



Quick Start Guide



Let's achieve great things together

Welcome to the first day of the rest of your work life! I encourage you to leverage this guide to ensure you're getting the most out of your free ProjectManager trial.

Regardless of where or how you work, you can take advantage of our project management software for teams. While it was once commonplace to rely on multiple apps to get work done, teams of all sizes and in all industries can benefit from a streamlined project management solution.

ProjectManager offers thoughtful features, real-time updates and dynamic templates for you to stay productive while ensuring quality.

Read through our guide, enjoy your free trial and don't hesitate to reach out to our amazing team with any questions!



Kevin Riegelsberger
CEO of ProjectManager

A handwritten signature of Kevin Riegelsberger in black ink, written in a cursive style.

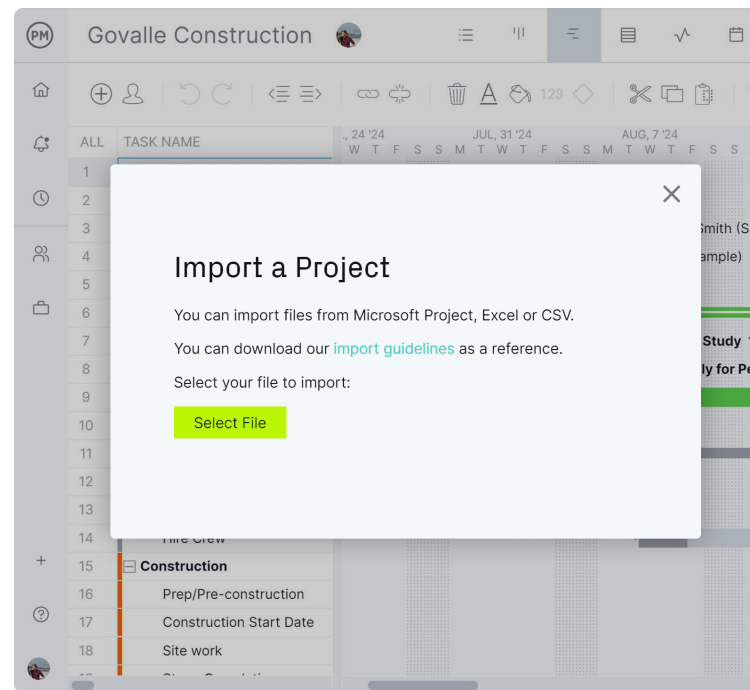
“It was once commonplace to rely on multiple apps to get work done, but our software streamlines work management through thoughtful features, real-time updates and dynamic templates.”

Importing projects and tasks

Get started quickly by importing project files from Microsoft Project, Excel or CSV.

Use importing to:

- ✓ Turn static spreadsheets into online projects
- ✓ Add external data to a new or existing project
- ✓ Import data, collaborate with teams & export it to share with stakeholders

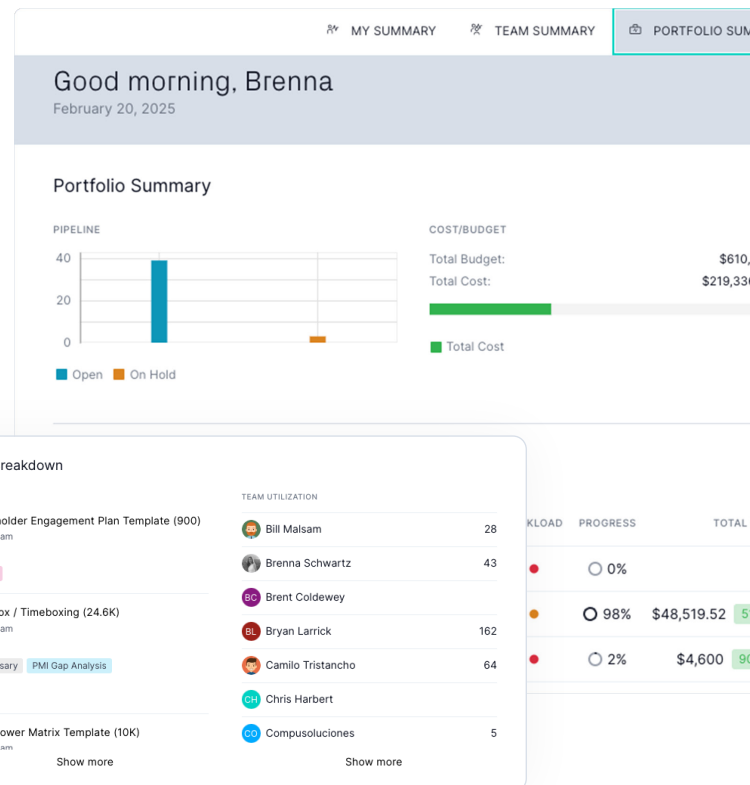


Home view

If you need one spot to keep track of all of your tasks across projects, Home is it.

In the Home view, users can:

- ✓ View automatic dashboards that track their work, team and portfolio
- ✓ See data on task progress, workload and time to determine how projects are evolving
- ✓ Manage assigned tasks with lists, kanban and calendar views



Gantt chart

The Gantt chart is a project scheduling tool that has a task list and data grid on the left and a visualization of this data on the right.

Use the Gantt view to:

- ✓ Manage financials, assignees, due dates and more
- ✓ Coordinate and balance team schedules
- ✓ Import project plans from tools such as Microsoft Project or Excel

Task Info

GENERAL LINKS PEOPLE DEPENDENCIES

Name: Determine Timeline

Planned Start: 3/14/2024 Due: 3/14/2024

Actual Start: 3/14/2024 Finish: 3/15/2024

Baseline Start: Finish:

Sheet

The sheet view allows you to use the Gantt data grid without the bar chart. Set up the Gantt one way and the sheet another without impacting data; each experience is unique.

