



ProjectManager

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!



A handwritten signature in black ink that reads "Kevin Riegelsberger".

Kevin Riegelsberger
CEO of ProjectManager

"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."

A breakdown of our features

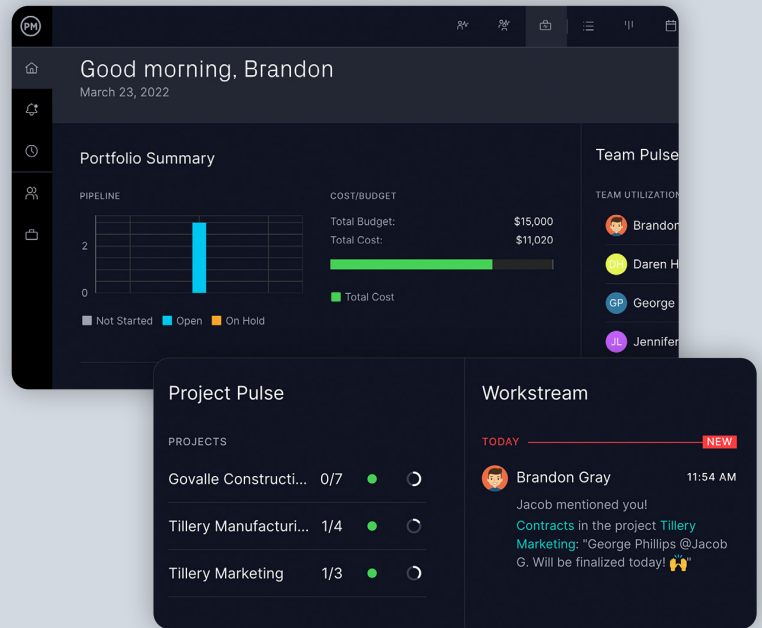
Our software offers multiple work views to allow your team to use the view that suits them best. As work occurs across views, all project details update in real time. Learn more about our features below.

Home

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

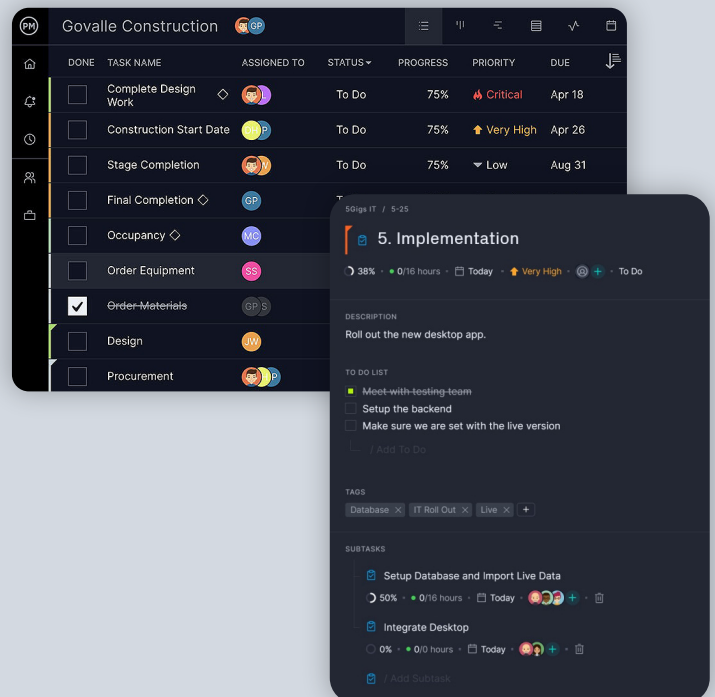


List

The List is an excellent place to assign task priorities, create filters and collaborate with team members along the way.

The List can be used to:

- ✔ Create weekly tasks or kick-off checklists for your team to knock out projects
- ✔ Collect action items during a meeting so talk turns to action
- ✔ Collaborate with your team on punch lists and daily work

