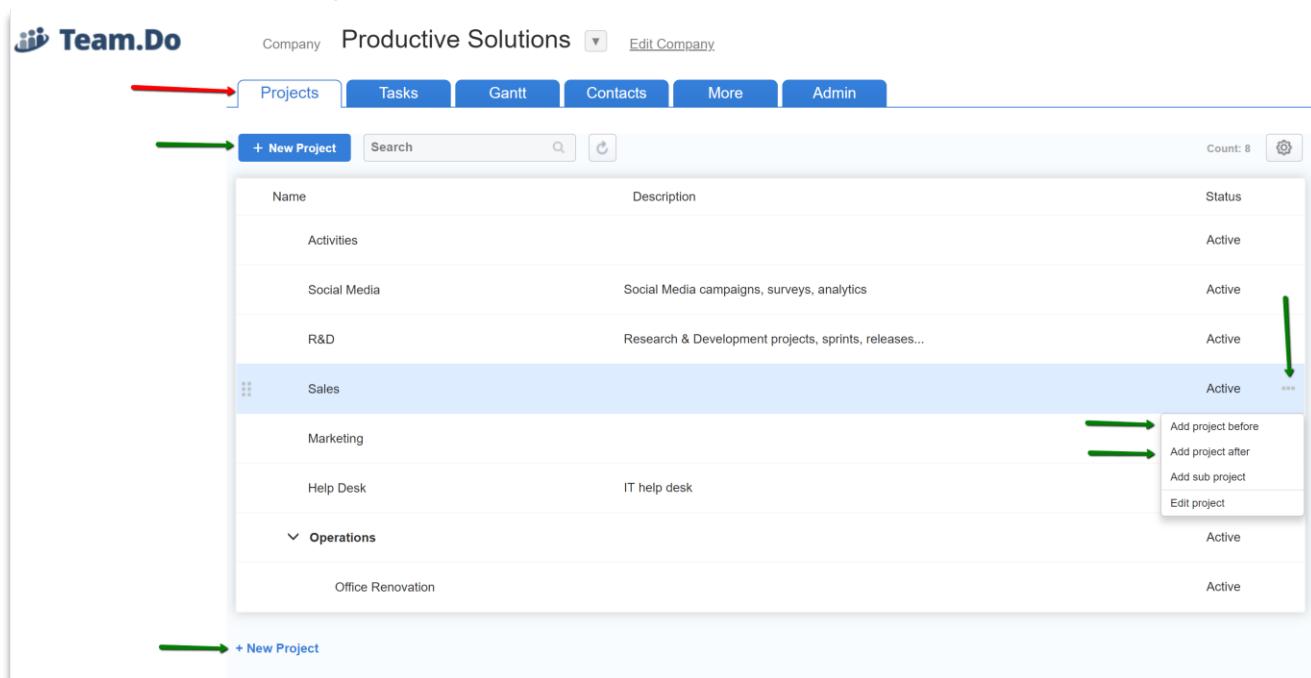


Team.Do – Project Management

Think of projects as containers or ways to group tasks together around a common topic, field, client, team or any other common factor.

1. **Creating a Project:** Navigate to the Projects tab and click on “+ New Project” button (located at the top and the bottom of the projects table). If there’s a specific location you need to position the new project, you can add a project before or after another project.

This option is located under the  menu. Click the  link to open the menu and select the relevant option.



The screenshot shows the Team.Do Project Management interface. At the top, there's a navigation bar with tabs: Company (selected), Productive Solutions, and Edit Company. Below the navigation bar is a search bar with a 'Search' input field and a magnifying glass icon. To the right of the search bar is a 'Count: 8' label and a gear icon. The main area displays a table of projects with columns: Name, Description, and Status. The table contains the following data:

Name	Description	Status
Activities		Active
Social Media	Social Media campaigns, surveys, analytics	Active
R&D	Research & Development projects, sprints, releases...	Active
Sales		Active
Marketing		Active
Help Desk	IT help desk	Active
Operations		Active
Office Renovation		Active

At the bottom left of the table is a green arrow pointing to the '+ New Project' button. On the far right of the table, there's a vertical ellipsis icon. A green arrow points down from this icon to a context menu. The context menu has four items: 'Add project before', 'Add project after', 'Add sub project', and 'Edit project'. At the very bottom left of the interface is another green arrow pointing to the '+ New Project' button.