Utilize the sheet view to:

- ✓ Create custom columns to track and analyze key areas like resource costs
- ✓ Oversee resource details including team workload, project expenses and more
- ✓ Share filtered project data with key stakeholders

Show, hide or create columns

CREATE CUSTOM COLUMN

Custom column name Text Create

SHOW/HIDE COLUMNS

- Actual Cost
- Actual Duration
- Actual Finish Date
- Actual Hours
- Actual Resource Cost
- Actual Start Date
- Assigned
- Baseline Finish Date
- Baseline Start Date
- Complete
- Duration
- Info
- Planned Finish Date

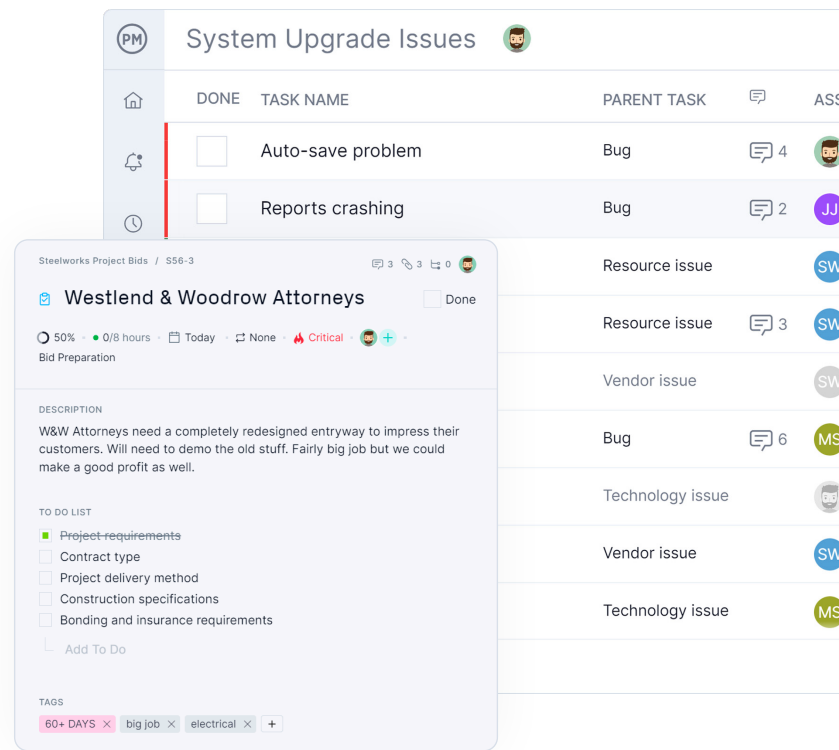
Done Edit custom columns

List

The task list organizes all project tasks in a familiar list format where teams can assign priorities, create filters and collaborate. It's the ideal view for task execution.

Use the list to:

- ✓ Organize tasks by assignee, due date, priority, tags and more
- ✓ Create weekly tasks or kick-off checklists for your team to knock out projects
- ✓ Collaborate with your team on punch lists or daily work

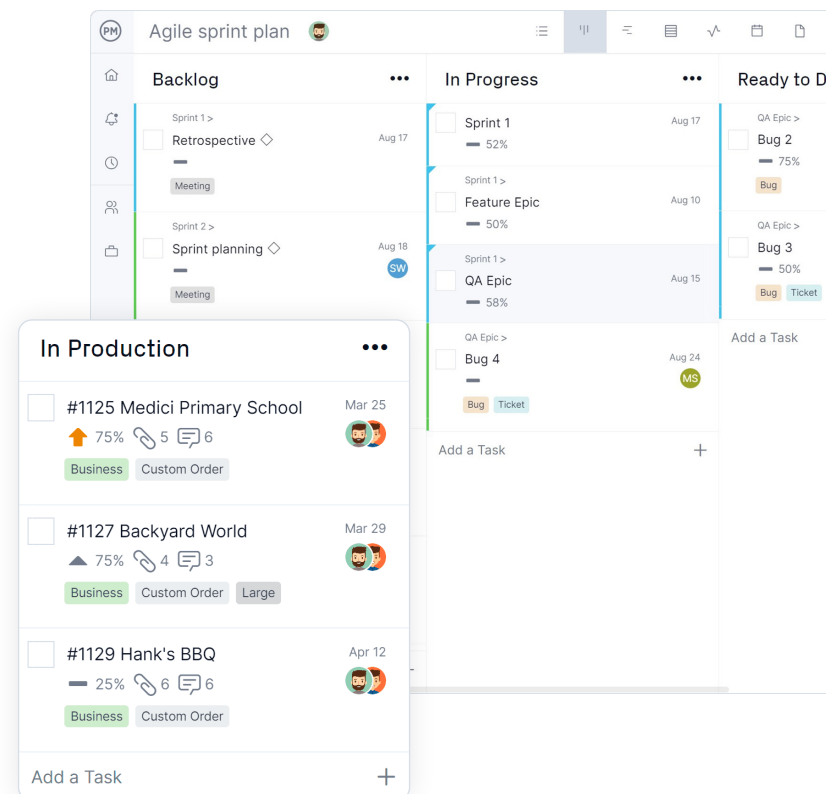


Kanban board

The board view displays all project tasks across custom columns known as statuses. Drag tasks between columns and create a visual workflow for your team.