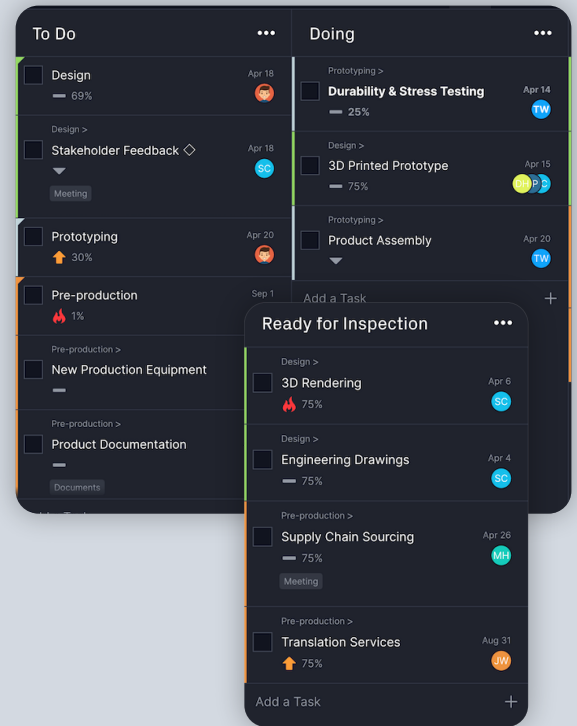


Board

If you're a visual person, you'll love the Board view. Use it to create a workflow for your team for smooth project execution.

The Board can help teams:

- ✓ Tailor workflows for their specific needs
- ✓ Pinpoint bottlenecks or speed bumps in production cycles
- ✓ Work together on plans without needing the Gantt view

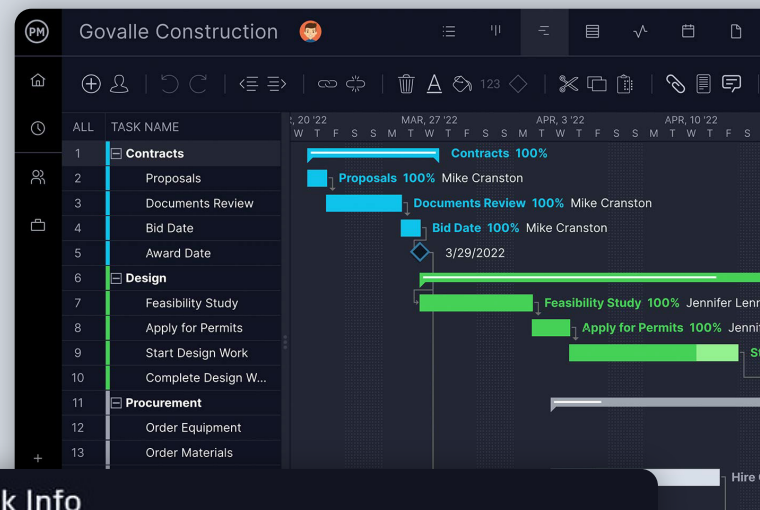


Gantt

Project managers love our Gantt chart as it allows them to make time-based plans and schedules. Our Gantt is one of our most widely used features because it acts as both a visual and data-driven tool to plan and organize projects in one place.

Use the Gantt view to:

- ✓ Navigate complex, long-term projects with tons of data
- ✓ Coordinate team schedules
- ✓ Import project plans from tools such as Excel and Microsoft Project



Task Info

GENERAL LINKS PEOPLE DEPENDENCIES

Name: Percentage complete

Planned Start: Due:

Actual Start: Finish:

Baseline Start: Finish:

Project Dashboard

Our Dashboard provides a place for six different widgets including health, tasks, progress, time, cost and workload.

Use the Dashboard to:

- ✓ Track critical information about your project in one place
- ✓ Spot issues within the project before they snowball
- ✓ Compare actual vs. planned data to see if your plan is on track



Portfolio Dashboard

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Our Portfolio Dashboard shows status updates across your entire portfolio as opposed to only one project. Create filters for your Portfolio Dashboard to see exactly the data you need.

The Dashboard can help you:

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

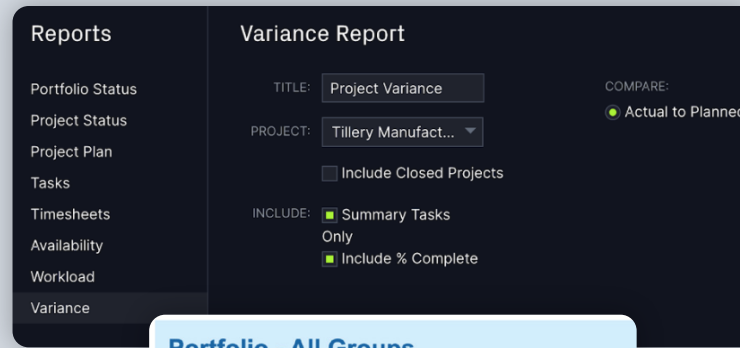


Reports

The Reports view offers one-click status reports, task reports, workload reports and more. Create customized reports to see exactly what you need.

