

# ChamberMaster/MemberZone Working with Projects/Tasks

# Agenda

- Overview of Projects/Tasks
- Setting up Project Templates
- Setting up a Project
  - From Tasks
  - From Members
  - From Events
- Using Project Templates
- Monitoring/Updating Tasks
  - Tasks Summary
  - Task Calendar



# Overview

ChamberMaster/MemberZone's Project/Tasks Module is an easy to use project management tool to support your organization's:

- Membership Acquisition
- Member On-boarding
- Event Planning
- The possibilities are endless....

# Overview

Using Project/Task Manager will give you the ability to:

- Assign projects and tasks to your staff members
- Track their progress with a “percentage complete” value
- Set deadlines for projects and tasks
- Keep an eye on the “big picture” with the Summary and Task Calendar pages
- Create templates for recurring projects like bringing on a new member

# Setting up a Project Template

## Why use project templates?

- Save Time
- Save Money
- Avoid Mistakes
- Adaptability

**Projects/Tasks Beta**

Summary Task Calendar Projects Tasks Templates

Templates New Template

Category	Name	Tasks	Actions
General	<a href="#">Event Planning Template</a>	0	✖
Member	<a href="#">Member Acquisition Template</a>	0	✖
General	<a href="#">Member On-boarding Template</a>	0	✖

# Setting up a Project Template

- WIKI: [Create a Project Template](#)

[Summary](#)
[Task Calendar](#)
[Projects](#)
[Tasks](#)
[Templates](#)

Summary

Task Calendar

Projects

Tasks

Templates

Category

Name

Tasks

Actions

Type

Q

Type to search...

Q

Type

Q

Event	<a href="#">Event Planning Template</a>	0	✖
Member	<a href="#">Member Acquisition Template</a>	0	✖
Member	<a href="#">Member On-boarding Template</a>	6	

New Template

Add/Edit Template

Project Category

General

Name

Template Name (required)

Description

Task List

Task Name	Task Type	Assign To	Target Dates	Actions
<a href="#">Add Task</a>				

Cancel

Done

# Setting up a Project Template

## Adding Tasks

- **Children must be completed first:** If this task is a parent task, select this option if all child tasks must be marked as completed prior to this task being marked as completed
- **Start & End Dates** – As this is a template, you do not enter specific dates, due dates will be “calculated” when the template is used
- **Type** - Types are used for sorting on the tasks screen and on the **Task Calendar**.

Template Task Add/Edit

☐ Children must be completed first.

Task Name

Description

Start

3

Days

after

project end date

End

3

Days

after

project end date

Assigned To

Type

Optional Type

[Edit](#)