The board can help teams:

- ✓ Tailor custom workflows for specific needs
- ✓ Pinpoint bottlenecks in production cycles
- ✓ Make progress on plans without needing the Gantt view

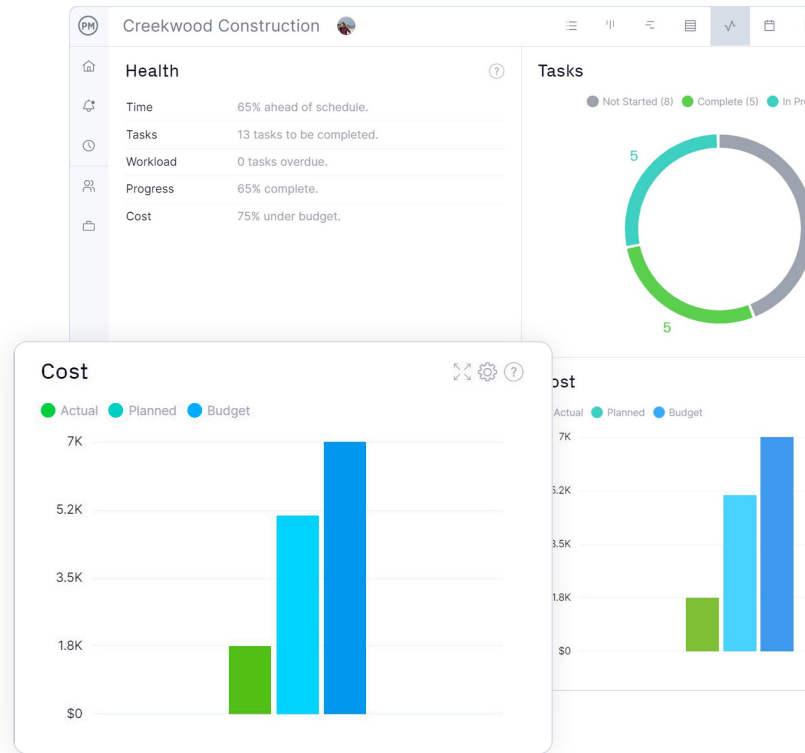


Project dashboard

The dashboard includes six charts and graphs that track the project's health, tasks, progress, time, cost and workload.

Use the dashboard to:

- ✓ Track costs, hours, assignments, task progress and more
- ✓ Compare planned vs. actual data to see if the project is on track
- ✓ Spot issues within the project before they snowball

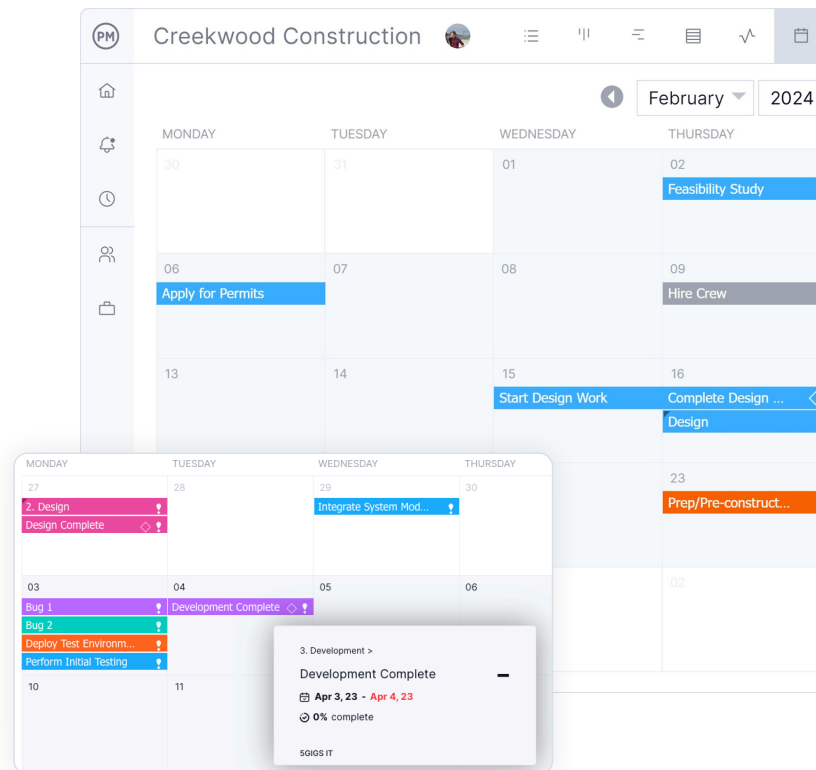


Calendar

The calendar view visually represents your current workload and projects in a familiar format. It's ideal for quickly building schedules and dragging and dropping tasks when due dates change.

Use the calendar to:

- ✓ See key dates and milestones at a glance to measure project progress
- ✓ Track a department's activities within a shared calendar
- ✓ Develop content calendars

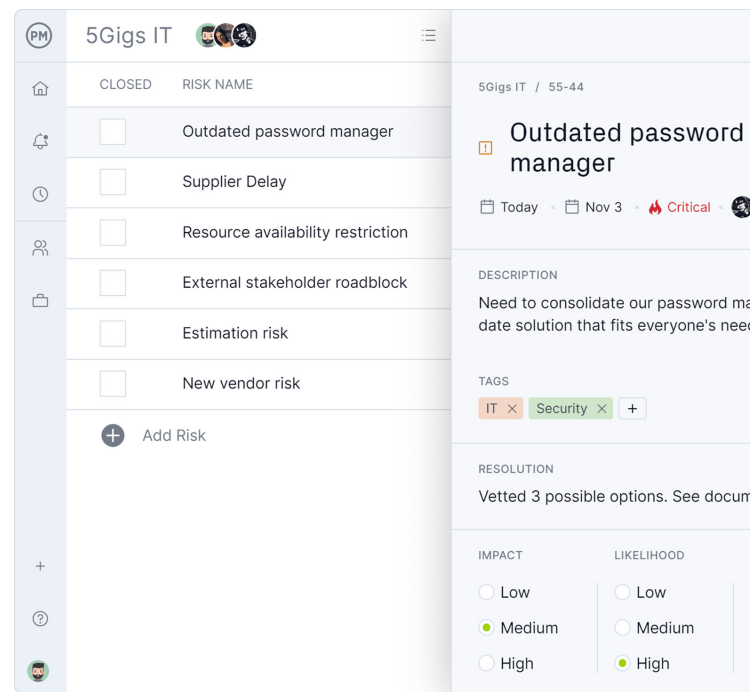


Risk management

This feature assigns an impact and likelihood to project risks, automatically adjusting the matrix widget. Each risk has a card with rich functionality, collaboration and fields for detailed information.

