Project Overview - Outline

2/1/25

1) The project and its tasks are divided into several groups, called **<u>Sections:</u>**
    a. Additional Tasks
    b. Scheduling
    c. Logistics
    d. Service Approvals
    e. Estimate
    f. Contract
    g. Deposit Invoice
    h. Event Ready
    i. Event Complete
    j. Actuals
    k. Final Invoice

2) The lightning bolt above each Section represents **rule triggers:** as each task is completed, it will trigger new tasks to be created and automatically added to the project, to guide you through the workflow.
    a. When a rule is triggered, the lightning bolt will light up, and a popup in the bottom left of the window will show that a rule is currently running. Depending on the size of the rule, it may take a few minutes to fully complete. *(It's best to wait a few minutes after each step before continuing, to give the rules time to fully execute.)*
3) The list columns in the project are Name, Assignee, and Due date.
    a. **Name** describes the task itself
    b. **Assignee** shows the user the task is assigned to
        i. Note: for projects where multiple Coordinators are working together, individual tasks can be reassigned to different users by clicking on the Assignee next to the task and choosing another name.
    c. **Due date** shows the date by which the task needs to be completed for the project to remain on track
        i. Note: most tasks do not include due dates by default.
4) Clicking on a task in the project list will open the task window on the right side of the project window. This window gives you more detail information about a specific task including:
    a. Assignee
    b. Due date
    c. Projects
    d. Dependencies: if the task cannot be completed until its subtasks are completed, that will be indicated here.
    e. Description
    (you may need to scroll down in the task window to view the following items)
    f. Subtasks
    g. Comments: comments can be added to individual tasks. To notify a specific user in the comment, type **@** or click the @ button at the bottom of the comment area. You can also upload files to a comment by clicking the paperclip button.
    h. Activity log
    i. Collaborators: to add additional people as collaborators to an individual task, fine the Collaborators section at the bottom of the task window and click an empty icon or the + sign to add names to the task.
5) If there are subtasks included in a task, you'll see the number of subtasks and the subtask icon next to the task name in the project list. You can click the arrow button to the left of the task name to expand the task and see its subtasks. You can also click on the subtask icon to view the subtasks in the task window.
6) At the top of the project window, there are various tabs that serve different functions:
    a. **List:** the main task list view
    b. **Messages**: send general messages to users in the project
    c. **Files**: upload files to the project
    Click the + sign to see additional options, including:
    d. **Note:** store general notes in the project
7) To hide completed tasks from your list, click the **Filter** button above the task list, and select **Incomplete tasks.** You can save this view by clicking the **Save view** button to the right.