



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 screenshot shows the 'Project Overview' tab for a project named 'New Franchisee Launch'. The page layout includes a sidebar on the left with navigation options: Project Overview (selected), Tasks (11 of 16), Team (4), Topics, Files, and History. The main content area is divided into several sections:

- Project Information:** Shows 'New Franchisee Launch' with a progress indicator at 36%. It also displays 'Modified on: 13 March 2026', 'Company: Claromentis', and 'Created on: 5 June 2017'. The status is indicated by three colored circles: R (red), A (orange), and G (green).
- Comments:** A list of comments is shown, including one from Abigail Clark dated 16 February 2024 and another from 6 December 2021.
- Tasks:** A list of tasks is shown, including 'Book installation' with a due date of 28 September 2022.
- Topics:** A list of topics is shown, including 'Project Summary' and 'Intranet Content Strategy'.
- Files:** A list of files is shown, including 'Business requirements gathering template.pdf'.

- 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.

The screenshot shows a project overview for 'New Franchisee Launch'. A circular progress bar indicates 36% completion. The project information includes: Modified on: 13 March 2026, Company: Claromentis, Created on: 5 June 2017, and Status: R A G. A comment from Abigail Clark dated 16 February 2024 mentions 'Establish an initial project team'. A task 'Book installation' is listed with a due date of 28 September 2022.

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)

The 'Edit task' dialog box shows the task 'Establish an initial project team'. The description includes a rich text editor with a toolbar and a paragraph of text. The 'Assigned to' field lists Abigail Clark, Alison Kelly, Playground Admin, Playground User, and Rose Sharp. The 'Due date' field is empty, and the 'Priority' is set to Medium. The 'Expected Duration' field is highlighted with a red box and is set to 3 Days. The dialog has 'Save', 'Delete', and 'Cancel' buttons at the bottom.

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

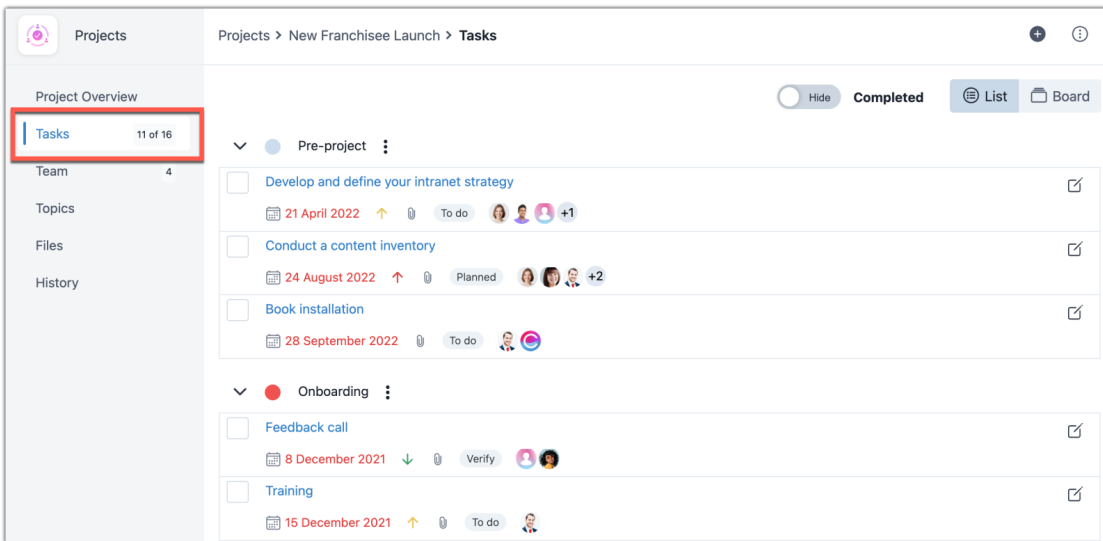
The core of any Project, the tasks will be assigned to users for them to complete and further its overall completion.

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.

