Link to article: https://discover.claromentis.com/knowledgebase/articles/960/project-use-over-time

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.

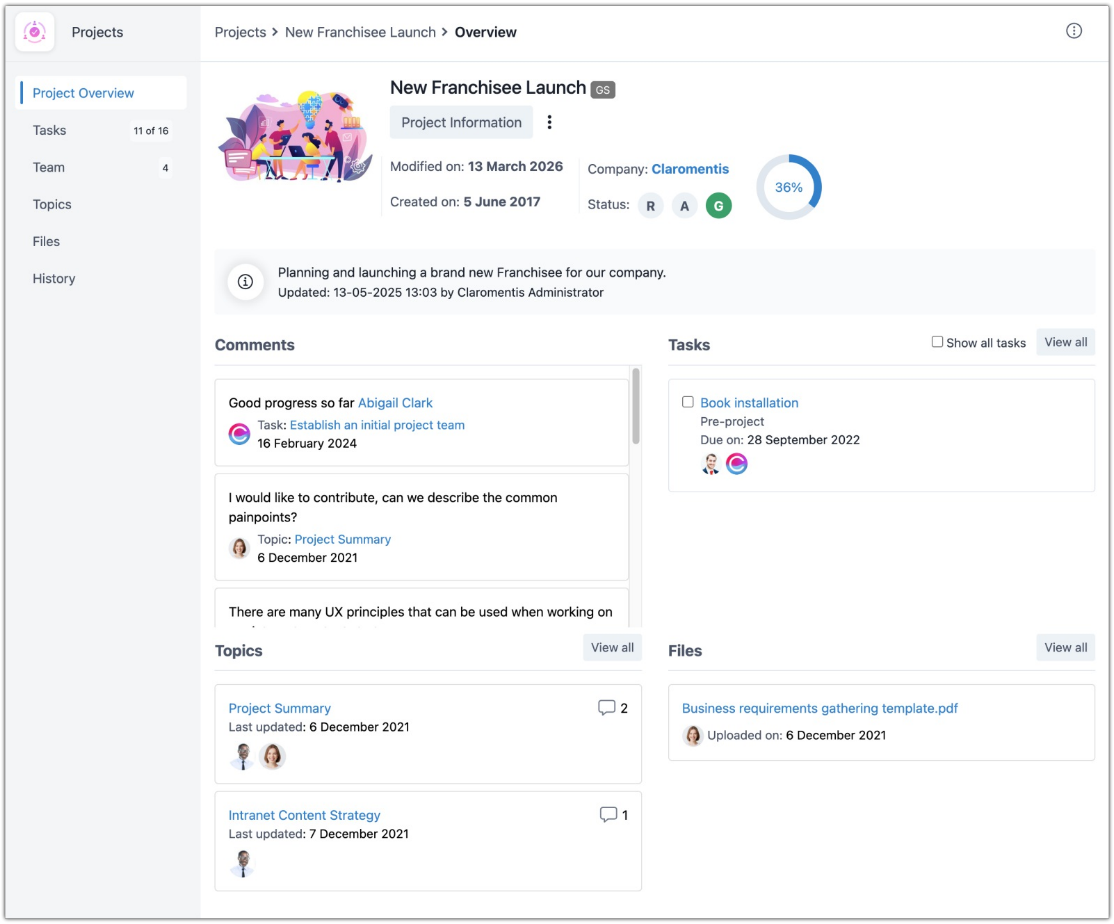
This guide will cover the various interactions users can have with a project.

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

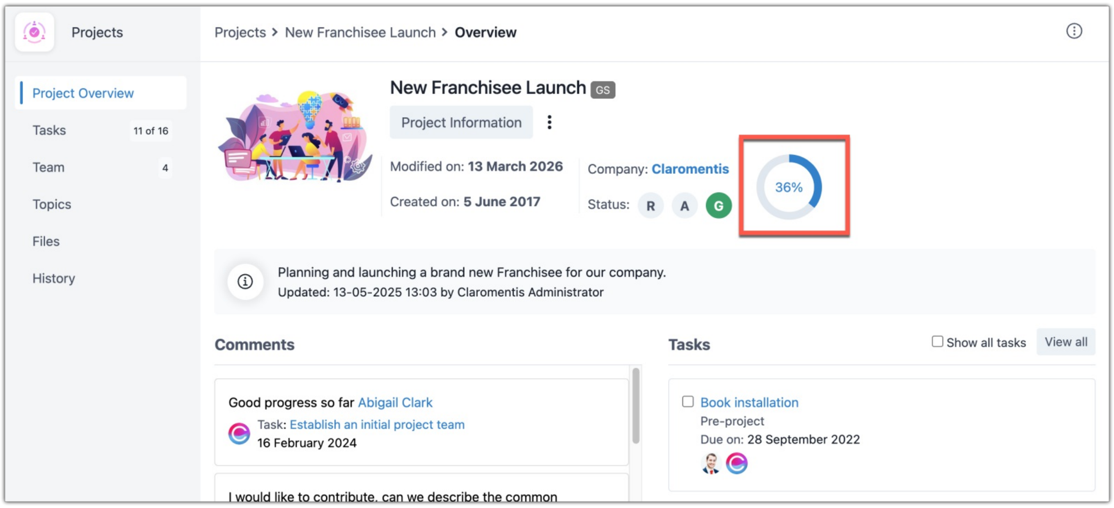
The landing page gives a summary of progress and the latest updates within a Project.



