



Project use over time

Once a Project has been created and its elements have been set up by its creator, users (team members) are ready to interact with it.

This guide will cover the various interactions users can have with a project.

Generally, users are assigned to tasks, and these are marked as complete to further the project's progress until all have been checked off and the project is closed.

There are spaces within a Project for discussion and file sharing, which are also detailed in this guide.

Project Overview tab

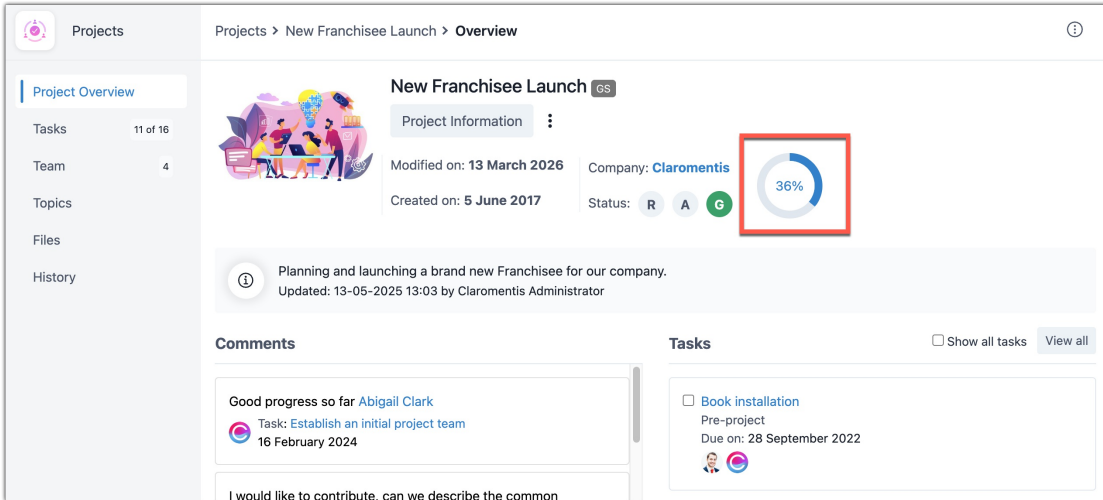
The landing page gives a summary of progress and the latest updates within a Project.

A screenshot of the Project Overview tab in the Claromentis system. The page title is "New Franchisee Launch" with a 36% progress indicator. The project information includes: Modified on: 13 March 2026, Company: Claromentis, Created on: 5 June 2017, and Status: R A G. The main content area is divided into four sections: Comments, Tasks, Topics, and Files. The Comments section shows a comment by Abigail Clark on 16 February 2024 about establishing an initial project team, and another comment by a user on 6 December 2021 asking for common painpoints. The Topics section shows "Project Summary" (last updated 6 December 2021) and "Intranet Content Strategy" (last updated 7 December 2021). The Tasks section shows a task "Book installation" due on 28 September 2022. The Files section shows a PDF file "Business requirements gathering template.pdf" uploaded on 6 December 2021. A left sidebar contains navigation options: Project Overview, Tasks (11 of 16), Team (4), Topics, Files, and History.

- The first set of fields is those set up by the Project creator, e.g. project title, code, company, creation date and short description (if applied)
- Underneath this the latest comments are shown and can be browsed
- Tasks assigned to the user are listed
- The latest updates in Topics are listed
- The latest uploads are shown
- The tabs on the left lead to the specific areas the overview showcases where more information about each can be seen.

