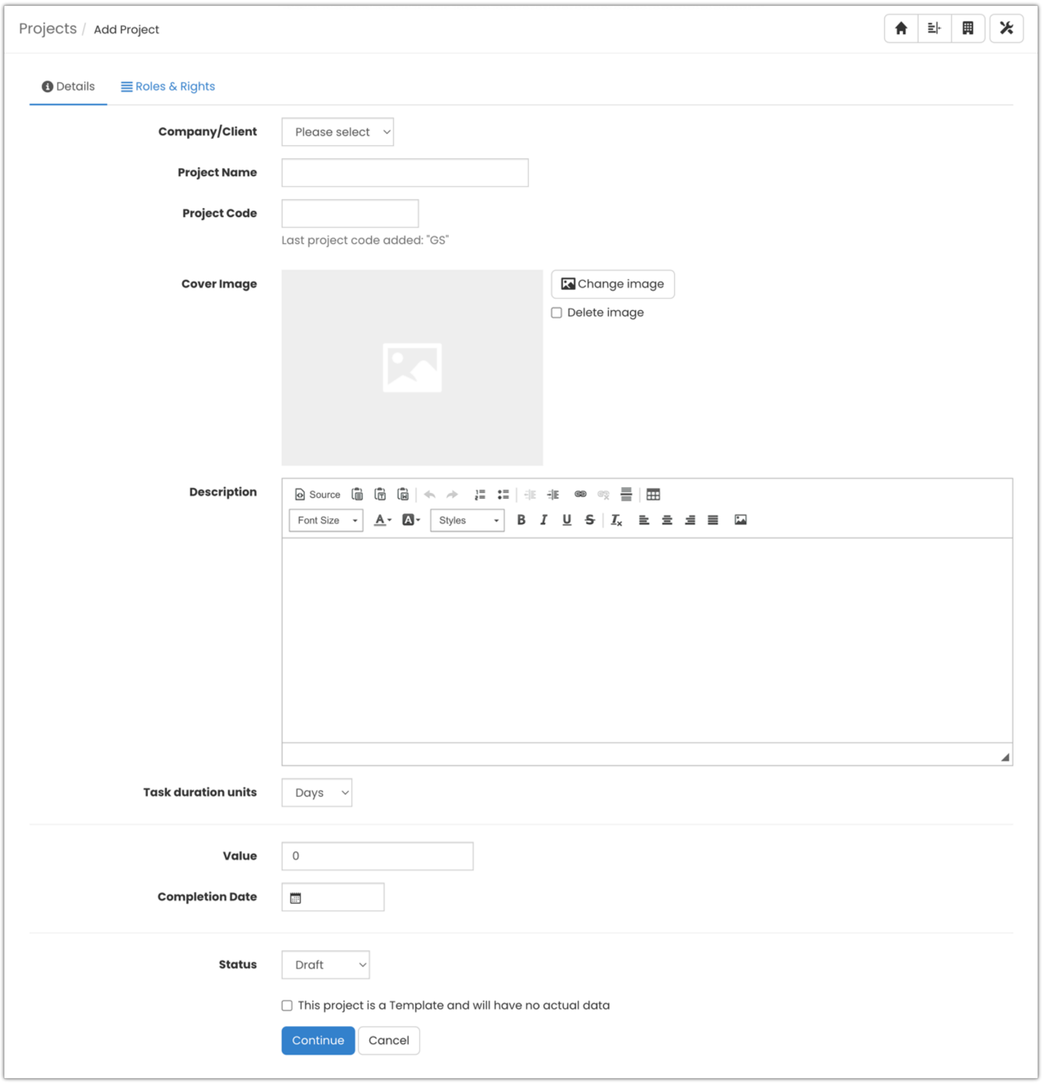
(3) **Companies**: You can view a list of existing company names. (This function is optional and may only be relevant depending on the type of project e.g. project on behalf of another company).

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.

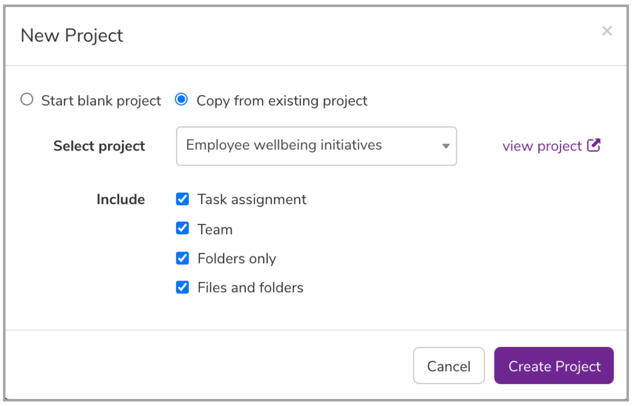


These options can be used/interpreted depending on the specific needs of your project:

- **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.