- 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.

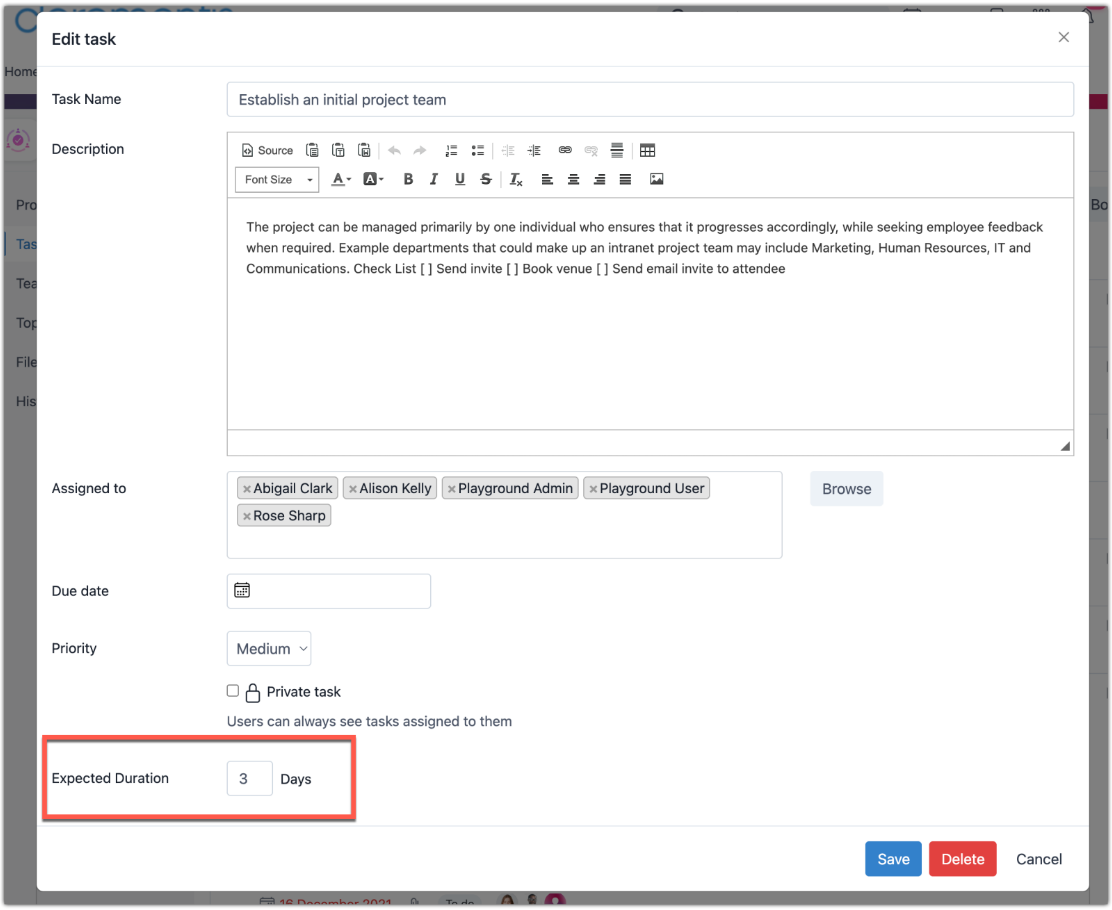
The Progress bar

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

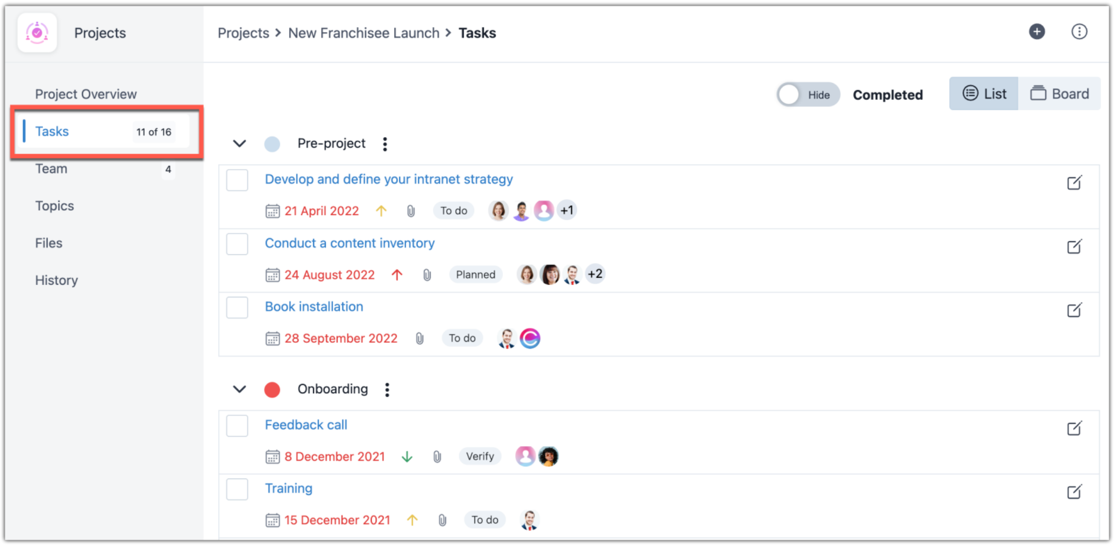