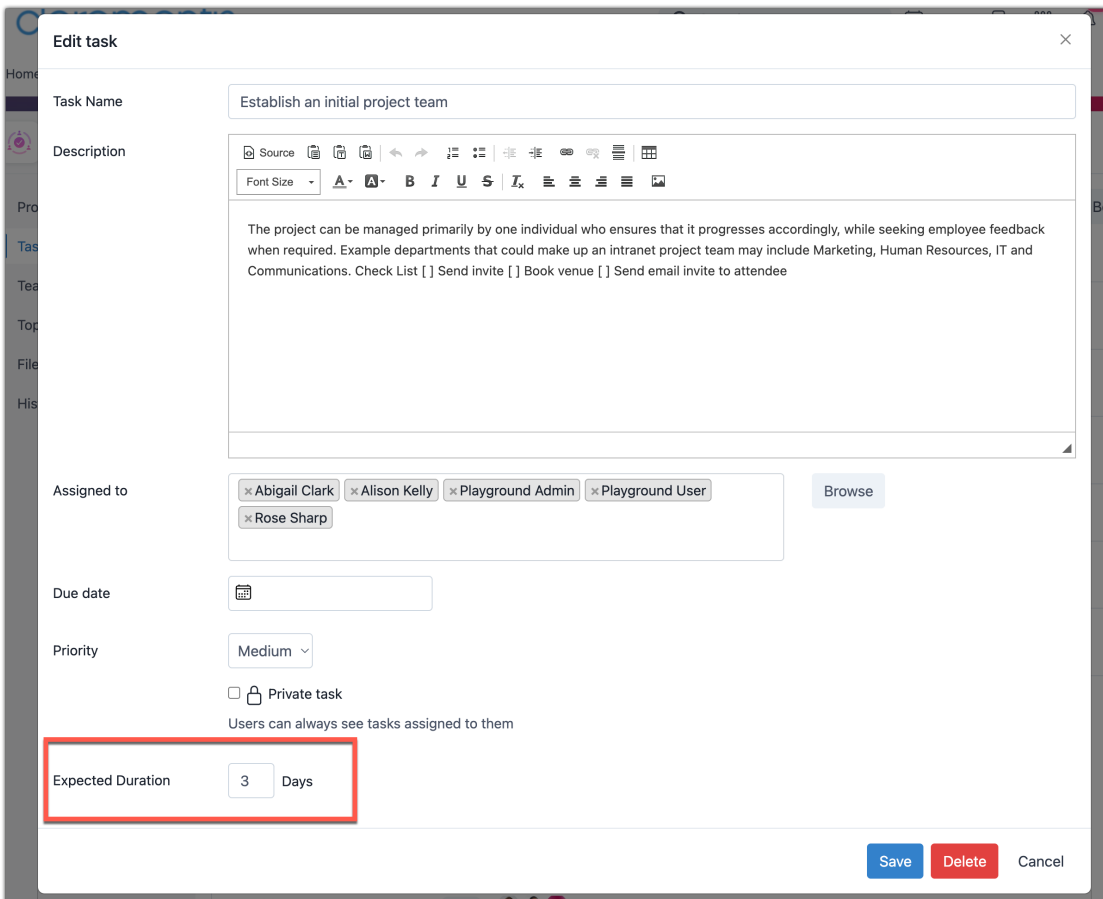
The Progress bar

Completion percentage is tied to the duration set per task.



Users who can create or edit tasks can set the duration.

(The type of duration, e.g. hours, days, custom can be changed when editing the project)



When a user marks a task as complete, the system uses the task duration to work out how much progress this counts as to update the percentage.

The values will be added to display the appropriate % based on how many tasks exist in the project.

e.g. if there are 10 tasks in the project and a task is given an expected duration of 1 day, this would count as 10% of the overall project progress.

Tasks

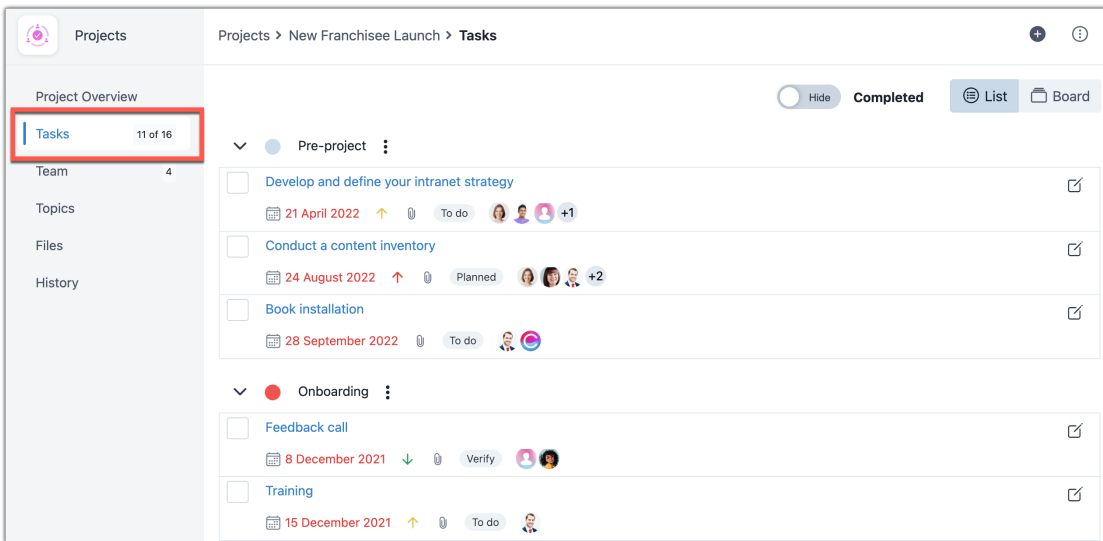
The core of any Project, the tasks will be assigned to users for them to complete and further its overall completion.