Utilize Reports to:

- ✓ See the health of your entire project portfolio and manage project risk
- ✓ Preview reports that you send to key project stakeholders
- ✓ Keep an eye on project budgets and timelines



Portfolio - All Groups

on 19 April 2024 EDT

Project Name	Time	Workload
Marketing Solutions		
Mueller Square Construction		
PLATO		
Tillery Marketing		

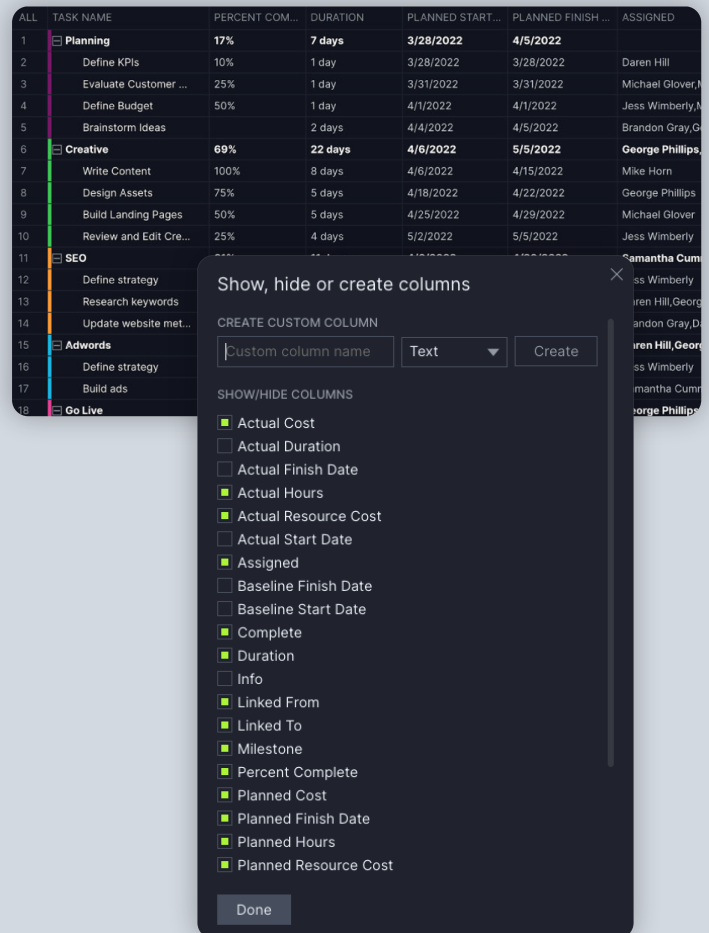
Project Name	Project Short Name	Project Manager
Marketing Solutions	Marketi	Daryl Mathers
Mueller Square Construction	Mueller	Damon Marshall
PLATO	PLATO	Janet Ohdera
Tillery Marketing	Tillery	Daryl Mathers

Sheet

The Sheet view is an online collaborative spreadsheet that focuses on the data. Feel free to set up the Gantt chart one way and the Sheet another way without impacting the data, as each experience is unique.

Utilize the Sheet view to:

- ✓ Create custom columns to track exactly what you need to
- ✓ Oversee resource details such as project expenses, team workload and more
- ✓ Share filtered project data with key stakeholders