Each project has 5 attributes:

- a. Name: Will be displayed throughout the system and used for filtering.
- b. Description
- c. Access: By default, projects are created accessible to all users in the system. You can [limit/restrict users' access to projects](#)
- d. Contacts: You can connect relevant contacts to projects for easier access and information grouping.
- e. Status: Projects are created in Active status. Additional statuses available are Not Active and Completed. At this stage these statuses play no role in the system and are for information only.
- f. Tasks: Once tasks are created for this project, this attribute will display the overall/open number of tasks.

- 2. Restricting Access to Projects:** There are two ways to restrict users' access to projects:

- a. **From Projects' details:** Click on the "Change" link [Everyone can see this project Change](#).

The text will now read "Only the following users see this project" and a small flyout

Only the following users see this project [Change](#)

Michelle Kofler	Admin
Shiri Huberman-Lamm	Admin

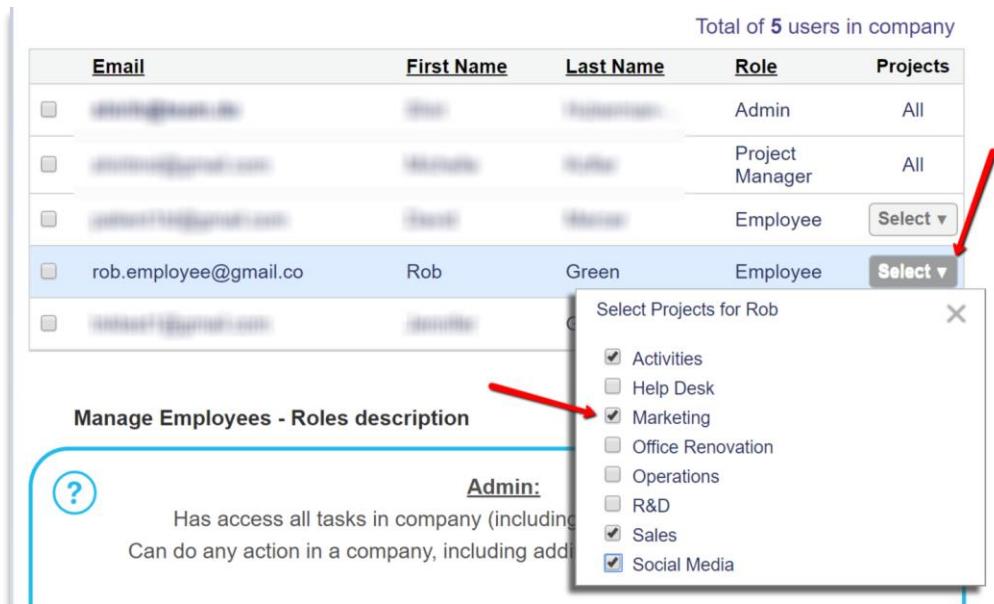
Click to add

menu will open

displaying users with Admin and

Project Manager roles (their role permissions allow them access to ALL projects in the system). To grant access to additional users to this project, use the "Click to Add" link to access the list of all users in the system.

- b. **From Users' management page:** As mentioned above, users with Admin and Project Manager's permissions, have access to all projects in the system. You can restrict access of users with lower level of permissions – Employee, External User and Viewer Only – to projects. Navigate to the [Admin page](#).



The screenshot shows a table of users with columns: Email, First Name, Last Name, Role, and Projects. A red arrow points to the 'Select' button next to the 'Projects' column for a user named Rob Green. A modal window titled 'Select Projects for Rob' is open, listing various project categories with checkboxes. Several checkboxes are checked, including 'Activities', 'Marketing', 'Sales', and 'Social Media'. Another red arrow points to the 'Select' button in the modal window.