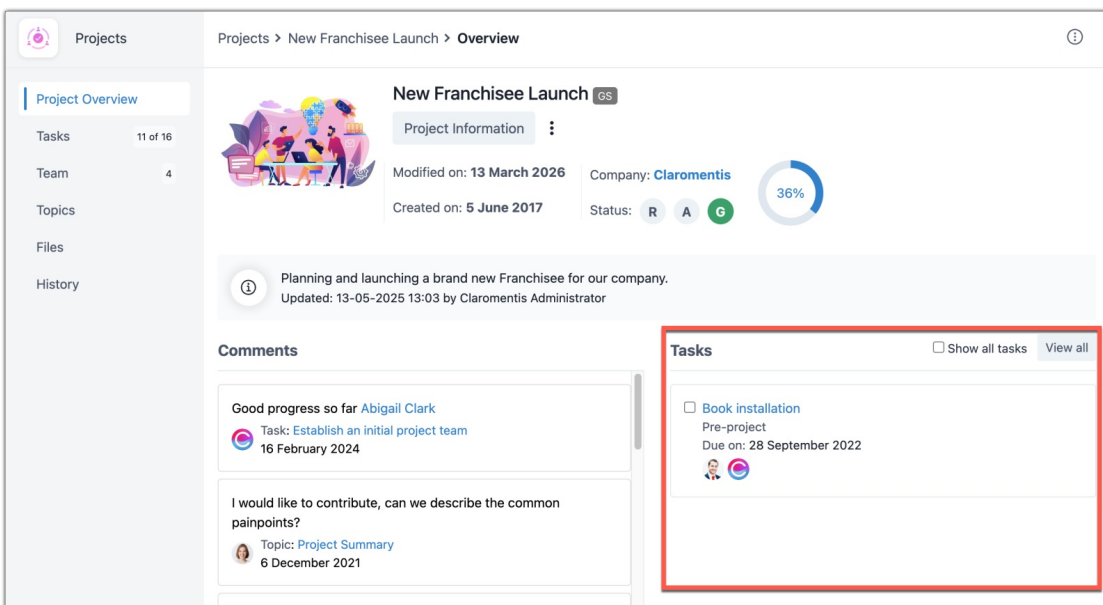
Users can browse tasks:

1. In the tab for them directly:



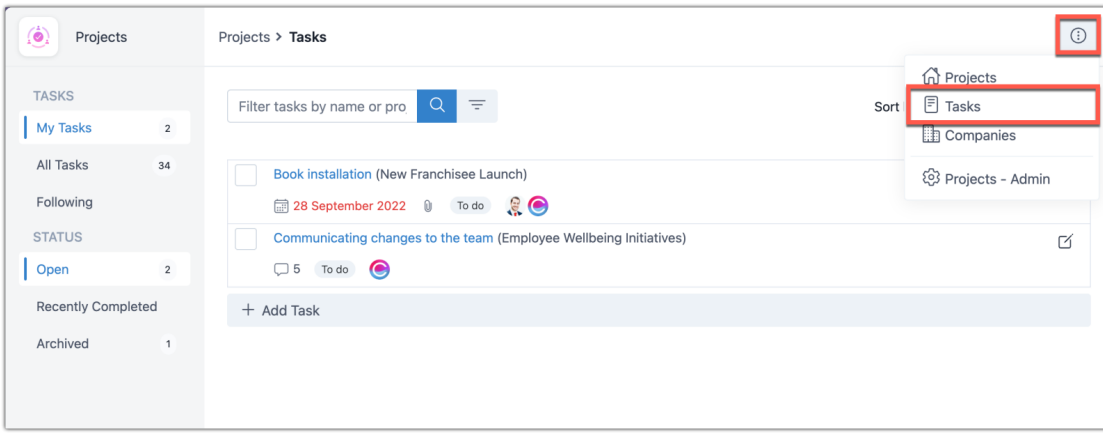
The screenshot shows the 'Tasks' view for a project named 'New Franchisee Launch'. The left sidebar has a 'Tasks' tab highlighted with a red box, showing '11 of 16' tasks. The main content area displays a list of tasks under two categories: 'Pre-project' and 'Onboarding'. Each task includes a checkbox, a title, a due date, a status (e.g., 'To do', 'Planned', 'Verify'), and assigned users. The 'Pre-project' tasks are: 'Develop and define your intranet strategy' (due 21 April 2022, To do, +1 user), 'Conduct a content inventory' (due 24 August 2022, Planned, +2 users), and 'Book installation' (due 28 September 2022, To do, 1 user). The 'Onboarding' tasks are: 'Feedback call' (due 8 December 2021, Verify, 2 users) and 'Training' (due 15 December 2021, To do, 1 user). At the top right, there are options to 'Hide Completed' and toggle between 'List' and 'Board' views.