The core of any Project, the tasks will be assigned to users for them to complete and further its overall completion.

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

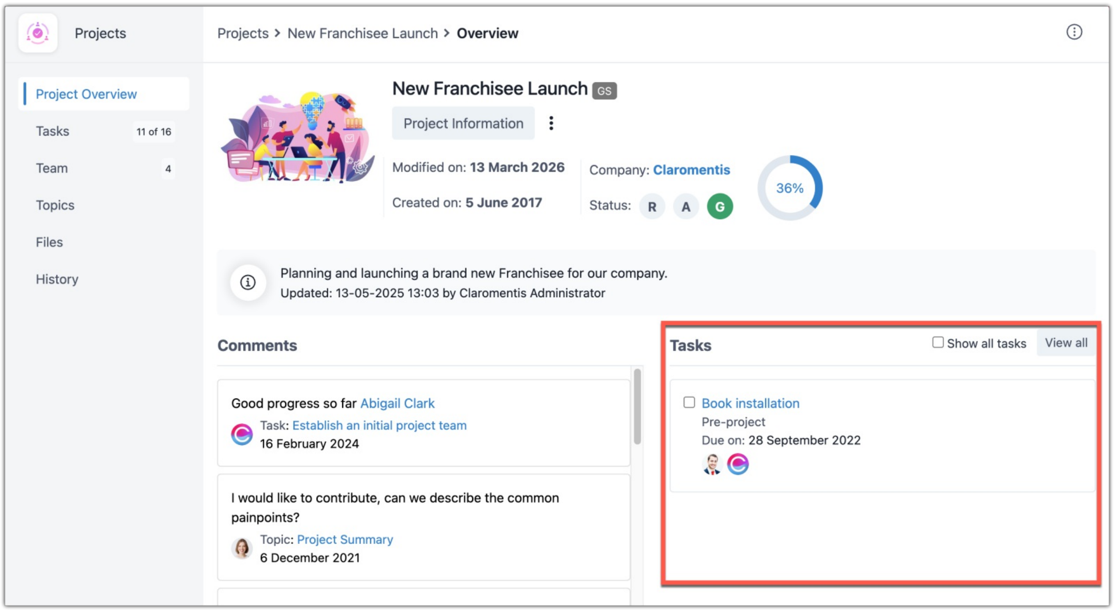
Users will be notified if a task is assigned to them.