The permissions set up in Roles & Rights will determine which tasks a user can see.

Users will be notified if a task is assigned to them.

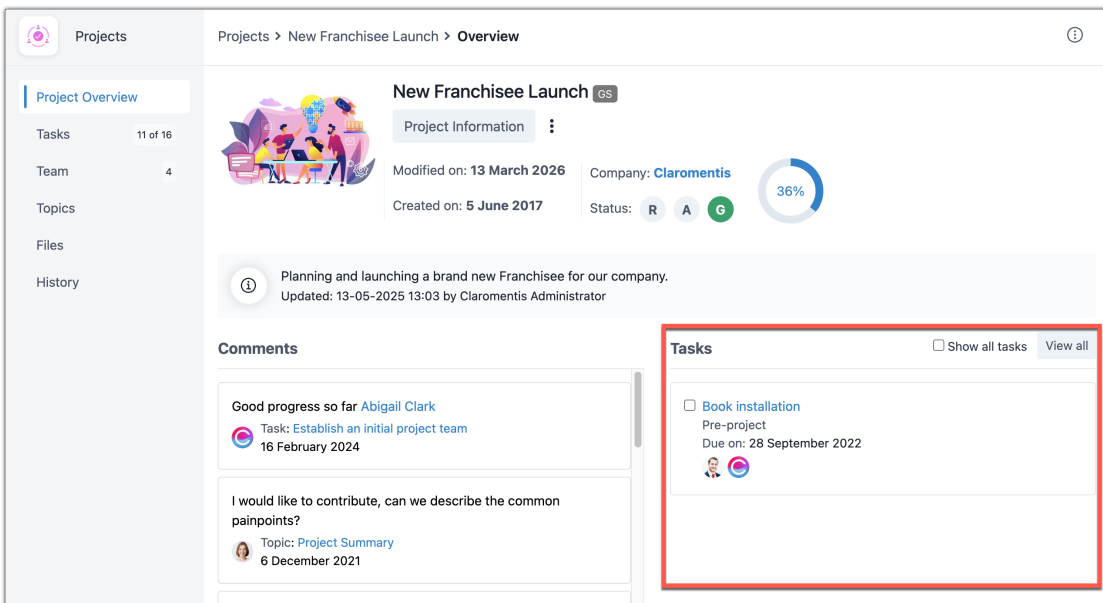
Users can browse tasks:

1. In the tab for them directly:



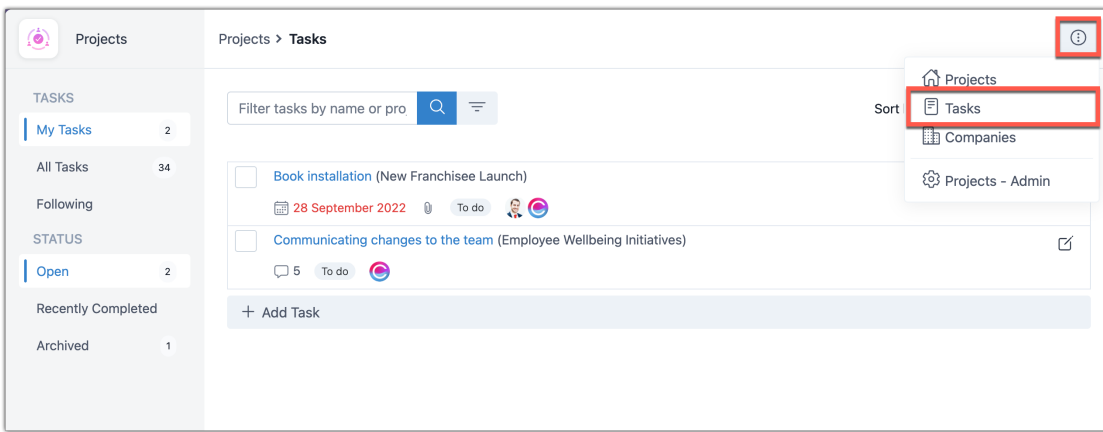
The screenshot shows the 'Tasks' view for a project named 'New Franchisee Launch'. The left sidebar has a 'Tasks' tab highlighted with a red box, showing '11 of 16' tasks. The main content area displays a list of tasks under two categories: 'Pre-project' and 'Onboarding'. Each task includes a checkbox, a title, a due date, a status, and assigned users. For example, 'Develop and define your intranet strategy' is due on 21 April 2022 and is in 'To do' status. 'Book installation' is due on 28 September 2022 and is also in 'To do' status. The 'Onboarding' section includes 'Feedback call' (due 8 December 2021) and 'Training' (due 15 December 2021).

2. In the section on the project overview tab:

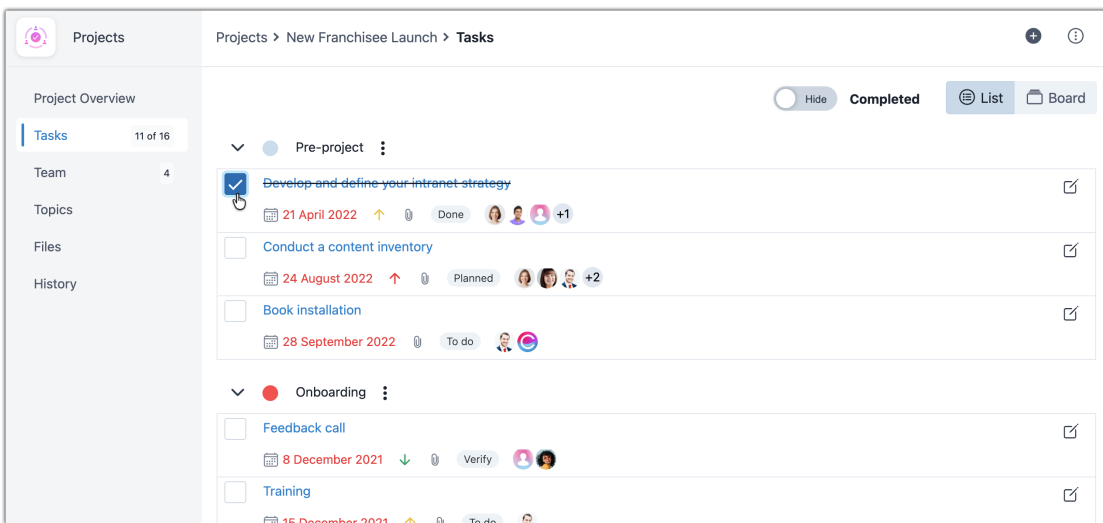


The screenshot shows the 'Overview' view for the 'New Franchisee Launch' project. The left sidebar has a 'Project Overview' tab highlighted with a red box. The main content area displays project information, including the company name 'Claramentis', a 36% progress indicator, and a status of 'R A G'. Below this, there is a 'Comments' section with two entries. The first comment is from Abigail Clark, dated 16 February 2024, regarding the task 'Establish an initial project team'. The second comment is from a user, dated 6 December 2021, asking for common painpoints. A 'Tasks' section is also visible, with a red box highlighting a task 'Book installation' (due 28 September 2022) under the 'Pre-project' category.