2. In the section on the project overview tab:

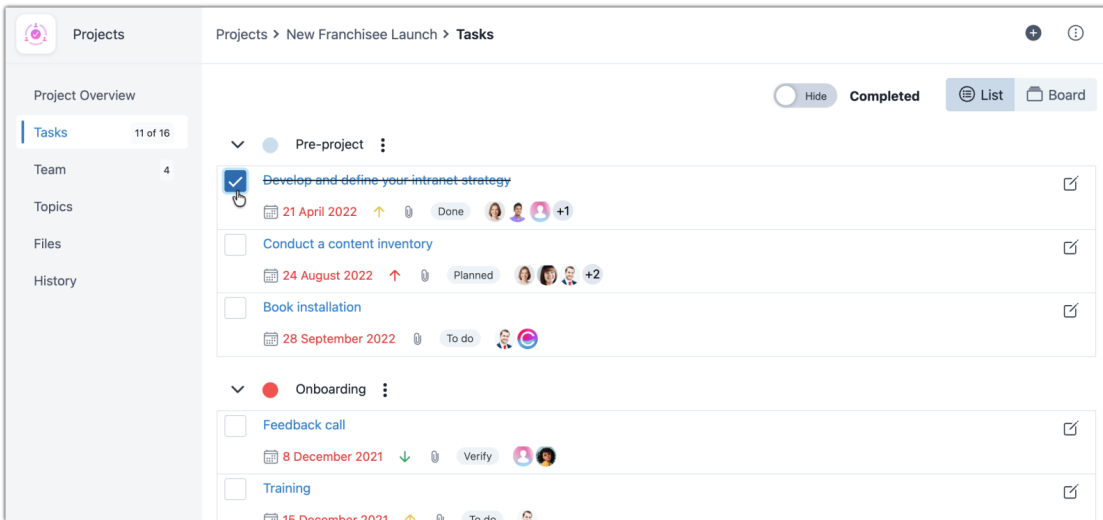


The screenshot shows the 'Overview' view for the 'New Franchisee Launch' project. The left sidebar has a 'Project Overview' tab highlighted with a red box. The main content area displays project information, including a progress indicator showing 36% completion. Below this, there is a 'Comments' section with two entries: 'Good progress so far Abigail Clark' (Task: Establish an initial project team, 16 February 2024) and 'I would like to contribute, can we describe the common painpoints?' (Topic: Project Summary, 6 December 2021). On the right, there is a 'Tasks' section with a red box around it, showing a list of tasks. The first task is 'Book installation' (Pre-project, Due on: 28 September 2022, 1 user). At the top right of the 'Tasks' section, there are options to 'Show all tasks' and 'View all'.