Use risk management to:

- ✓ Avoid impacting the project budget, scope and deliverables
- ✓ Log, monitor and analyze positive and negative risks
- ✓ Assign details like a risk owner, priority level, due date and response

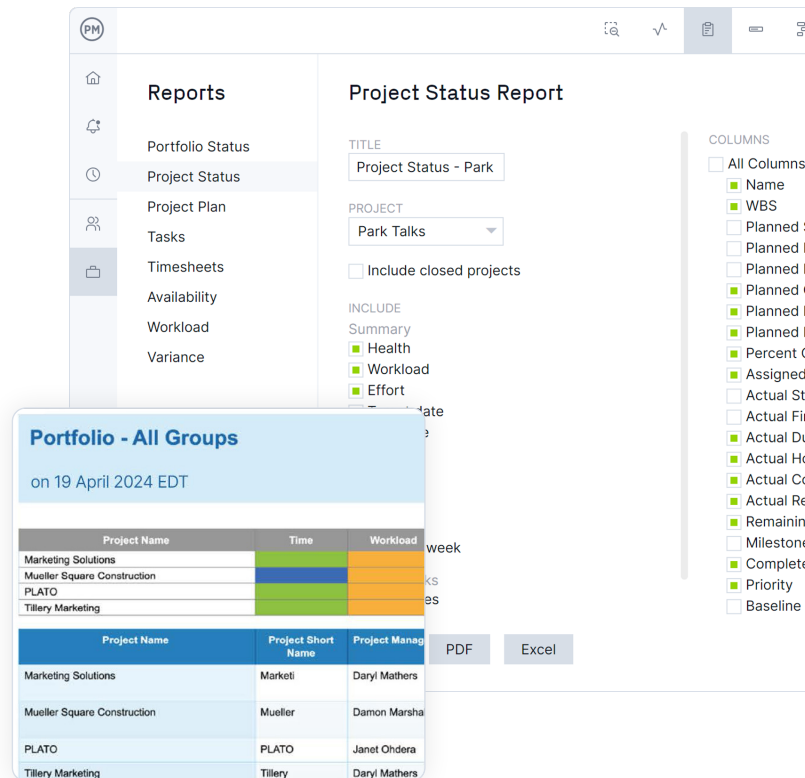


Reports

Create and customize eight reports including portfolio status, project status, project plan, tasks, timesheets, availability, workload and variance. Save them as a PDF or Excel file.

Utilize reports to:

- ✓ See the health of your project or portfolio
- ✓ Customize the information you share with stakeholders
- ✓ Monitor project budgets and timelines

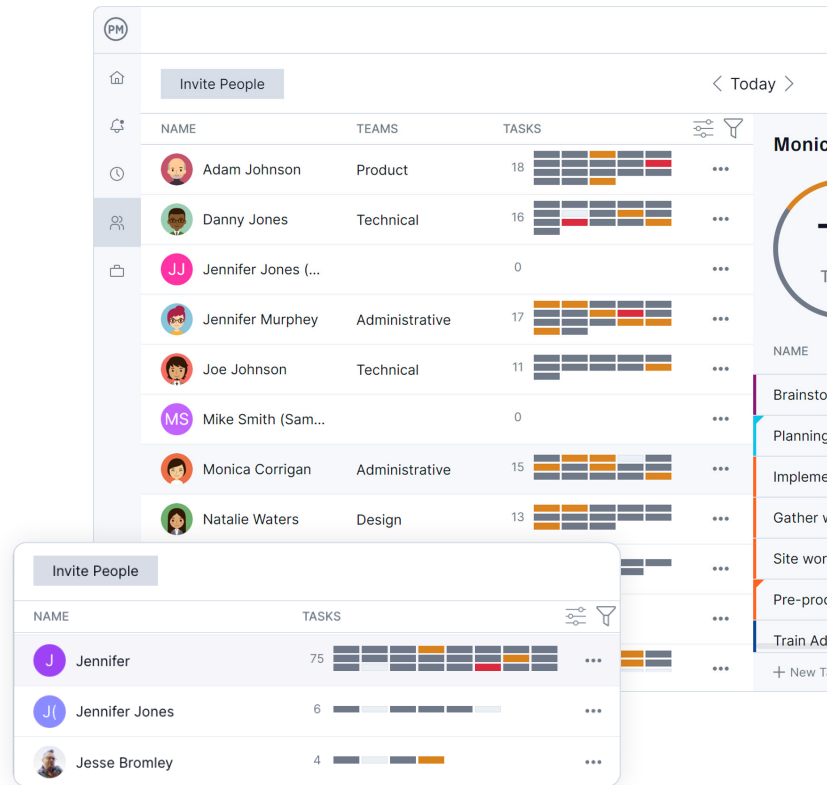


Team page

See an overview of what team members are involved in what tasks, including a task breakdown and task priority.

Use the team page to:

- ✓ View an updated directory of the team and their workload
- ✓ Determine which team members have the bandwidth to take on additional tasks
- ✓ Redistribute workload to find the ideal balance across teams