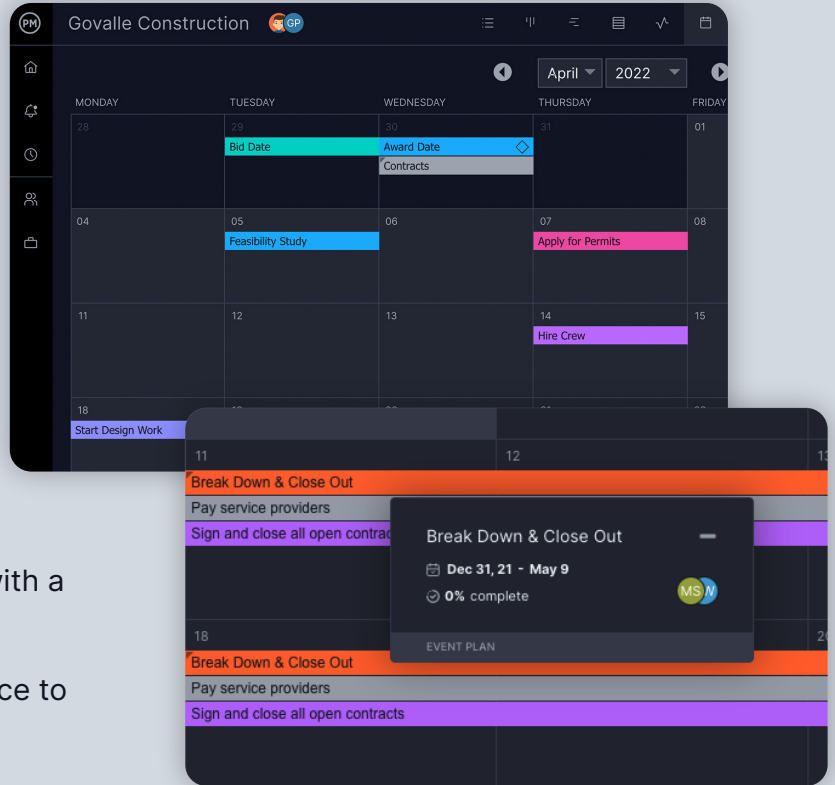


Calendar

Everyone knows the power of a well-kept calendar. Use it to track your work in a familiar setting. Quickly build schedules, and drag and drop tasks when due dates change.

Use the Calendar to:

- ✓ Develop content calendars
- ✓ Track a whole department's activities with a shared calendar
- ✓ See key dates and milestones at a glance to measure how projects are progressing

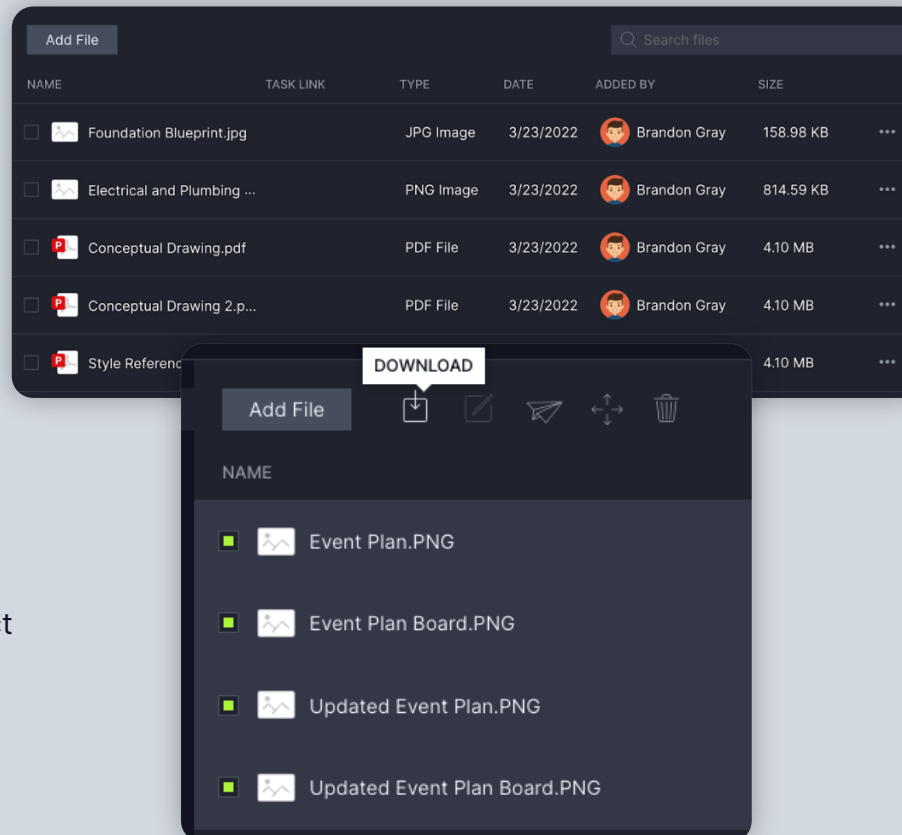


Files

Our Files section allows team members to see all project-related files in one place. Upload Word documents, screenshots, zip files, JPGs or PNGs to any given project in a few clicks.

The Files view is ideal to:

- ✓ Create and organize project files
- ✓ Search for a particular file within a project
- ✓ Keep certain project files confidential