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

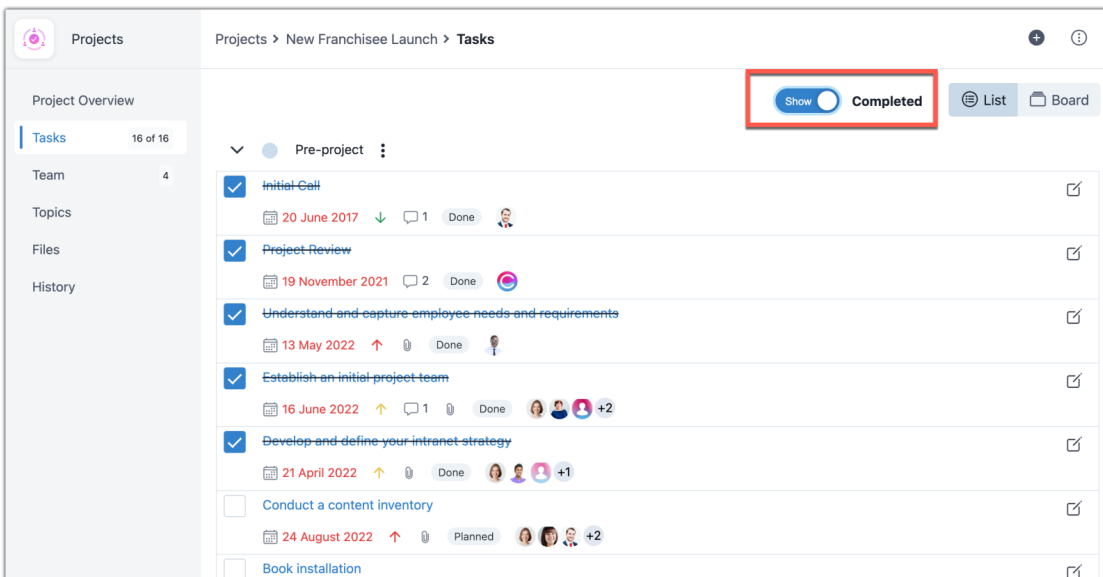


A user who can see a task can complete it by checking the box:

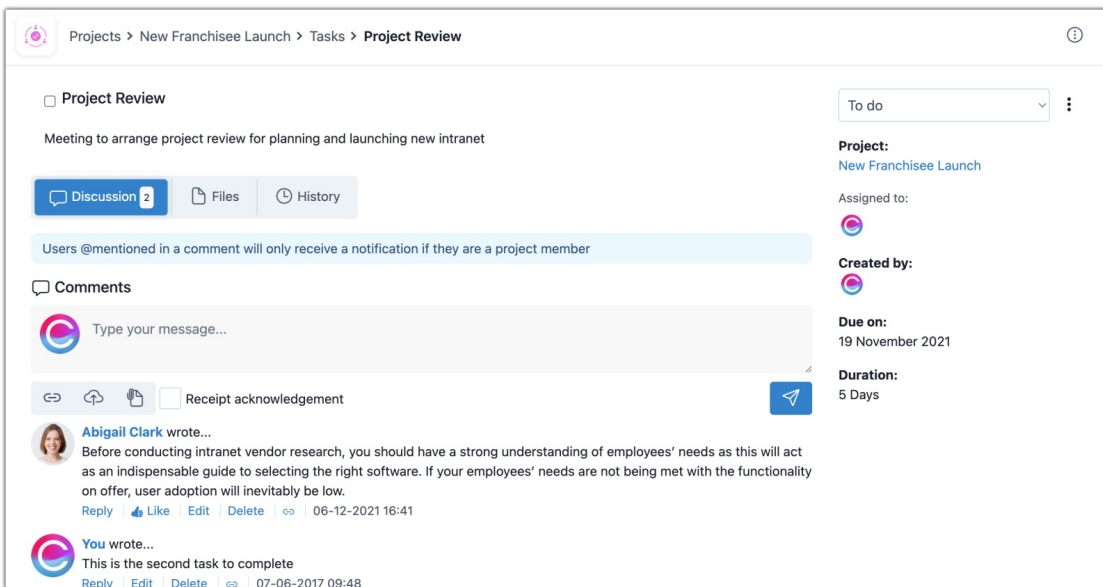


It will be removed from the list, but can be viewed by toggling the filter at the top of the screen.

