

# Project panel (Event Project Manager) features

Last Modified on 06/03/2024 5:33 am EDT

## Add a project

### Project ✕

Details

Description\*

Project Managers

Note

Milestone Increment

Email task reminders To Project Managers

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[Save](#)

After you've added a new project, your options include:

- **Description**
- **Project Managers** – choose one or more managers for this project.
- **Note** – a free-form text field to record any required details about this project.
- **Milestone Increment** – select to display a milestone marker.
- **Email Task Reminders to Project Managers** – automatically generate helpful reminder emails to Project Managers about task due dates in this project.

## Adding new tasks

## Task

Details

Description*	Create Conference Brochure		
Team Members	James Wilson X		
Status*	In Progress		
Start Date	30/11/2022	📅 Start Time	7:00 AM ⌚
Due Date	01/12/2022	📅 Due Time	4:00 PM ⌚
% Completed	0.00%		
Note	Will be printed and distributed in advance		
Milestone Increment	<input checked="" type="checkbox"/>		
Milestone Alert	<input type="checkbox"/> Send an Alert when a Milestone is not complete by the due date		
Alert Level	Information		
Alert Message	Project Milestone was not completed:		

Save

Selecting Add Task lets you add new Tasks to your Project. Your options include:

- **Description**
- **Team Members** – select from a drop down list.
- **Status** – lets you set the beginning status.
- **Start Date/Time**
- **Due Date/Time**
- **Percent Completed**
- **Note**
- **Milestone Increment** – select to display a milestone marker.

## Import

This option lets you enter your project details in an Excel Spreadsheet and import your project directly into EventsAir. There's a wizard to help you match your data fields to the corresponding fields in the Project Manager.

### *Important Considerations*

- You must create your Projects prior to import, and you will select the specific Project that you will be importing details into.
- You must select a Date Format that matches the date format used in your projects, and use this in your import details as well.
- While Start Date/Time and End Date/Time are shown together in the Project List, they are imported via their own separate columns.
- You will assign team members, status, and progress items **after** the import is complete.

## What You Can Import

There are six types of data you can import into a specific project:

- **Name** – the task name
- **Note** – the project task note
- **Start Date** – use mm/dd/year or dd/mm/year format as required by your region
- **Start Time** – use military (24 hour) time format
- **Due Date** – use mm/dd/year or dd/mm/year format as required by your region
- **Due Time** – use military (24 hour) time format

## Importing Data

When you click on Import, you should follow these steps:





1. Select your **import data file** (Excel format).
2. Select the **Project category** that you plan to import into.
3. Select the **Date Format** for your region (and reflected in your spreadsheet).
4. **Assign each column** from your spreadsheet to the corresponding field in the Project list.
5. Select **Import** to complete the import process.

## Export

This option will let you export your detailed project list to Excel, maintaining the same general format.

### Filter ✕

Details

Project(s)	Select Projects
Task / Note	
Team Members	Select team members
Status	Select status
Start Date	DD/MM/YYYY  to DD/MM/YYYY 
Due Date	DD/MM/YYYY  to DD/MM/YYYY 
Milestone	<input type="checkbox"/>

[Clear](#) [Cancel](#) [Apply](#)

## Filter

Selecting the **Filter Option** lets you filter your Project Manager view to see specific items, such as:

- Projects
- Tasks/Notes
- Team Members
- Status
- Start Dates/Times
- Due Date/Times
- Milestones

Any custom fields you may have created for the Project Manager can also be filtered on.

## Promote/Demote a Task

This option lets you select a specific task and either demote it or promote it, in relation to the task before it.

- Demoting a task will make it a sub-task of the task before it.
- Promoting a task will move a demoted task back to its main level.

## Re-assign team members & task dates

### Re-assign Team Members ✕

**Option**

All Tasks For This Event

All Filtered Tasks

All Highlighted Tasks

**Reassign From** Not yet assigned ▾

**To** Unassigned ▾

**Reassign**

Selecting **Re-Assign Team Members** lets you assign or re-assign tasks to Team Members. You can choose from:

- All Tasks for This Event
- All Filtered Tasks


- All Highlighted Tasks

### Re-assign Task Dates ✕

**Option**


- All Tasks For This Event
- All Filtered Tasks
- All Highlighted Tasks

Start Date

Set Date To  

Advance Date By

Due Date

Set Date To  

**Reassign**

Like Re-Assigning Team Members, **Re-Assign Task Dates** lets you choose tasks and either change the Start Date, Due Date, or incrementally advance either date by a specific number of days.

You can choose from:

- All Tasks for This Event
  - All Filtered Tasks
  - All Highlighted Tasks
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