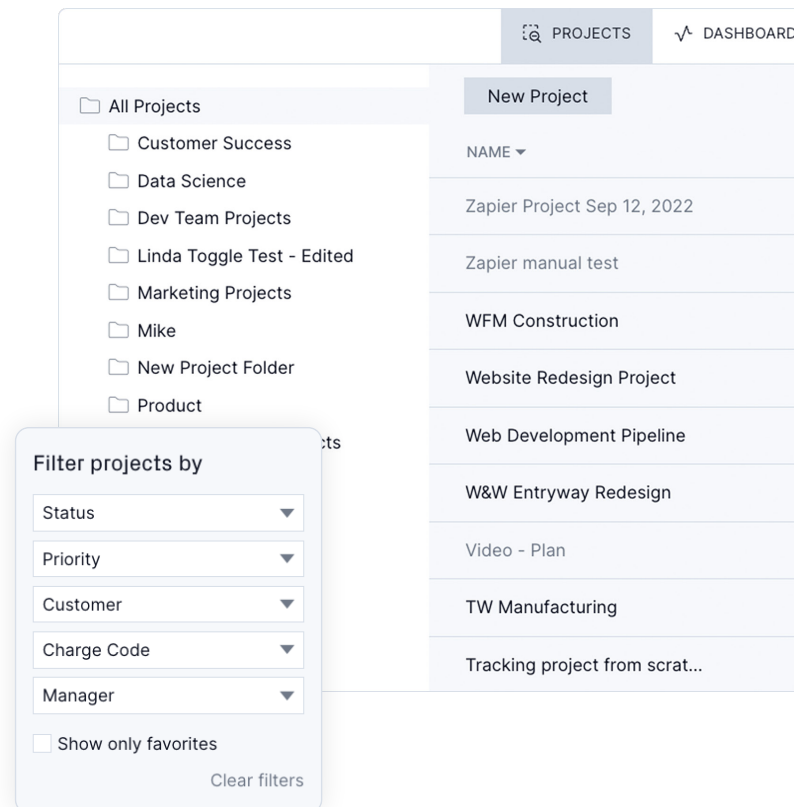


Portfolio projects

This is where you'll find all of your projects in one place. Organize projects into sub-folders for program management or track projects by department, client, etc.

With portfolio projects, you can:

- ✓ Organize projects into folders using filters
- ✓ Get fast status updates for projects at a glance
- ✓ Change project status, create custom templates, export data and more

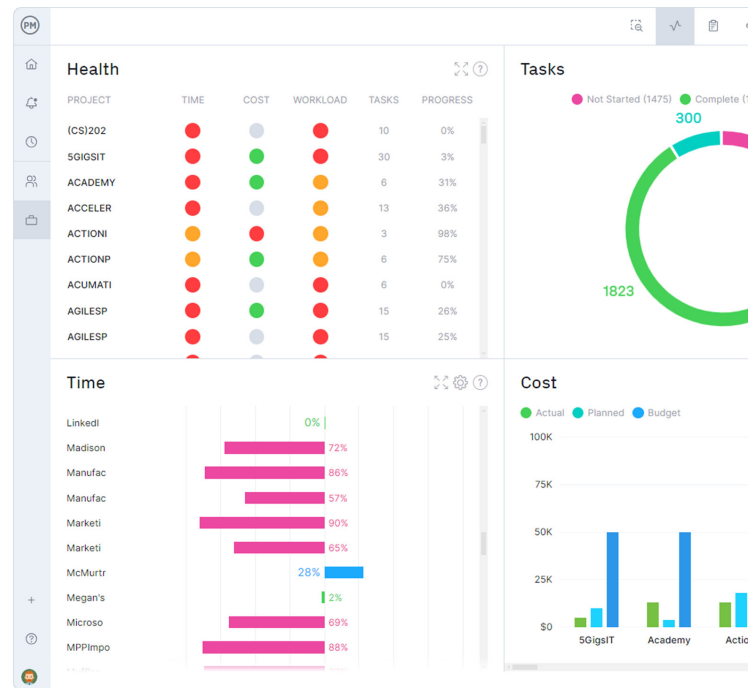


Portfolio dashboard

The portfolio dashboard collects data from all projects, tracking their health, tasks, progress, time, cost and workload.

The portfolio dashboard can help you:

- ✓ Create filters to determine which projects are ahead of schedule, on time and behind
- ✓ Understand actual vs. planned costs to compare them to the original budget
- ✓ Track performance of specific project managers and project types

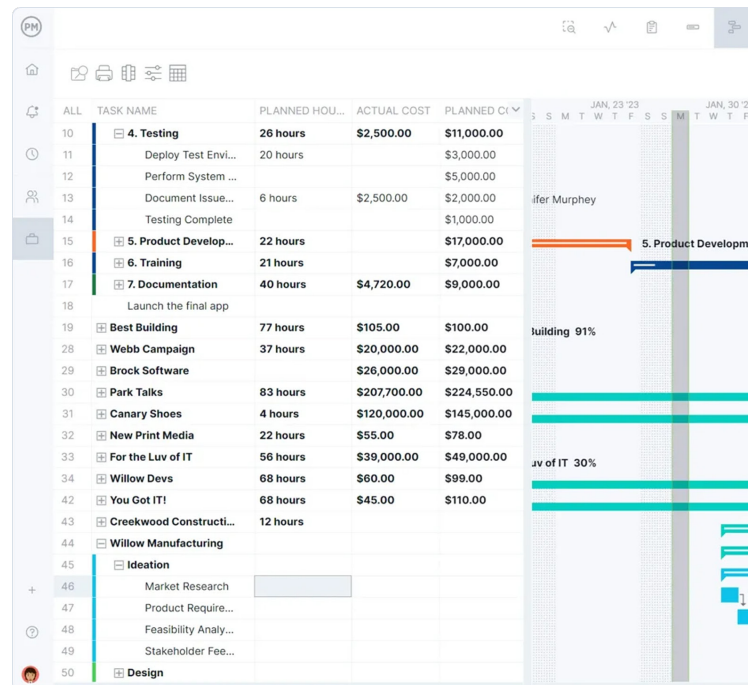


Roadmap

View all projects on a single timeline using the roadmap. It's ideal for tracking high-level information such as start and finish dates, project duration and planned vs. actual data in the familiar Gantt view.