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

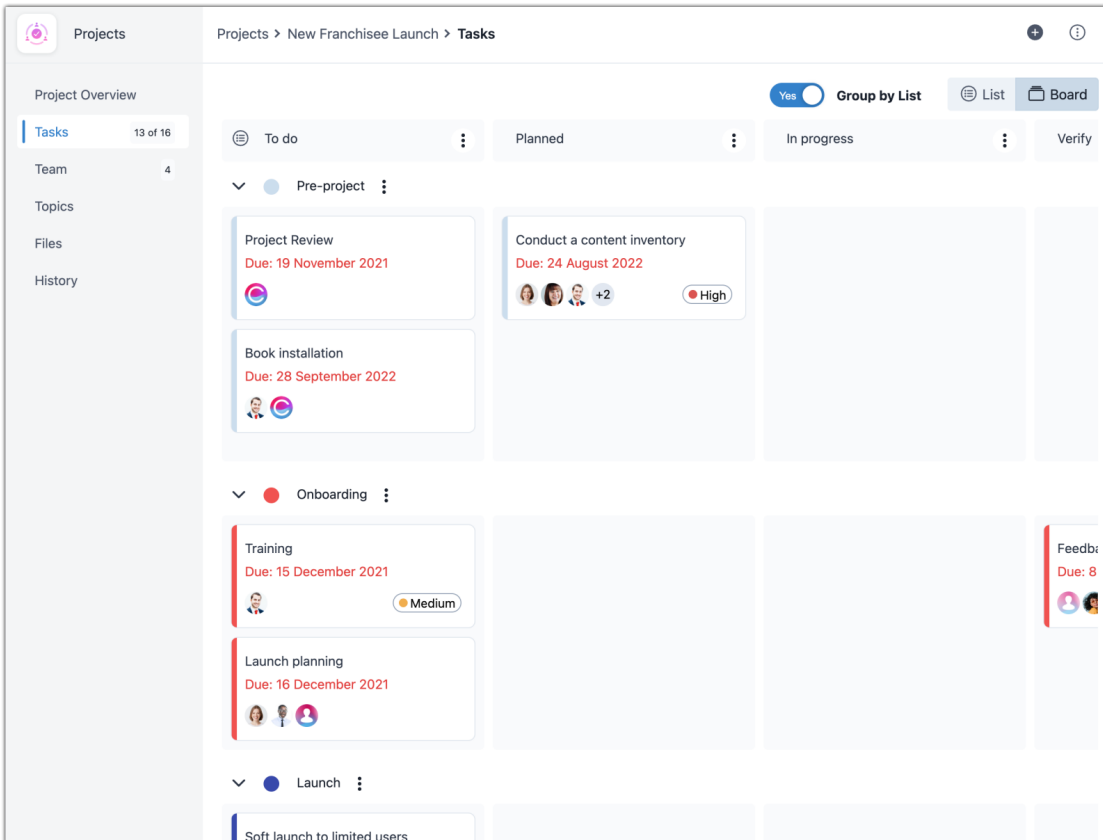


Clicking into a task, users can leave comments, including tagging other users, file uploads or links to materials:



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.

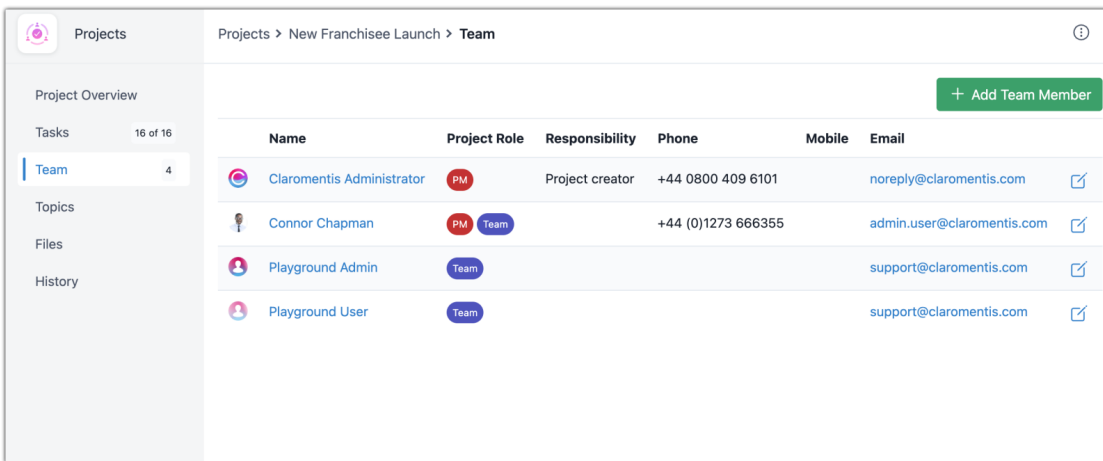


Team

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.