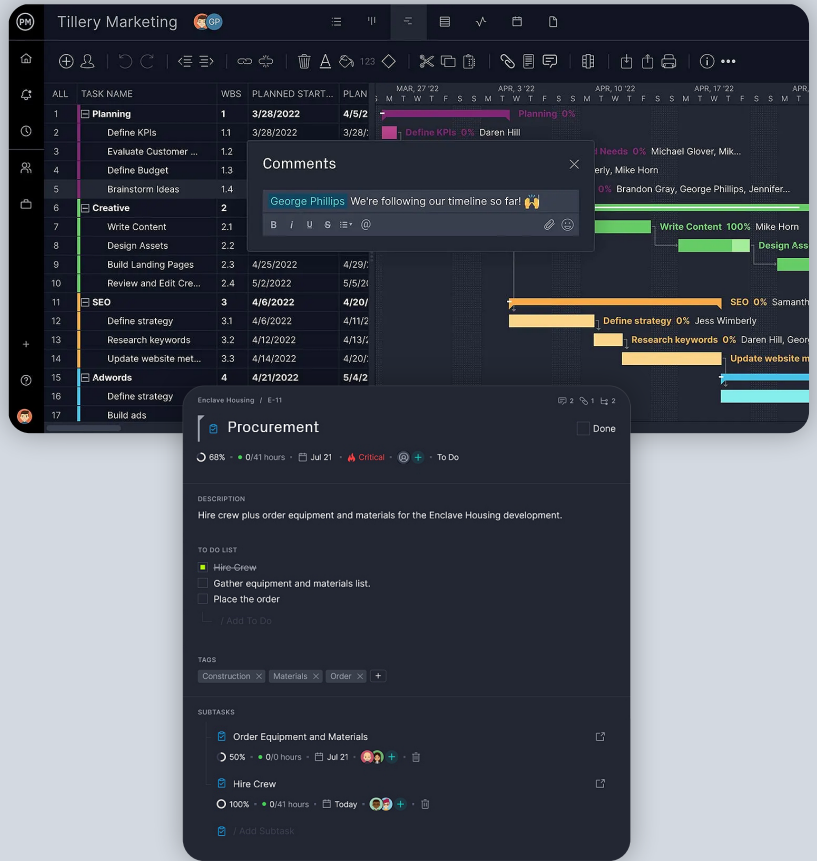


Collaboration

Whether you're looking for collective project feedback, need to house all feedback in one place or communicate across time zones, our collaboration features are essential to productivity.

Use our collaboration features to:

- ✔ Share files and attach them to specific tasks and projects
- ✔ Comment on tasks where everyone on the team can see it
- ✔ Leave an official communication trail for stakeholders to reference

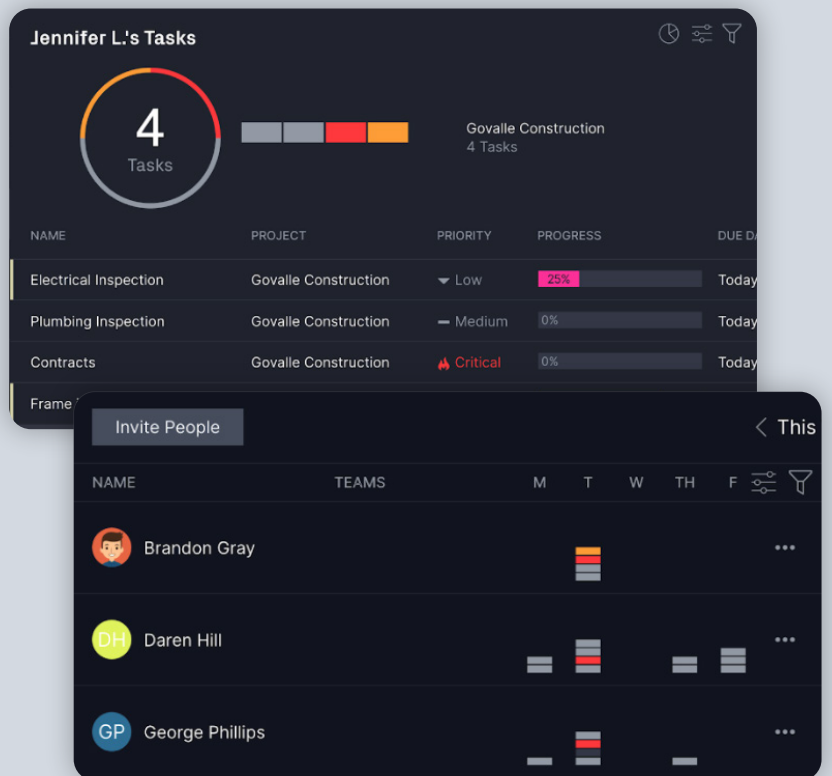


Team Page

The Team section allows you to see an overview of what team members are involved in what projects, including task breakdowns and task priority.