Leverage the roadmap to:

- ✓ Determine how many projects can be executed in a certain period
- ✓ Plan long-term projects that extend through multiple quarters
- ✓ Repeat tasks that you want to compare progress against

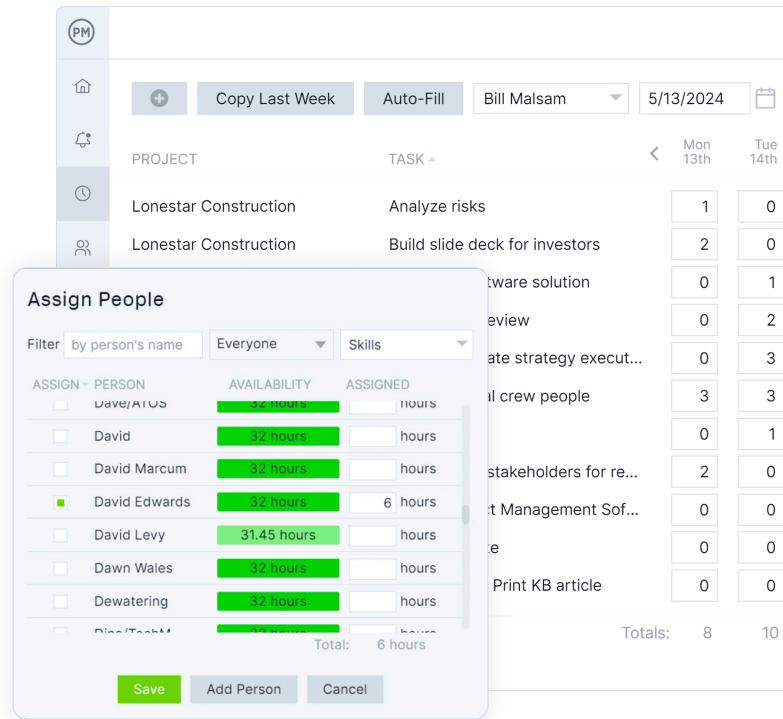


Timesheets

Our timesheets provide an all-in-one tracking solution for logging hours, streamlining payroll and monitoring progress.

Teams utilize timesheets to:

- ✓ Ensure quality by submitting timesheet approvals to the appropriate person
- ✓ Keep remote and field teams productive by ensuring hours are logged accurately
- ✓ Generate timesheet reports to keep stakeholders informed

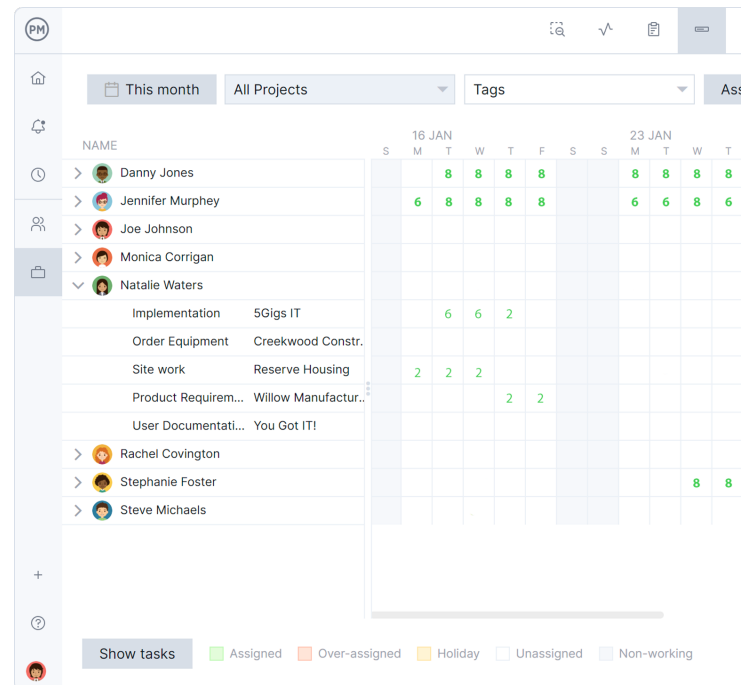


Workload

This feature allows you to see your planned effort across your portfolio. It's the ideal place to help build resource plans and schedules for your team.

The workload chart is the ideal place to:

- ✓ See task breakdowns by number of hours
- ✓ Reassign tasks and oversee resource management
- ✓ Adjust the planned effort on a task in real time

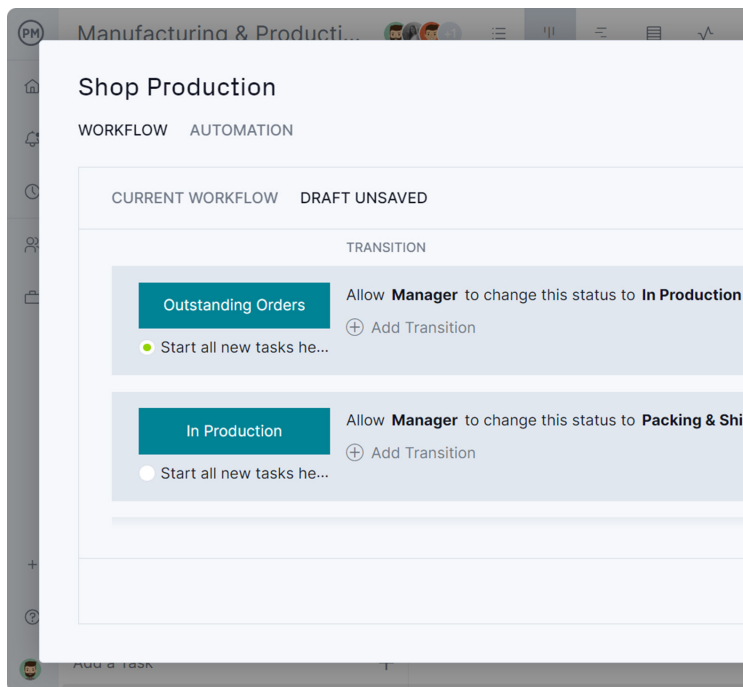


Workflow

Workflow is about establishing rules and quality control within a project as it allows users to enforce rules regarding the path a task must follow.