Priority

Normal

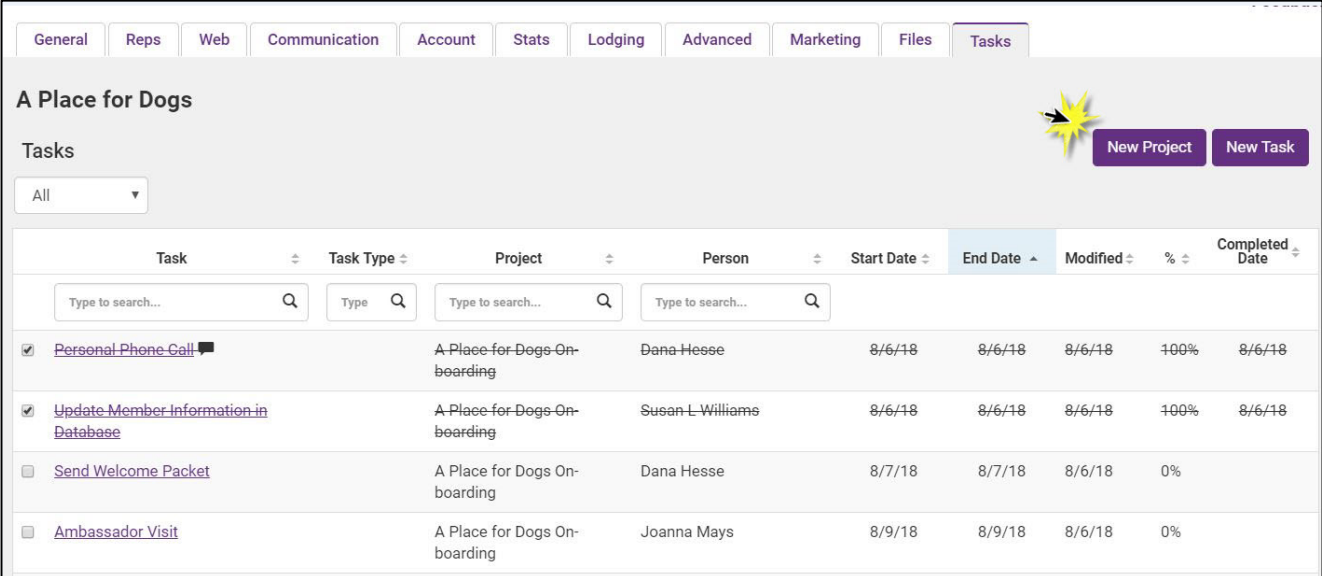
Cancel

Done

# Using Project Templates

A project template may be used:

- From the Projects/Task Module
- When Creating an Event
- From a Member's Tasks tab



The screenshot shows the 'Tasks' tab in the 'A Place for Dogs' project. It includes a 'New Task' button and a table of tasks with columns for Task, Task Type, Project, Person, Start Date, End Date, Modified, %, and Completed Date.

Task	Task Type	Project	Person	Start Date	End Date	Modified	%	Completed Date
<input checked="" type="checkbox"/> <a href="#">Personal Phone Call</a>		A Place for Dogs On-boarding	Dana Hesse	8/6/18	8/6/18	8/6/18	100%	8/6/18
<input checked="" type="checkbox"/> <a href="#">Update Member Information in Database</a>		A Place for Dogs On-boarding	Susan L Williams	8/6/18	8/6/18	8/6/18	100%	8/6/18
<input type="checkbox"/> <a href="#">Send Welcome Packet</a>		A Place for Dogs On-boarding	Dana Hesse	8/7/18	8/7/18	8/6/18	0%	
<input type="checkbox"/> <a href="#">Ambassador Visit</a>		A Place for Dogs On-boarding	Joanna Mays	8/9/18	8/9/18	8/6/18	0%	



# Create a New Project

For one-time projects, or to select an existing template – new projects are created

WIKI: [Create a New Project](#)

Projects

All

New Project

Project	Category	Owner	Start Date	End Date	Total Tasks	Completed Tasks	Remaining Tasks	% Complete	Actions
<a href="#">The Fish House On-boarding</a>	General	<a href="#">Dana Hesse</a>	7/19/18	8/11/18	11	2	9	18.182%	
<a href="#">A Place for Dogs On-boarding</a>	Member	<a href="#">Greg Lansonne</a>	8/6/18	8/17/18	0	0	0	0%	
<a href="#">Member Recruitment - The Knit Shop</a>	General	<a href="#">Dana Hesse</a>		8/31/18	0	0	0	0%	
<a href="#">A Place for Dogs On-boarding</a>	Member	<a href="#">Dana Hesse</a>	8/6/18	8/31/18	0	0	0	0%	
<a href="#">A Place for Dogs On-boarding</a>	Member	<a href="#">Greg Lansonne</a>	8/6/18	9/27/18	6	2	4	33.333%	

Add Project

Category

General

Template

Project Name

Project Name (required)

Project name is required.