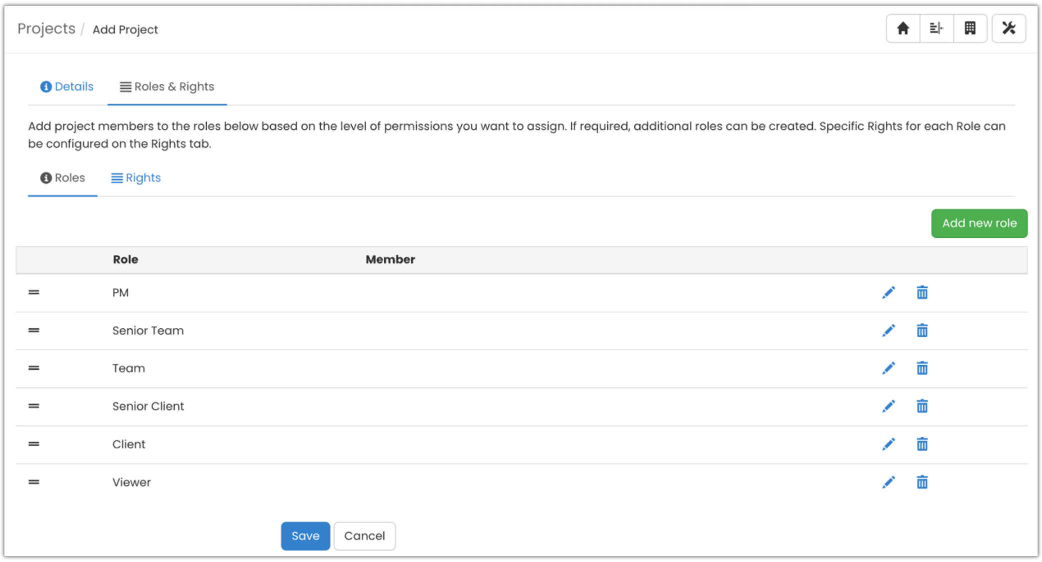


This option is useful if you would like your project to share certain characteristics as it allows you to specify what components you would like to copy.

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

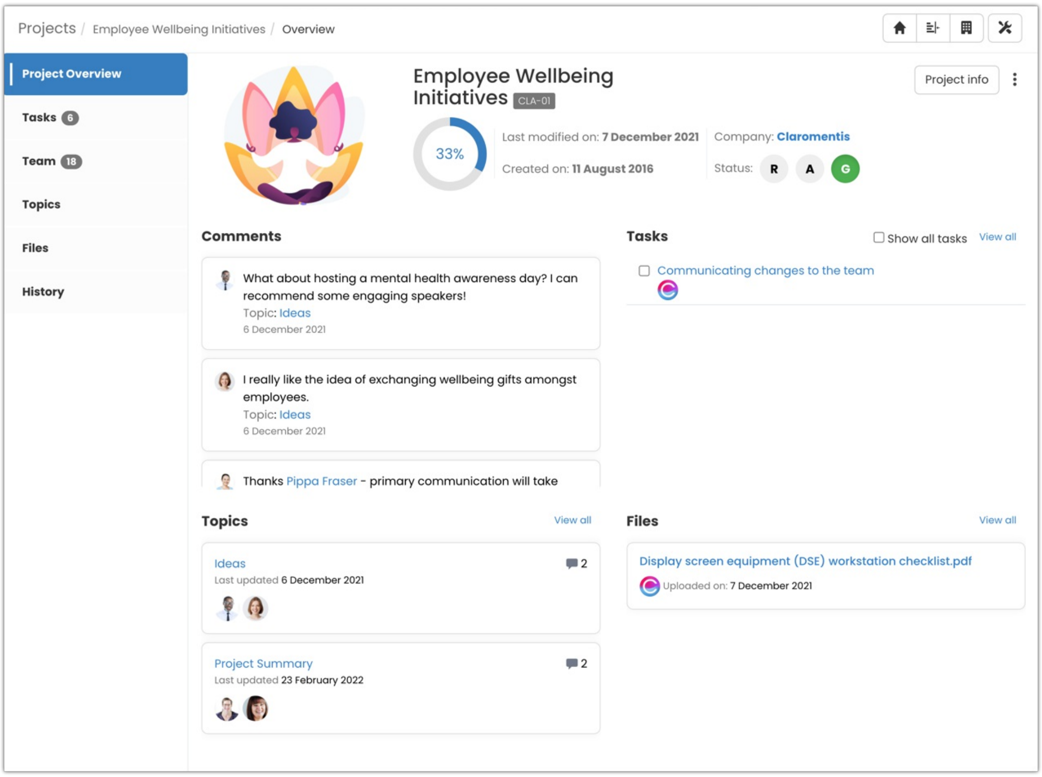


Project Overview

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.