3. Under the 3-dot menu (shows tasks across all Projects a user is in)

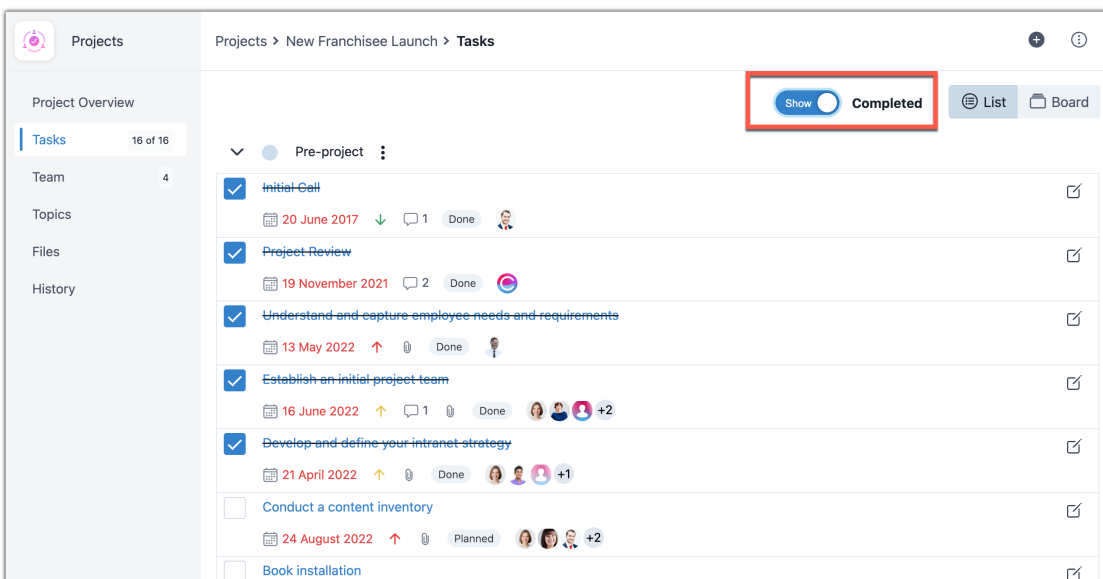


A user who can see a task can complete it by checking the box:



It will be removed from the list, but can be viewed by toggling the filter at the top of the screen.

Tasks can be marked as complete or reversed at any time by users with permission.



Clicking into a task, users can leave comments, including tagging other users, file uploads or links to materials:

Projects > New Franchisee Launch > Tasks > Project Review

Project Review

Meeting to arrange project review for planning and launching new intranet

Discussion 2 | Files | History

Users @mentioned in a comment will only receive a notification if they are a project member

Comments

Type your message...

Receipt acknowledgement

Abigail Clark wrote...
Before conducting intranet vendor research, you should have a strong understanding of employees' needs as this will act as an indispensable guide to selecting the right software. If your employees' needs are not being met with the functionality on offer, user adoption will inevitably be low.
Reply | Like | Edit | Delete | 06-12-2021 16:41

You wrote...
This is the second task to complete
Reply | Edit | Delete | 07-06-2017 09:48

To do

Project: New Franchisee Launch

Assigned to:

Created by:

Due on: 19 November 2021

Duration: 5 Days

Users have the choice to view tasks in the tab as a list, or a Kanban board based on their preference.

Moving tasks into the 'Done' column is the same as marking as complete.

Projects > New Franchisee Launch > Tasks

Group by List | List | Board

To do | Planned | In progress | Verify

Pre-project

- Project Review
Due: 19 November 2021
- Conduct a content inventory
Due: 24 August 2022
+2 | High
- Book installation
Due: 28 September 2022

Onboarding

- Training
Due: 15 December 2021
Medium
- Launch planning
Due: 16 December 2021
- Feedback
Due: 8

Launch

- Soft launch to limited users

Team

Users added to the project can see who else is involved and their Role.

Some contact information will also pull through from People.

Users with permission can add more team members if necessary at any time.

Projects > New Franchisee Launch > Team

+ Add Team Member

Name	Project Role	Responsibility	Phone	Mobile	Email
Claromentis Administrator	PM	Project creator	+44 0800 409 6101		noreply@claromentis.com
Connor Chapman	PM	Team	+44 (0)1273 666355		admin.user@claromentis.com
Playground Admin	Team				support@claromentis.com
Playground User	Team				support@claromentis.com

Topics

These are discussions that those with appropriate permissions can create and manage.

Users can contribute to the topics to allow conversation about the project's critical subjects.

They can access these from the Project Overview tab or directly in the 'Topics' tab.