Start Date

End Date

End Date (required)

Project Owner

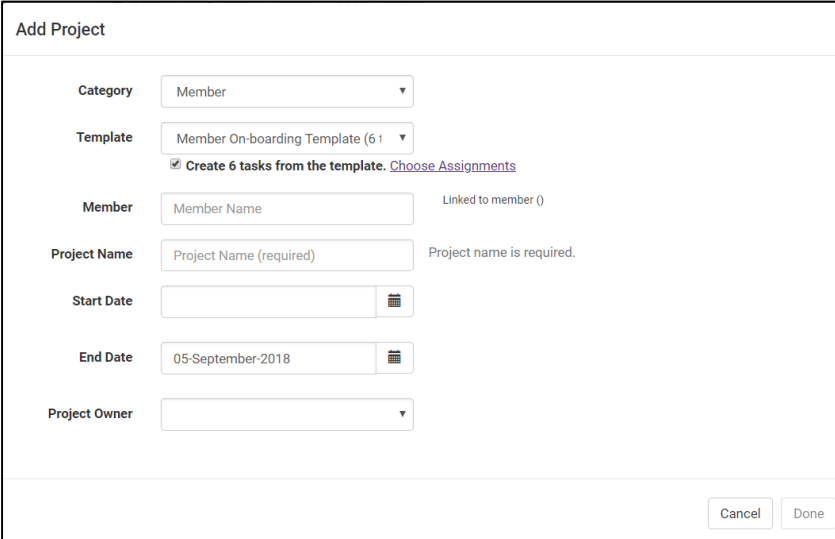
Cancel

Done

# Create a New Project

When creating a New Project from a Template – to include the tasks:

- Click **Create X tasks from the template**
- Click **Choose Assignments** to view tasks, and assign tasks to your staff



The screenshot shows a web form titled "Add Project". It contains several input fields and a checkbox. The "Category" dropdown is set to "Member". The "Template" dropdown is set to "Member On-boarding Template (6 1)". Below the template dropdown, there is a checkbox labeled "Create 6 tasks from the template." which is checked, followed by a link "Choose Assignments". The "Member" field contains "Member Name" with a note "Linked to member ()". The "Project Name" field contains "Project Name (required)" with a note "Project name is required.". The "Start Date" field is empty with a calendar icon. The "End Date" field contains "05-September-2018" with a calendar icon. The "Project Owner" dropdown is empty. At the bottom right, there are "Cancel" and "Done" buttons.

Category	Member
Template	Member On-boarding Template (6 1)
<input checked="" type="checkbox"/> Create 6 tasks from the template. <a href="#">Choose Assignments</a>	
Member	Member Name
Project Name	Project Name (required)
Start Date	
End Date	05-September-2018
Project Owner	

# Create a New Project

Add Project

Category
Member

Template
Member On-boarding Template (61)

☒ Create 6 tasks from the template. [Choose Assignments](#)

Member
Member Name
Linked to member ()

Project Name
Project Name (required)
Project name is required.

Start Date

End Date
05-September-2018

Project Owner

Cancel Done

Task Assignments

Below is listed the individual tasks, you can assign the person for each task individually.

Send Welcome Packet

Personal Phone Call

Ambassador Visit

Invite to New Member Luncheon

Update Member Information in Database

New Member Announcement

[use template assignments](#)

Done

# Create Project for Event

On the Tasks tab for an event, you can create a project (from scratch or from a template) **OR** you can simply add tasks without creating a project.

Events

Feedback?

Calendar

General

Fees

Sponsors

Advanced

Guest List

Account

Files

Tasks

Ye Old BBQ

Tasks

All

New Project

New Task

Task

Task Type

Project

Person

Start Date

End Date

Modified

%

Completed Date

Type to search...

Type to search...

Type to search...

Type to search...

Add Project

Category

Event

Template

Event

Ye Old BBQ 8/17/18

Linked to event (13)

Project Name

Project Name (required)

Project name is required.

Start Date

End Date

End Date (required)

Project Owner

Cancel

Done

# Create Project for Member

Projects can be used for member acquisition, new member on-boarding, etc.

A project may be created from scratch or by using a template on the member's task tab

Members

Feedback?

General

Reps

Web

Communication

Account

Stats

Lodging

Advanced

Marketing

Files

Tasks

Antiques on Main

Tasks

All

New Project

New Task

Task	Task Type	Project	Person	Start Date	End Date	Modified	%	Completed Date
Type to search...	Type to search...	Type to search...	Type to search...					

Add Project

Category

Member

Template

Member

Antiques on Main

Linked to member (37)

Project Name

Project Name (required)

Project name is required.