Users can browse tasks:

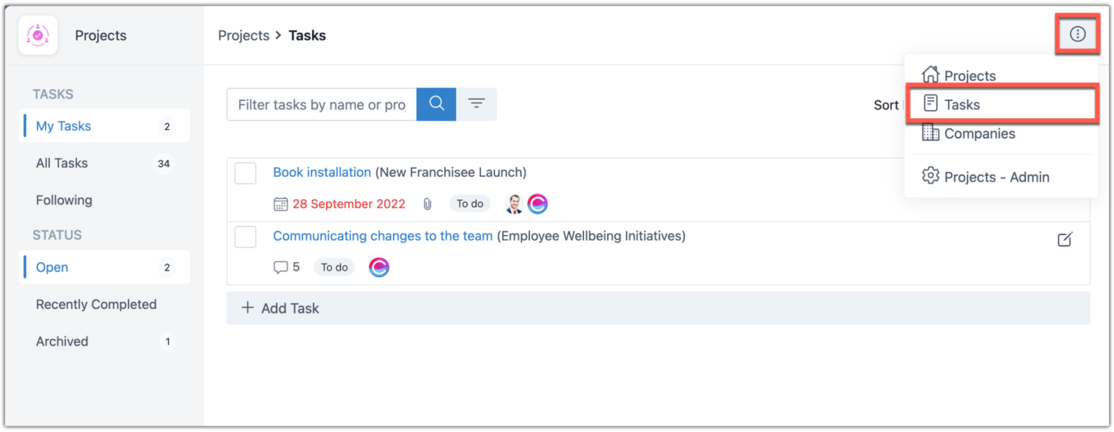
1. In the tab for them directly:



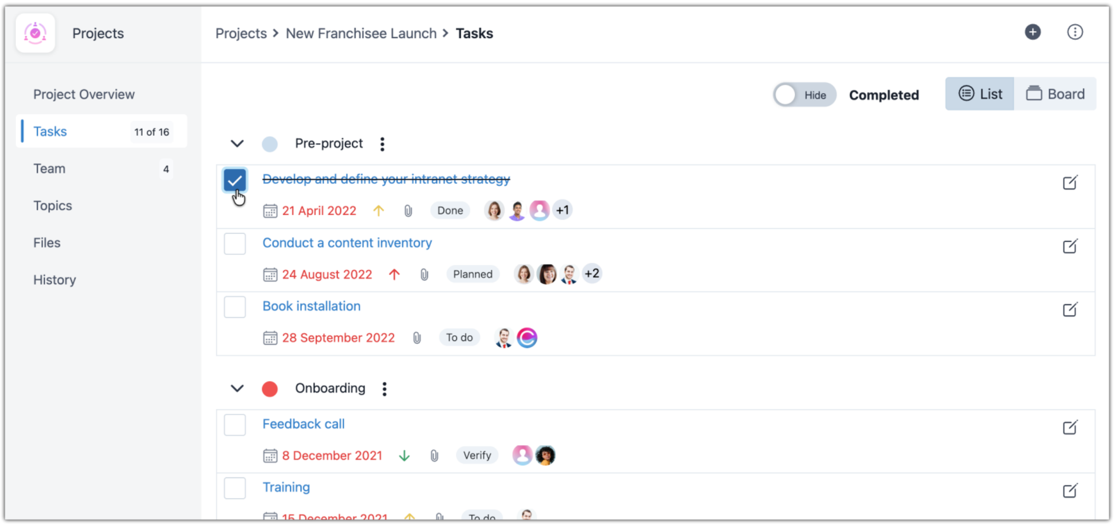
2. In the section on the project overview tab:



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

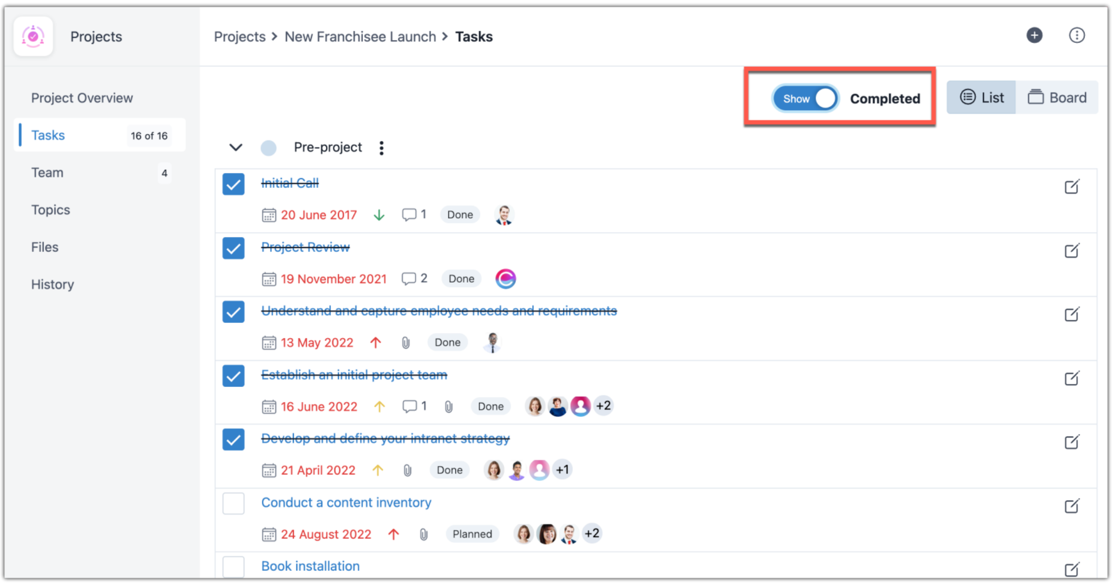


A user who can see a task can complete it by checking the box:

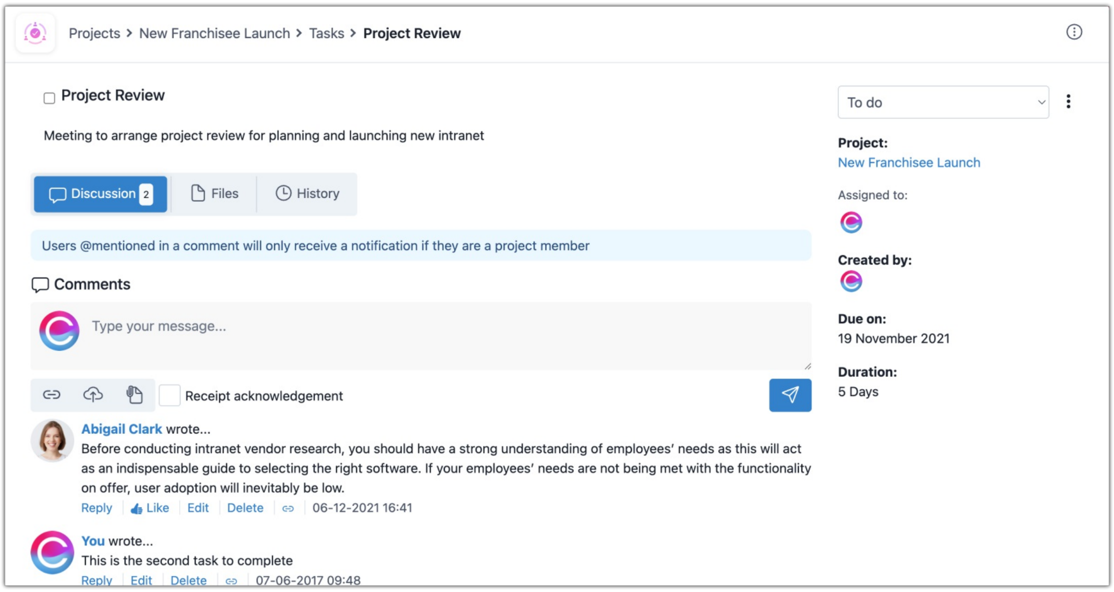


It will be removed from the list, but can be viewed by toggling the filter at the top of the screen.