Use the Team view to:

- ✔ See an updated directory of who's on your team and what their workload is like
- ✔ Determine which team members can take on more work
- ✔ Identify team members who need help for greater productivity

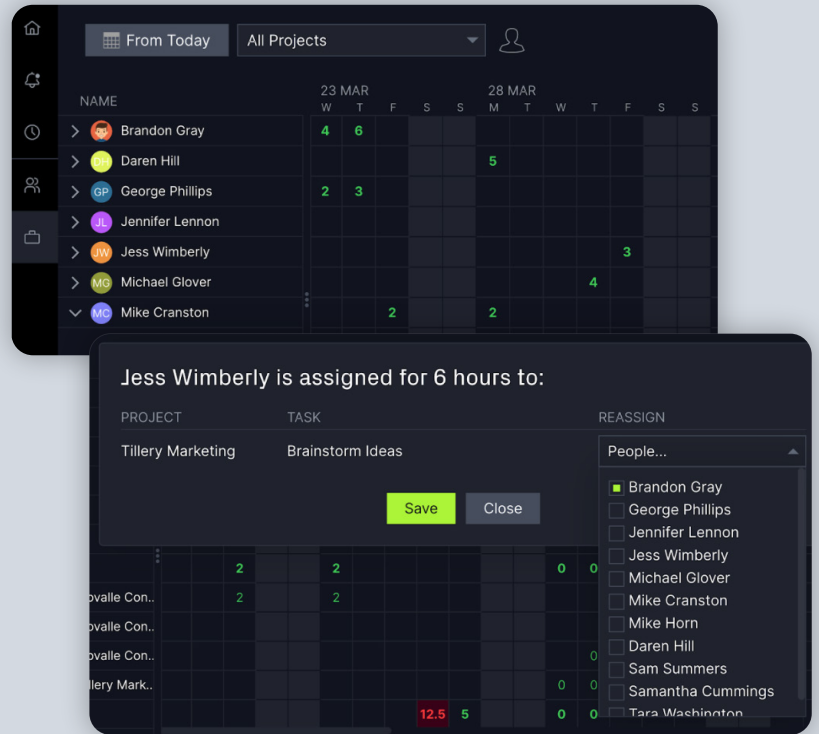


Workload BUSINESS & ENTERPRISE

The Workload view is the perfect spot to track project resources. Use this information to build resource plans and schedules for your team.

The Workload view is an ideal place to:

- ✓ See planned effort across your portfolio
- ✓ Task breakdowns by number of hours
- ✓ Reassign tasks and oversee resource management

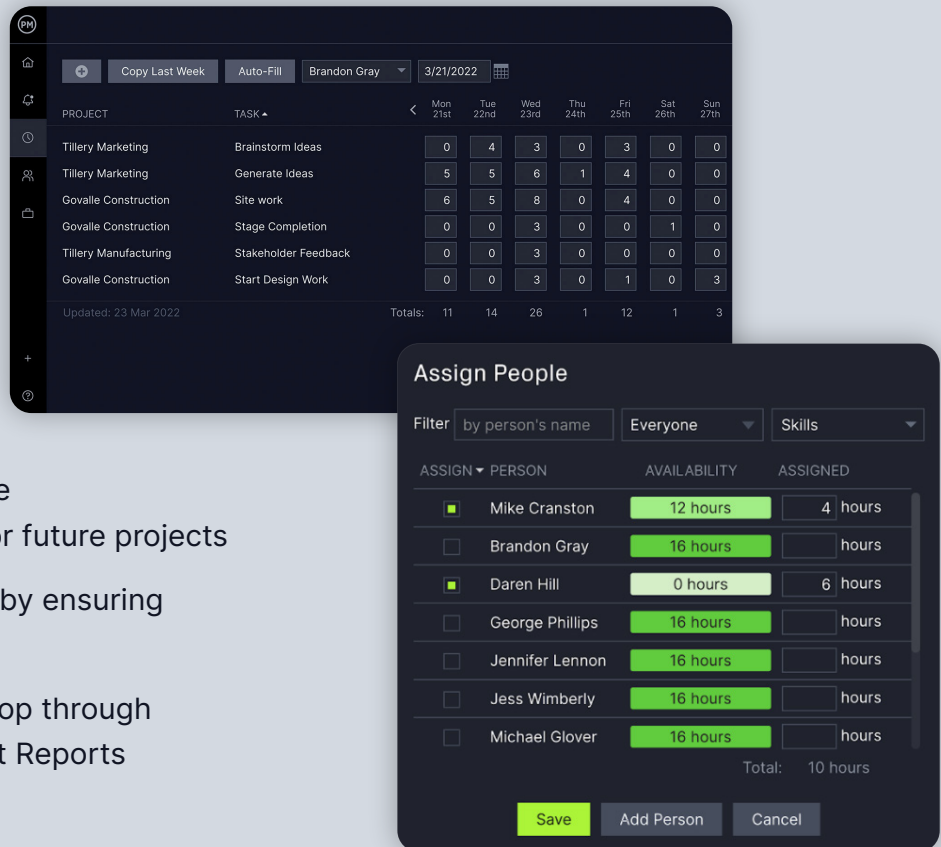


Timesheets BUSINESS & ENTERPRISE

Timesheets help our users keep track of their most valuable resource — time. Easily scroll through previous timesheets to understand how your project time is being spent.