Set workflow rules to:

- ✓ Define which users can move a task through various stages
- ✓ Set certain task rules and approvers before tasks can be moved
- ✓ Copy a custom workflow so you don't have to build it manually every time

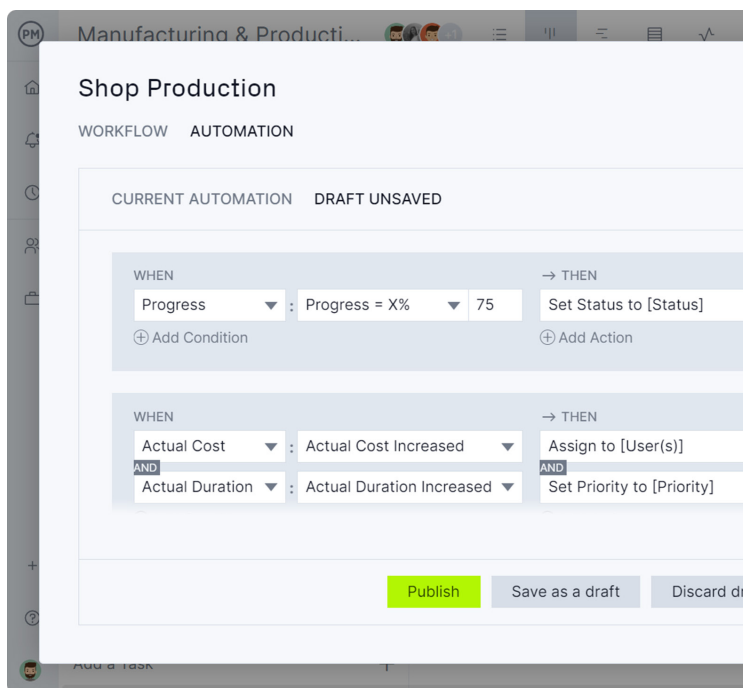


Automation

This feature uses simple “when” and “then” language to define triggers and actions within a workflow. Use it on its own or alongside our workflow feature.

Utilize automation to:

- ✓ Streamline administrative tasks
- ✓ Save time and catch errors that could derail the project
- ✓ Avoid updating tasks manually

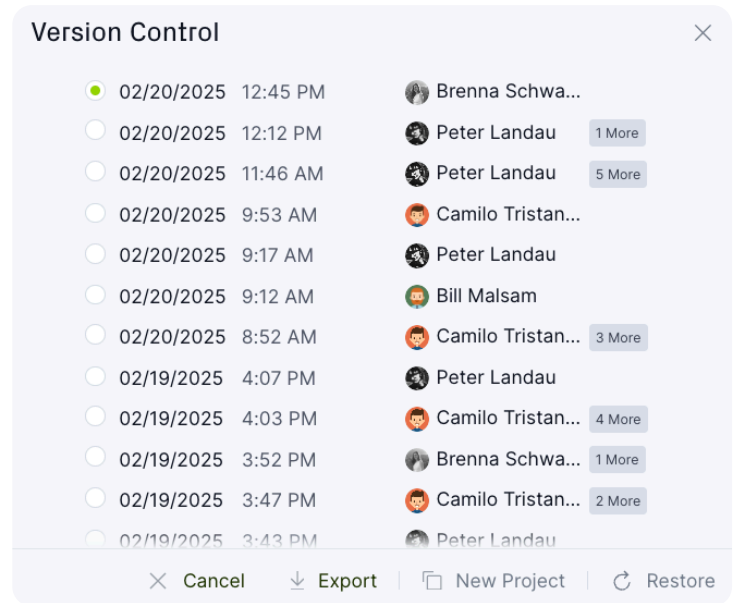


Version control

Version control is automatic for every project. It tracks every change made to a project so you can revert to any previous project point.

Use version control to:

- ✓ Create a backup project to compare historical and live project versions
- ✓ Share past project data with key stakeholders
- ✓ Revert to a previous project version if there's been a mistake

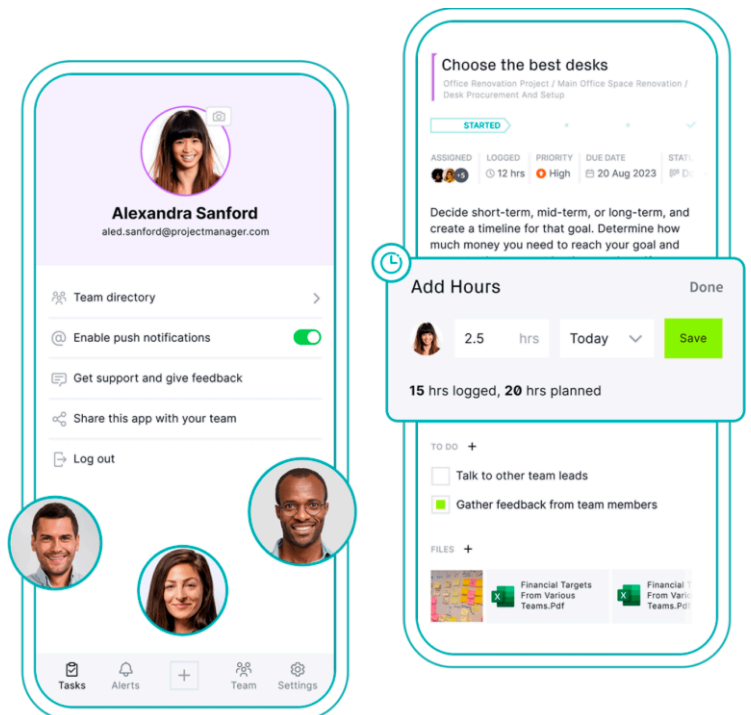


Mobile app

Download ProjectManager on your Apple or Android device to stay updated on your projects wherever you're located.

