

Project Panel – overview

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Your event Project Management tool

There are three ways to view Project Manager:

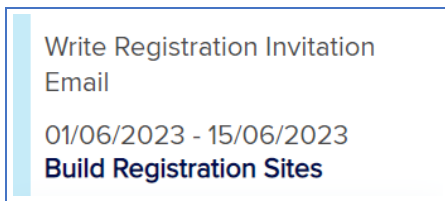
- Grid
- Cards
- Calendar

Grid View

The Grid View is a completely interactive display of each project, task and subtask. You can edit entries directly within the grid.

- **Quick Edit Menu** – also called the Hamburger Menu (three horizontal lines), you can perform essential functions such as:
 - Insert Above
 - Insert Below
 - Promote
 - Demote
 - Edit
 - Clone
 - Delete
- **Rank** – you can enter a number ranking in this column which can be used to sort by rank
- **Items** – the actual project name, task or subtask. You can edit these inline, or select Edit from the Hamburger icon on the far left
- **Team Members** – the name(s) of the team members assigned to this item
- **Status** – the status of the task or subtask
- **Progress** – the progress percentage for the task or subtask
- **Start/End** – the start and end dates for each task or subtask
- **Note** – you can enter a note for each project, task or subtask here
- **Email Reminders** – checking this for a specific project will email a project reminder to the the Project Manager
- **Milestone** – checking this will enable Milestone Increments for each task or subtask
- **Milestone Alert** – checking this box will enable Milestone Alerts
- **Alert Level and Message** – if you have selected Milestone Alerts, you can choose the Milestone Alert level as well as enter the Milestone Alert Message here
- **Custom Fields** – any custom fields you have assigned to the Project Manager will be displayed inline as well

Cards View



The Cards View lets you see projects, tasks and subtasks as individual cards that can be dragged and dropped within different status categories, which are:

- Not Started
- On Hold
- Deferred
- In Progress
- Completed

You can also see all cards sorted by Team Member.

Using Project Manager Cards

Clicking on any card will jump to the detail and setup options for the selected task.

Elements shown on the cards are:

- Task or Subtask name
- Assigned team member
- Start and end dates of the task or subtask
- Project name that the task or subtask is assigned to

Other Project Manager features:

The following items are features of the Project Manager. These icons are available at the top left and far right side of the Project Manager panel.

- [Add Project](#)
- [Add Task](#)
- [Excel Import and Export](#)
- [Project Filter](#)
- [Promote and Demote](#)
- [Re-Assign Project Members](#)
- [Re-Assign Project Dates](#)

Gantt View

Note: This view is only available in the Desktop App

The sections of the Gantt View are:

- **Quick Edit Menu** – also called the Hamburger Menu (three horizontal lines), you can perform essential functions such as:
 - Insert Above
 - Insert Below
 - Promote
 - Demote
 - Edit
 - Clone
 - Delete
- **Items** – Your projects, tasks and subtasks are shown here
 - **Projects** are where you define each unique Project that you are undertaking for this event. The green project bar in the timeline section indicates the defined start and end of the Project, and it compares to the defined start and end dates to the tasks underneath it.
 - **Tasks** are individual assignments underneath a Project. Tasks are assigned to Team Members, and will track Status and Progress. You can assign tasks and sub tasks by using the Promote and Demote options on each task line.
- **Team Members** – all assigned Teams Members will be shown here
- **Status** – you can change the status at any time to any of the following:
 - Not Started
 - On Hold
 - Deferred
 - In Progress
 - Completed
- **Progress** (in percentage complete)
- **Start date and time**
- **End date and time**
- **Delete project item link**
- **Timeline Section** – provides a graphical view in a Gantt Chart format.

Tip: You can resize the Details Section wider or narrower so you can see more of the Timeline, simply by dragging the Boundary Edge left or right. Depending on if each is full width or reduced, you will also see scroll bars for scrolling up/down and left/right as needed.