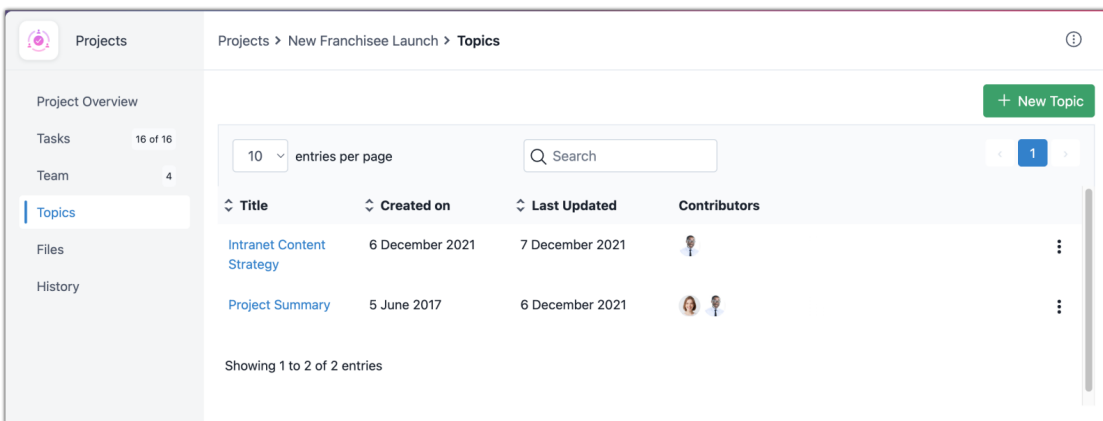


Topics

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

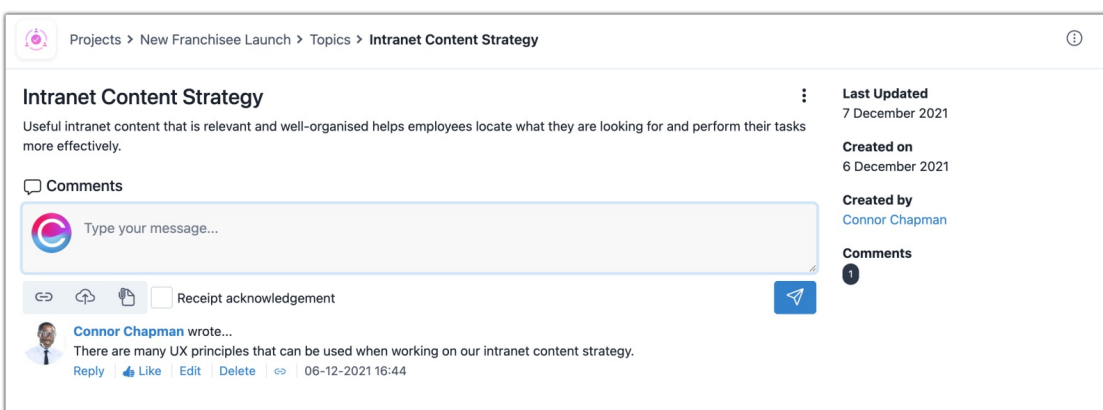
Users can contribute to the topics to allow conversation about the project's critical subjects.

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:

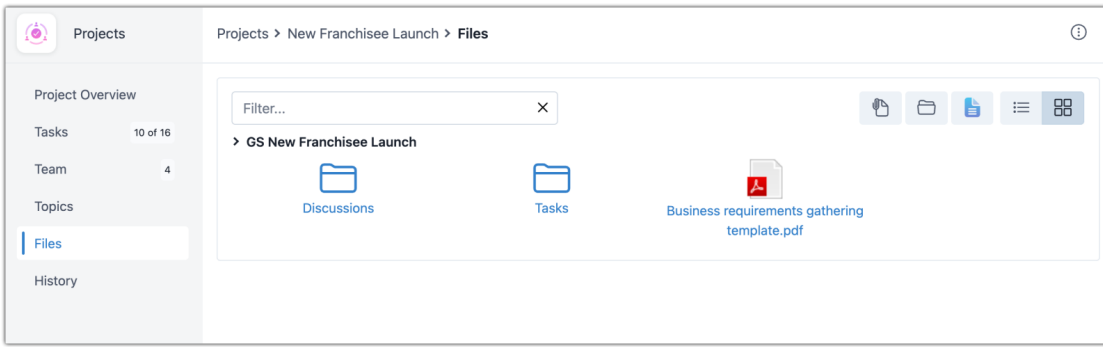


Files

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

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.