Use the mobile app to:

- ✓ View and manage tasks even if you're away from your desk
- ✓ Add comments or photos directly from the field
- ✓ Log time and see hours previously submitted

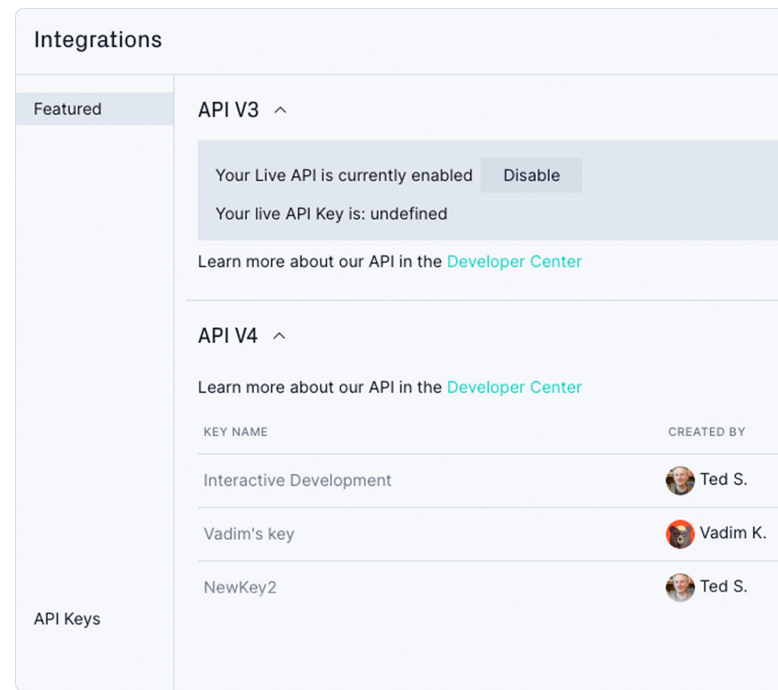


ProjectManager's API

The API enables you to build bespoke integrations between ProjectManager and thousands of other tools.

Utilize the API to:

- ✓ Automate day-to-day processes like creating a new project or comment
- ✓ Share real-time data between your favorite platforms
- ✓ Create customized workflows between software systems



KEY NAME	CREATED BY
Interactive Development	Ted S.
Vadim's key	Vadim K.
NewKey2	Ted S.

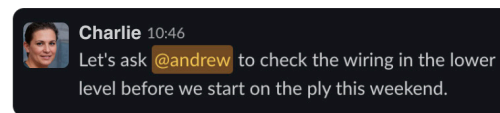
BUSINESS & ENTERPRISE

Third-party integrations

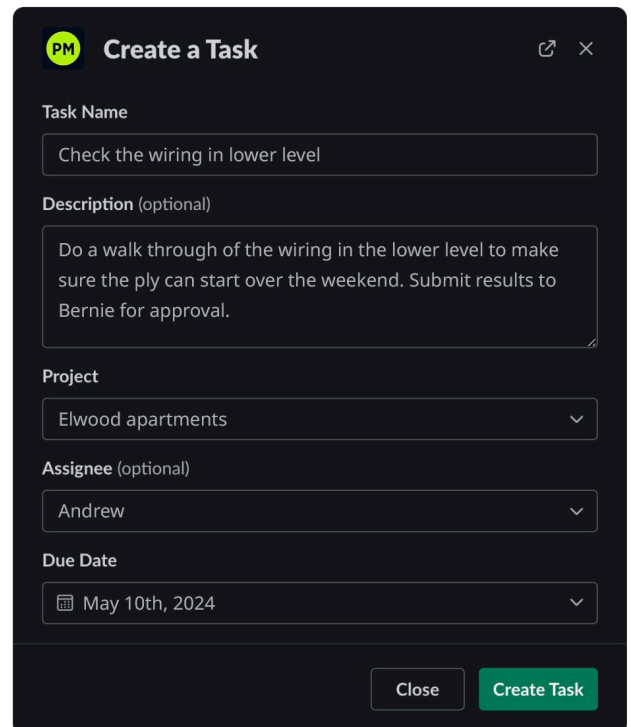
Integrate with apps like Slack, Acumatica, Jira, Microsoft Teams and more to stay connected across your favorite platforms.

Integrate with other apps to:

- ✓ Access and edit tasks on your desktop or mobile device
- ✓ See real-time two-way syncs between ProjectManager data and other apps
- ✓ Sync data to keep resources, time and costs up to date



Charlie 10:46
Let's ask @andrew to check the wiring in the lower level before we start on the ply this weekend.



PM Create a Task

Task Name: Check the wiring in lower level

Description (optional): Do a walk through of the wiring in the lower level to make sure the ply can start over the weekend. Submit results to Bernie for approval.

Project: Elwood apartments

Assignee (optional): Andrew

Due Date: May 10th, 2024

Close Create Task

Account and role security

Customize who can access certain areas of the software on an account level and make adjustments on a per-project basis.

Customize account and project security to:

- ✓ Restrict access to certain features or information on the account
- ✓ Set custom roles to define who can do what in each workspace
- ✓ Establish multi-factor authentication, SAML SSO and account password settings

The screenshot displays the 'Project Security' configuration interface. At the top, it states 'Give each project member the right controls for the project. Guest roles are read-only.' Below this, there are two columns of controls: 'Manage' (blue button) and 'Edit' (green button). A table lists various permissions with green checkmarks indicating they are enabled. A 'Project members' dropdown menu is open, showing a list of users with their roles and management options.

	Manage	Edit
COLLABORATE	✓	✓
Edit task title & description	✓	✓
Add comments, files, tags	✓	✓
Update progress	✓	✓
Log hours	✓	✓

Member	Role	Manage	Edit
Bill M.	(Creator)		
Brenna S.		Edit	
Camilo T.		Edit	
Lauren P.		Edit	
Peter L.		Edit	
Stephanie Ray R.		Manage	

Over 35,000 happy customers

“ProjectManager allows us to track projects, tasks, hours and resource allocation better than Jira and Microsoft Project.”



Yosef Ben Gershom
Operations Manager at
Hawai'i Space Flight Laboratory

“ProjectManager keeps adapting to what project managers need and that’s why we continue to stay.”



Stacy Kerns
Operations Manager at
Texas Health and Human Services

Join the ProjectManager community

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