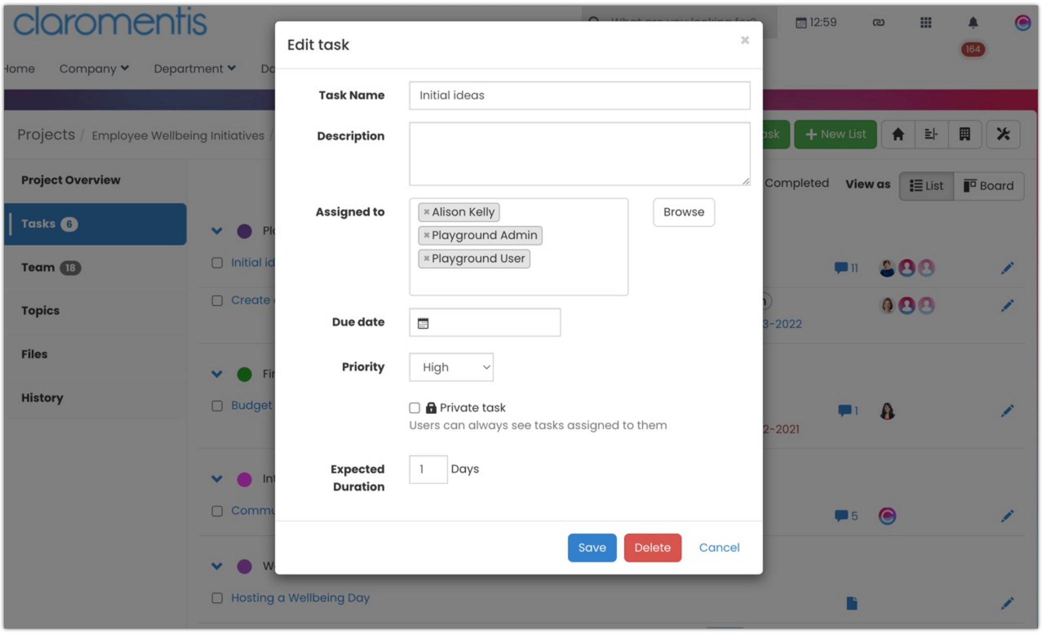
Please note: Project Role permissions will determine whether you have the option to edit the status and priority level, as well as add a project update.

All members of a project will see the following:

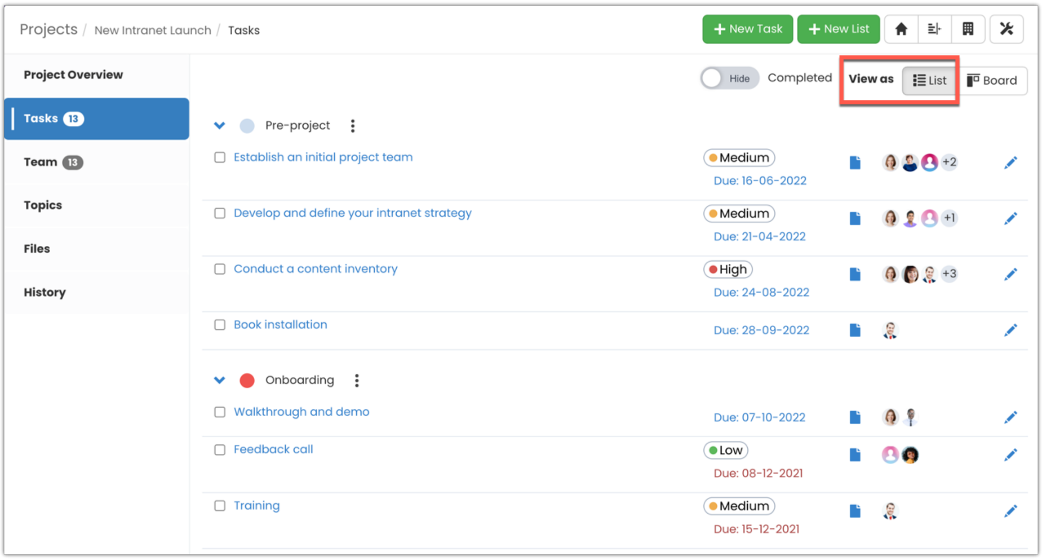
- Tasks: A detailed list of tasks within the project.
- Team: A list containing information on current project team members (e.g. Name, Project Role, Responsibility, Contact Details). Those with permissions are able to add/delete team members as needed.
- Topics: A discussion panel you can use to communicate 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