Projects > New Franchisee Launch > Topics

+ New Topic

10 entries per page

Search

Title	Created on	Last Updated	Contributors
Intranet Content Strategy	6 December 2021	7 December 2021	
Project Summary	5 June 2017	6 December 2021	

Showing 1 to 2 of 2 entries

When in a Topic, users can leave comments using the blue send button.

It is possible to tag other users, upload files or provide links:

Projects > New Franchisee Launch > Topics > Intranet Content Strategy

Intranet Content Strategy

Useful intranet content that is relevant and well-organised helps employees locate what they are looking for and perform their tasks more effectively.

Comments

Type your message...

Receipt acknowledgement

Connor Chapman wrote...

There are many UX principles that can be used when working on our intranet content strategy.

Reply Like Edit Delete 06-12-2021 16:44

Last Updated
7 December 2021

Created on
6 December 2021

Created by
Connor Chapman

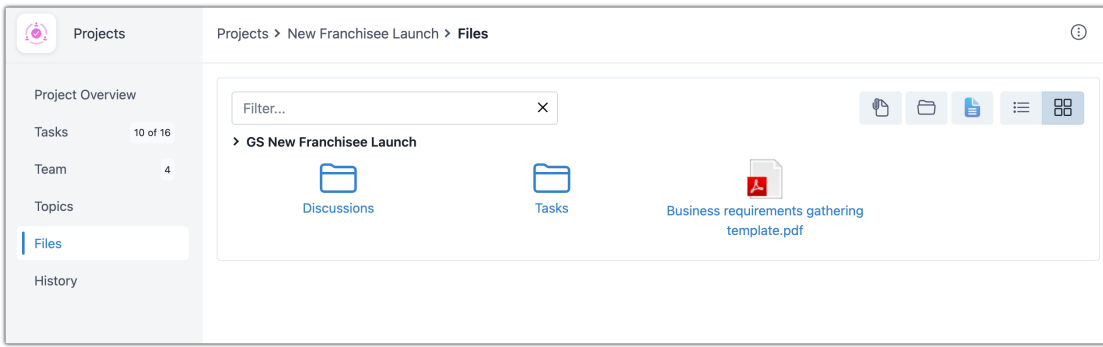
Comments
1

Files

Users with permissions can see this tab and upload any files necessary for the project to share with other members.

The folders created here are maintained in [the documents application](#).

Users can access the files from the Project Overview tab or directly in the 'Files' tab.



History

This tab keeps an audit log of all changes and updates in the Project for record-keeping

Area	Change	Date/Time	User
Task	Task marked as complete: "Develop and define your intranet strategy"	13-03-2026 14:28	Claromentis Administrator
Task	Task marked as incomplete: "Develop and define your intranet strategy"	13-03-2026 14:28	Claromentis Administrator
Task	Task marked as complete: "Develop and define your intranet strategy"	13-03-2026 14:28	Claromentis Administrator
Task	Task marked as incomplete: "Develop and define your intranet strategy"	13-03-2026 14:24	Claromentis Administrator
Task	Task marked as complete: "Establish an initial project team"	13-03-2026 14:21	Claromentis Administrator
Team	Member(s) removed from role: Viewer All registered	18-02-2026 09:24	Claromentis Administrator
Team	Member(s) removed from role: Team User: Blocked account User: Alison Kelly User: Amelia Jackson	18-02-2026 09:24	Claromentis Administrator

Notifications

Certain actions within projects will trigger a notification.

[Application administrators of Projects](#) can set what happens when these are triggered, whether users receive a notification about each action as it happens (the format of which will be sent in line with their [notification preferences](#)) or whether these accumulate into one daily digest-style email instead:

Admin Admin > Projects > **Communication**

Communication

Manage which messages are sent via system notifications and which are sent in a daily digest email

Added to team	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Team members added	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Member role changed	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Team member responsibility changed	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Project updated	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Project status changed	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Project file added	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Project deleted	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Task assigned to user	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Task added	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Task updated	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Task completion	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Task file added	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
Task deleted	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email
New topic added	<input checked="" type="radio"/> Notification <input type="radio"/> Daily digest email

Once your team have decided and applied this for each action, users will receive the correspondence across their projects in line with this when actions are performed.