Start Date

End Date

End Date (required)

Project Owner

Cancel

Done

# Updating Tasks

To monitor & manage tasks, you can mark progress completion, add comments & add files to tasks

WIKI: [Updating/Completing Tasks](#)

Task Add/Edit

General

Comments (2)

Files (1)

☐ Completed  
or % complete 0 %

Task Name

Project

A Place for Dogs On-boarding

Parent Task

Parent Task (optional)

Description

Start Date

06-August-2018

Advanced options

End Date

06-August-2018

Set To Start Date

Advanced options

Assigned To

TRN11 TRN11

Type

Optional Type

Edit

Priority

Normal

Delete

Cancel

Done

# Monitoring Tasks/Project Completion

The Summary tab in the Project/Tasks module provides a view of all projects/tasks

WIKI: [Monitoring Tasks/Project Completion](#)

**Projects/Tasks**
Beta

[Summary](#)
[Task Calendar](#)
[Projects](#)
[Tasks](#)
[Templates](#)

BETA version! We've still got more work to do before this project/task manager is the way we would like it to be but this beta version does provide basic project/task management so we don't want to keep you from using it if it provides the foundational functions that you might need. [Tips on using it..](#) [Show/Hide](#)

**Task Summary by Person (8)**

Person	Open	Overdue	Recently Completed
<a href="#">Joe Ambassador</a>	1	1	0
<a href="#">Dana Hesse</a>	2	2	1
<a href="#">Joanna Mays</a>	3	1	0
<a href="#">Greg Lansonne</a>	4	4	1
<a href="#">Harold Landon</a>	1	0	0
<a href="#">Susan L. Williams</a>	0	0	1
<a href="#">TRN11 TRN11</a>	1	1	0
<a href="#">Cheri Petterson</a>	1	1	0

**Projects with Open Items (2)**

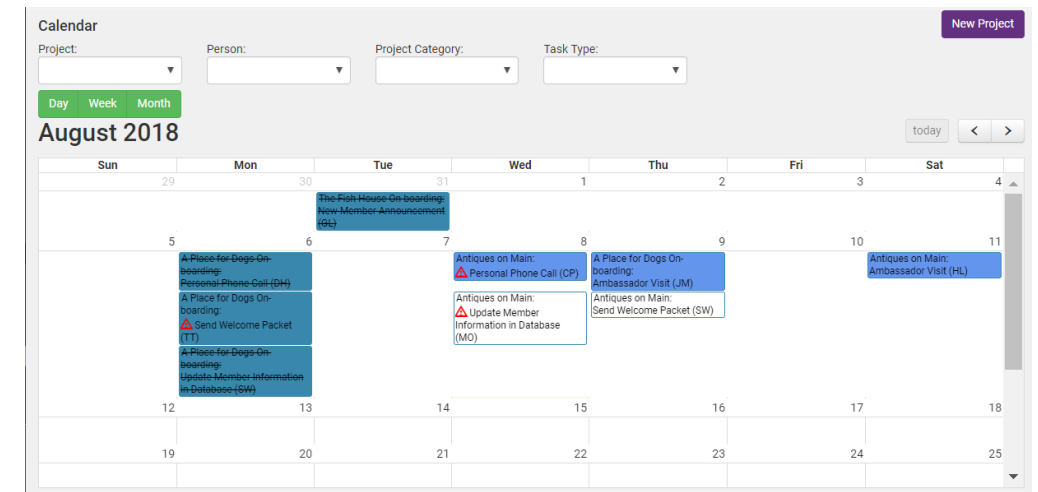
Project	End Date	Open Tasks
<a href="#">A Place for Dogs On-boarding</a>	9/27/18	4
<a href="#">The Fish House On-boarding</a>	8/11/18	9

# Tasks Calendar

An alternate view of all of your tasks is available on the **Task Calendar** tab

Color-coding of tasks makes it easy for you to identify the types of tasks

WIKI: [Working with Task Calendar](#)





# Questions?

See future training opportunities: [ChamberMaster/MemberZone Training](#)