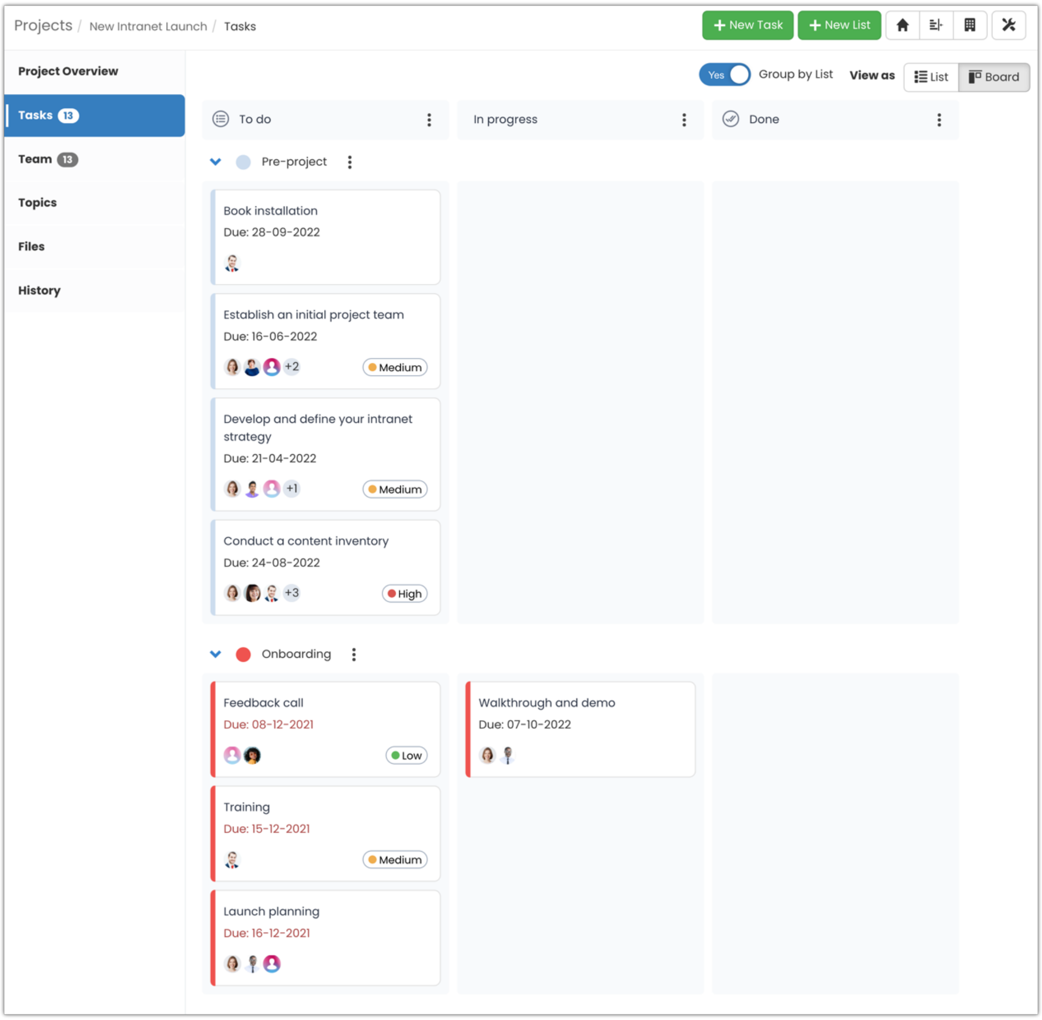
Tasks can be assigned to an individual or multiple users as required.



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

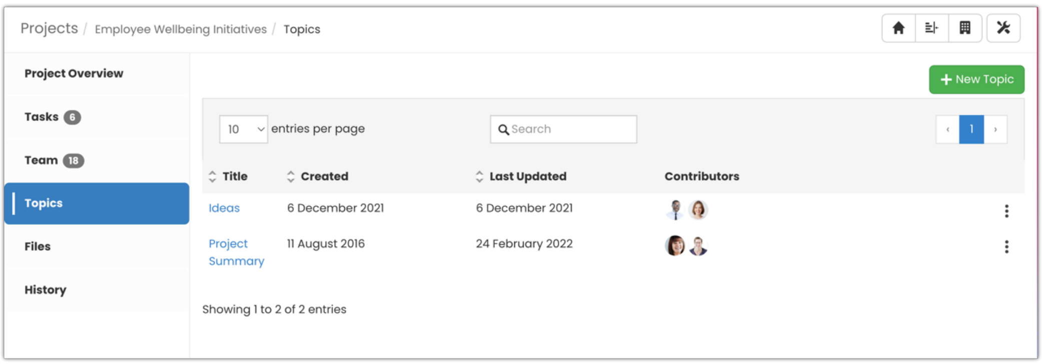


...or in Kanban board style.



Topics

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



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Tags: projects