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

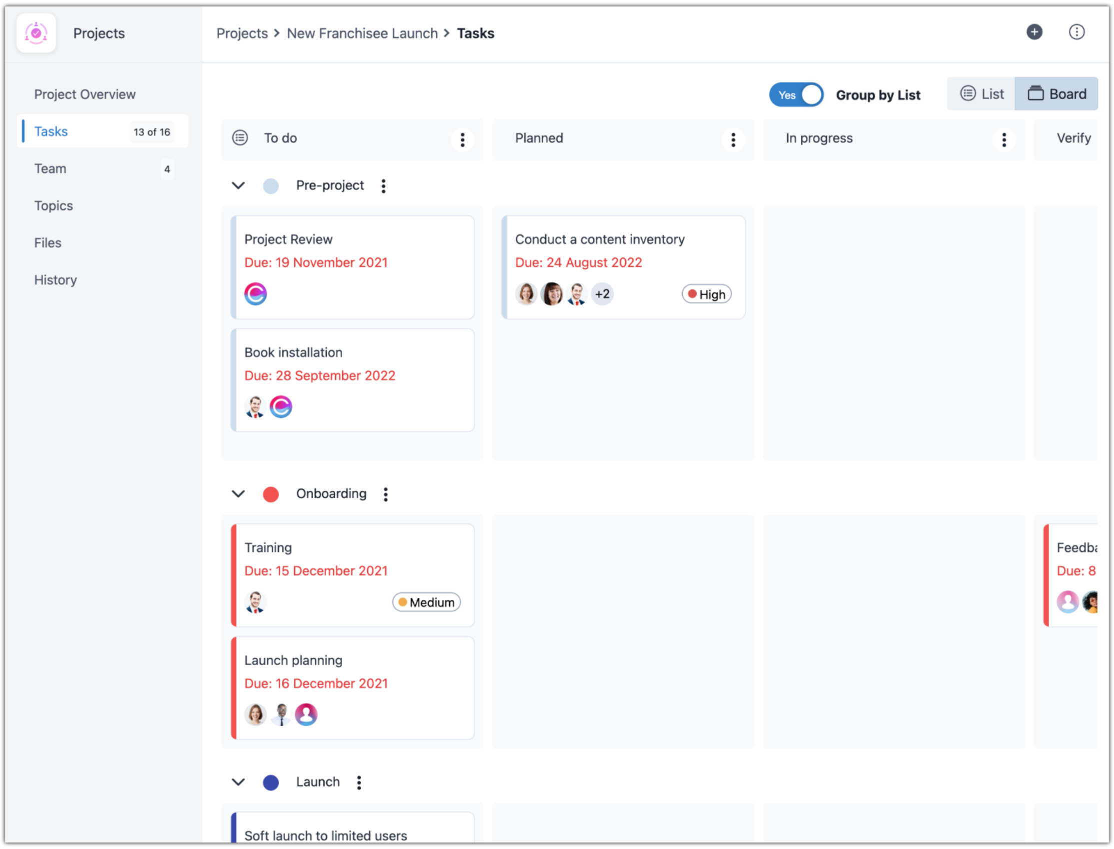


Clicking into a task, users can leave comments, including tagging other users, file uploads or links to materials:



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.

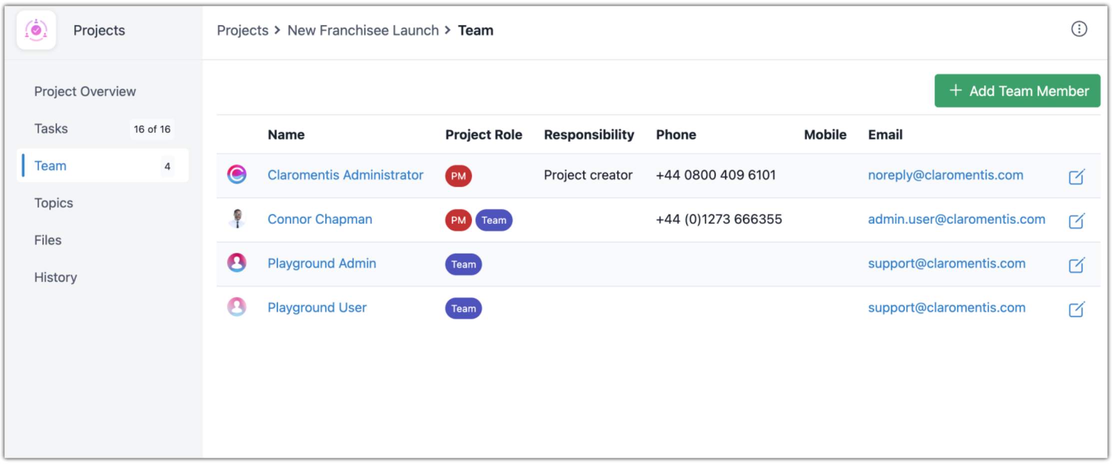


Team

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.