Teams use Timesheets to:

- ✓ Review timesheets to determine patterns and predict the time for future projects
- ✓ Keep remote teams productive by ensuring hours are logged accurately
- ✓ Keep key stakeholders in the loop through customized data and Timesheet Reports



Portfolio Projects

See the status of all of your projects on the Portfolio Summary view. Users can see data across their projects in one digestible location.

The Portfolio Summary is an ideal view to:

- ✓ See how your projects are evolving at a high level
- ✓ See the progress across all of your projects in one place
- ✓ Keep track of costs and budgets across your portfolio



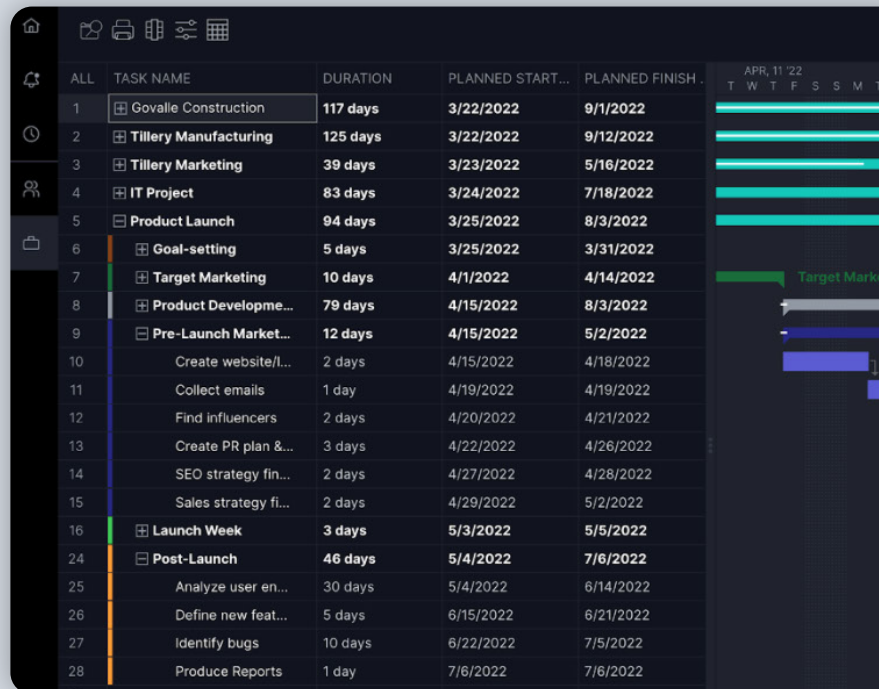
Roadmap

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Need to see all your projects on a single timeline? Turn to the Roadmap to track high-level information such as start and finish dates, project duration and planned versus actual effort, all in the familiar Gantt view.

Use the Roadmap to:

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



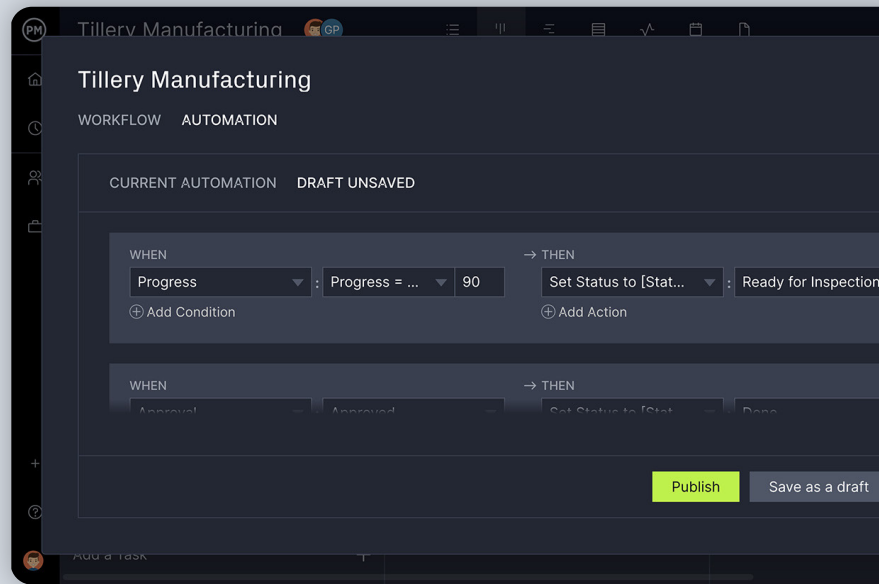
Workflow Automation

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Create customizable rules for workflows, automation and approvals to accelerate your projects. No coding experience required.