Total of 5 users in company				
Email	First Name	Last Name	Role	Projects
[redacted]	[redacted]	[redacted]	Admin	All
[redacted]	[redacted]	[redacted]	Project Manager	All
[redacted]	[redacted]	[redacted]	Employee	Select ▾
rob.employee@gmail.co	Rob	Green	Employee	Select ▾
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

Manage Employees - Roles description

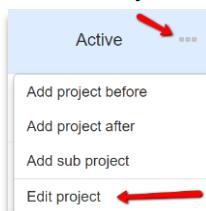
Admin:
Has access all tasks in company (including...
Can do any action in a company, including add...

Select Projects for Rob

- Activities
- Help Desk
- Marketing
- Office Renovation
- Operations
- R&D
- Sales
- Social Media

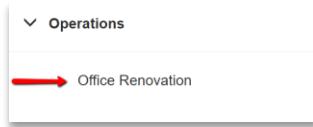
Select the relevant user and click the [Select](#) button and select/unselect projects as needed to allow or restrict access.

- 3. Editing Project Details:** Edit Project option is located under the  menu located next

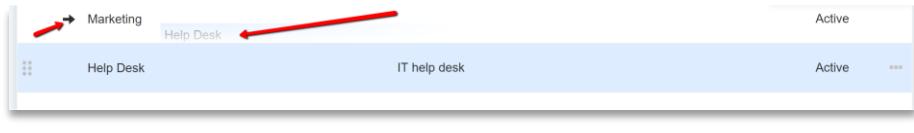


to the projects' status.

- 4. Sub Projects:** Sub Projects are regular Projects nested (linked) under a parent project. You can create a sub project using the menu above and selecting “Add sub project” option and a New Project window will open. Once you create the project, you will see it



nested under its parent project . If you have an existing project that needs to be a sub project you can click on its name and simply drag it under the

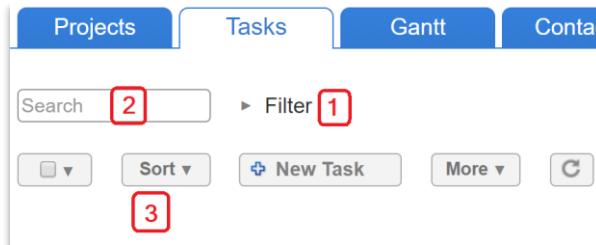


relevant project

5. Sorting and Filtering by Project:

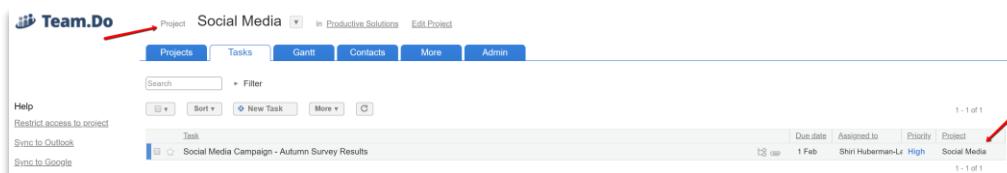
When managing projects with a lot of details, many tasks may accumulate.

You can control the information by simply changing the view in the Tasks page, by

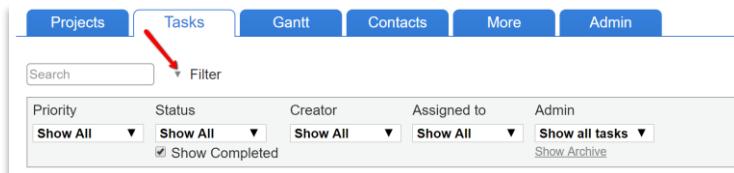


sorting and filtering

- 1. General Filtering by Project (or sub project):** If you want to view only tasks of a specific project, you can simply select the project (or sub project) from the list at the top of the page



- 2. Filter:** Click on the ► next to “Filter” to expose the filter menu:



By default, users with Employee, External User or View Only permissions will see only tasks they are involved in when they enter the Tasks page. Admin and Project Manager see all tasks in the system.

You can filter by task priority, status, creator, owner (“Assigned to”) and if you have Admin permissions you can choose to see all tasks or only the ones they are directly involved in.

3. **Search:** You can filter by searching for specific text within the tasks.