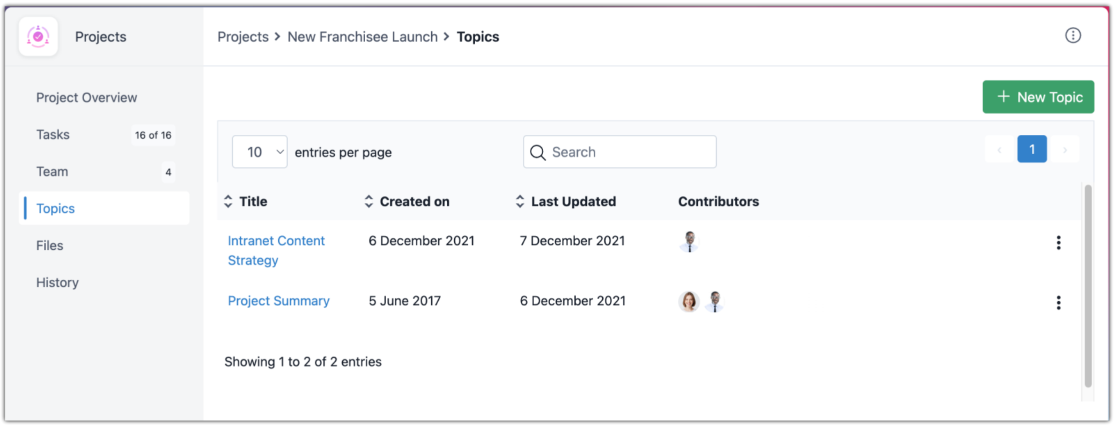


Topics

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

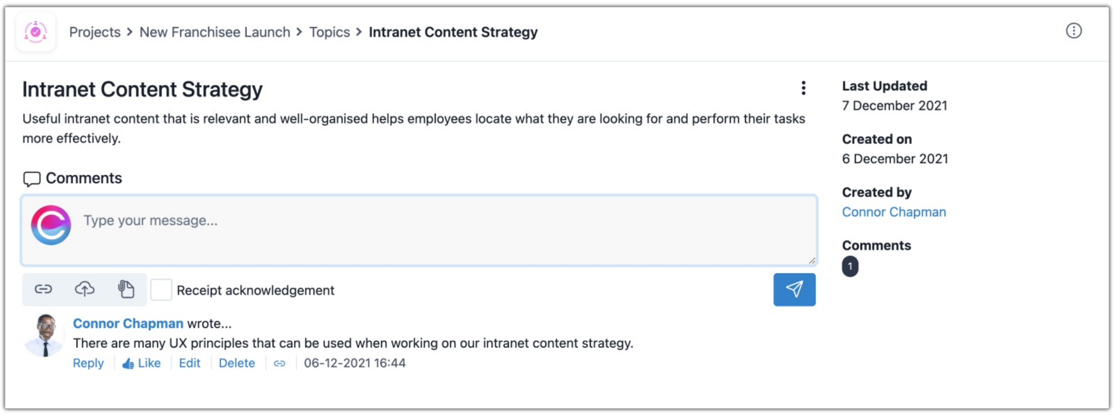
Users can contribute to the topics to allow conversation about the project's critical subjects.

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



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:

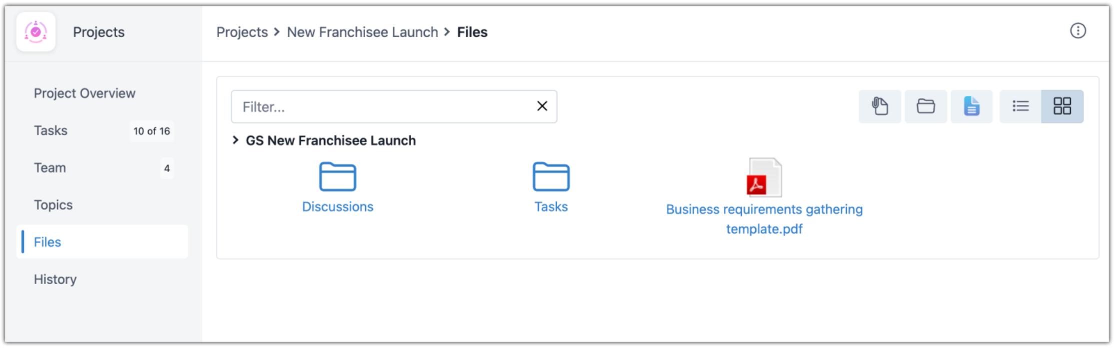


Files

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

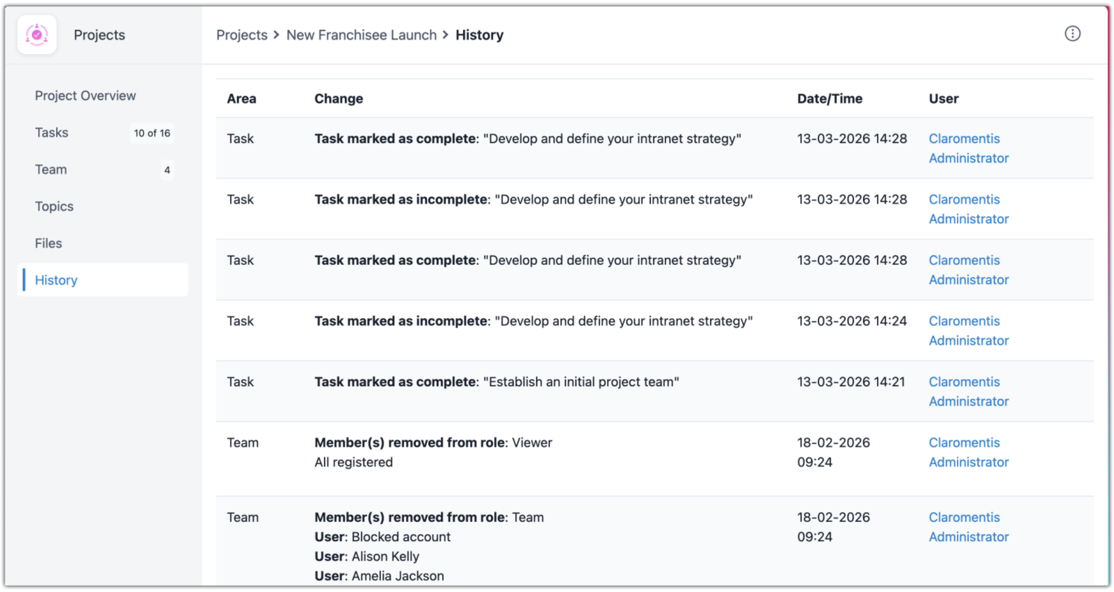
The folders created here are maintained in the documents application.