Use Workflow Automation to:

- ✓ Set custom triggers and actions to move tasks through various stages
- ✓ Build workflows once and use them to stay productive
- ✓ Set task approvers to maintain quality



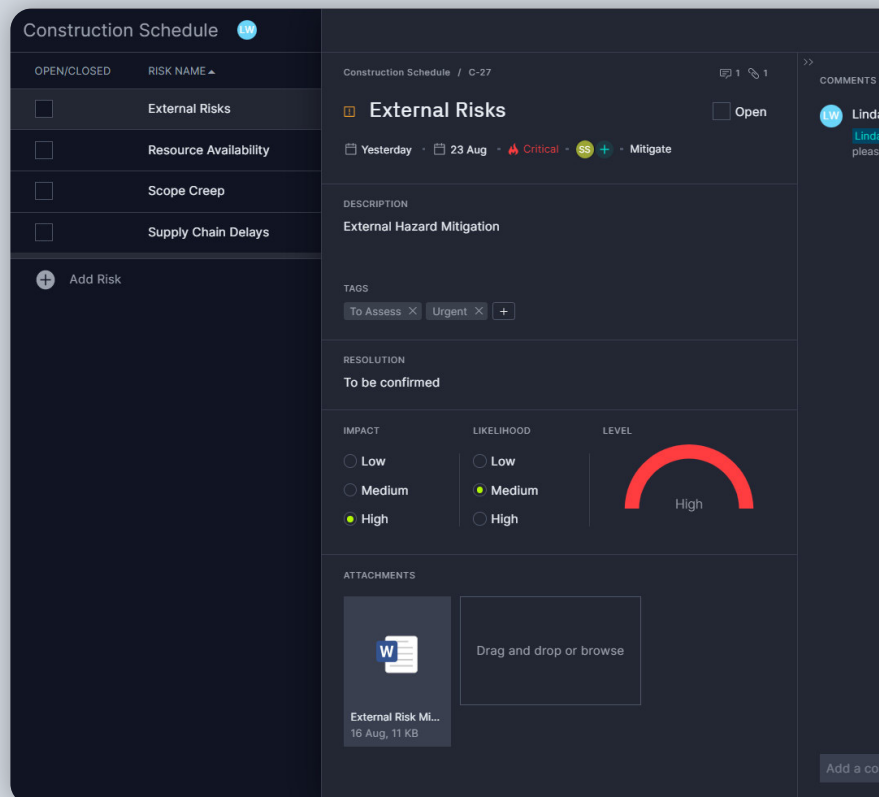
Risk Management

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Manage risks within your project and make sure the right parties stay informed. Leverage the built-in risk matrix for easy analysis.

Use the Risk view to:

- ✓ Manage a risk log
- ✓ Calculate risk probabilities and impacts
- ✓ Assign risks to team members and collaborate on solutions



Over 35,000 happy customers



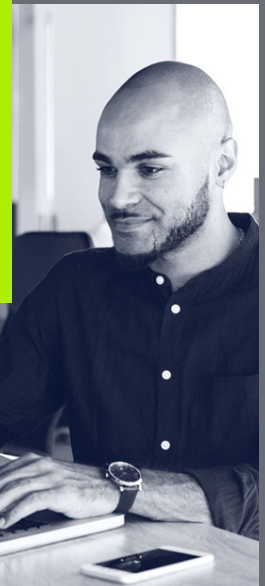
“The openness of ProjectManager empowers our team to build the tool they need to solve the problems they have and communicate within the team freely and easily. The software helps us deliver to our customers’ objectives on time, budget and to the requisite quality.”

·:·:CatSci

Dan Smith

Head of Portfolio at CatSci

“We were using Excel. That wasn’t ideal for us. Now, all the information is on the ProjectManager platform. We can save money because we can monitor our costs and track projects in real time.”



Santiago Lasso

PMO and Consulting Director at TEC360

Join the ProjectManager community

For more resources and helpful tips, visit our product videos page. If you have further questions about pricing, plans, use cases or our product in general, visit www.projectmanager.com/contact or feel free to email us at support@projectmanager.com.

Finally, stay connected with our ProjectManager community by following us on social media!