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



History

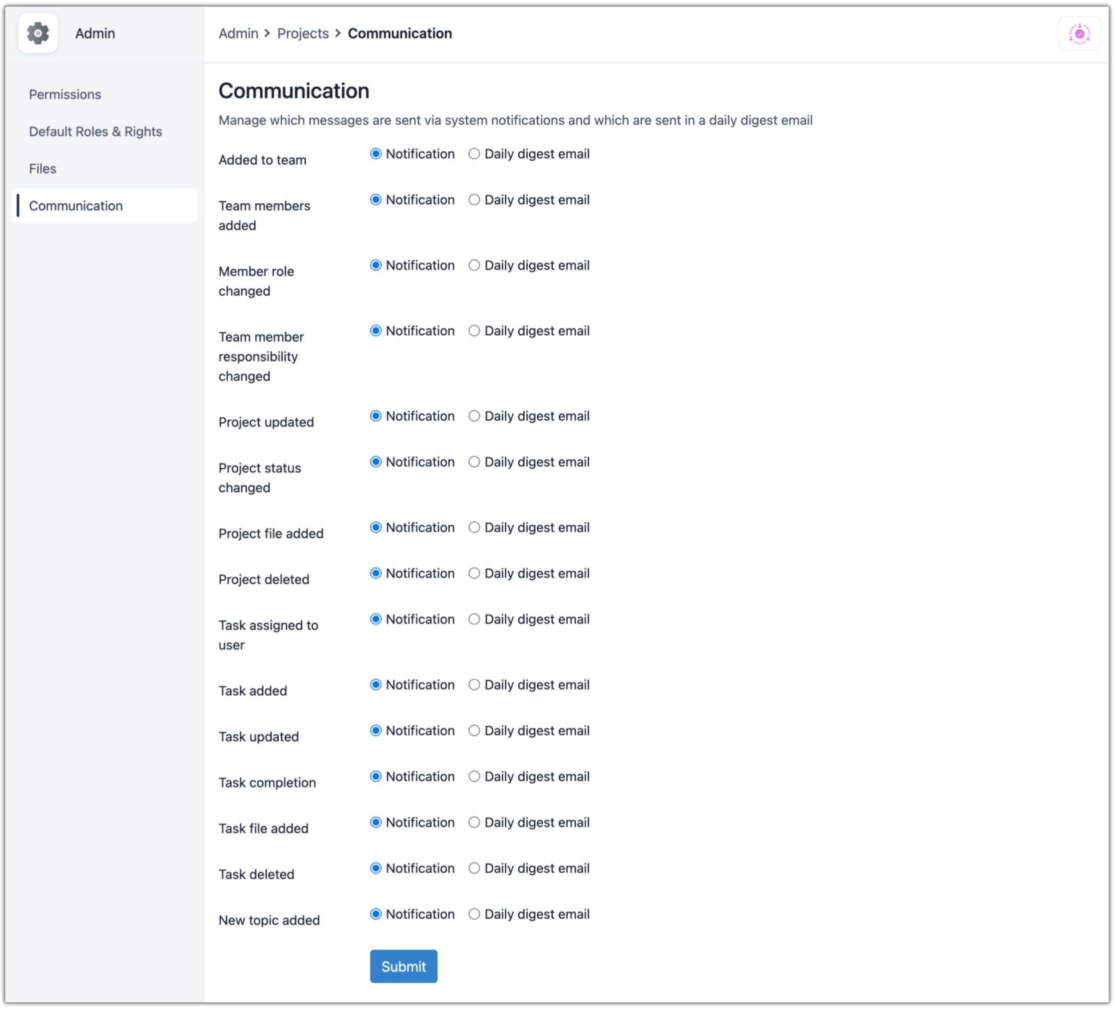
This tab keeps an audit log of all changes and updates in the Project for record-keeping



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:



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.

Created on 13 March 2026 by Hannah Door
Tags: progress, projects, user guide