

Managing Your Projects



Agenda

- ☐ Overview
- ☐ Creating a Project
- ☐ Monitoring Projects
- ☐ Project Management Reports



PROJECT MANAGEMENT

Manage all projects from one location and track according to individual, organization, membership, and event.

Overview

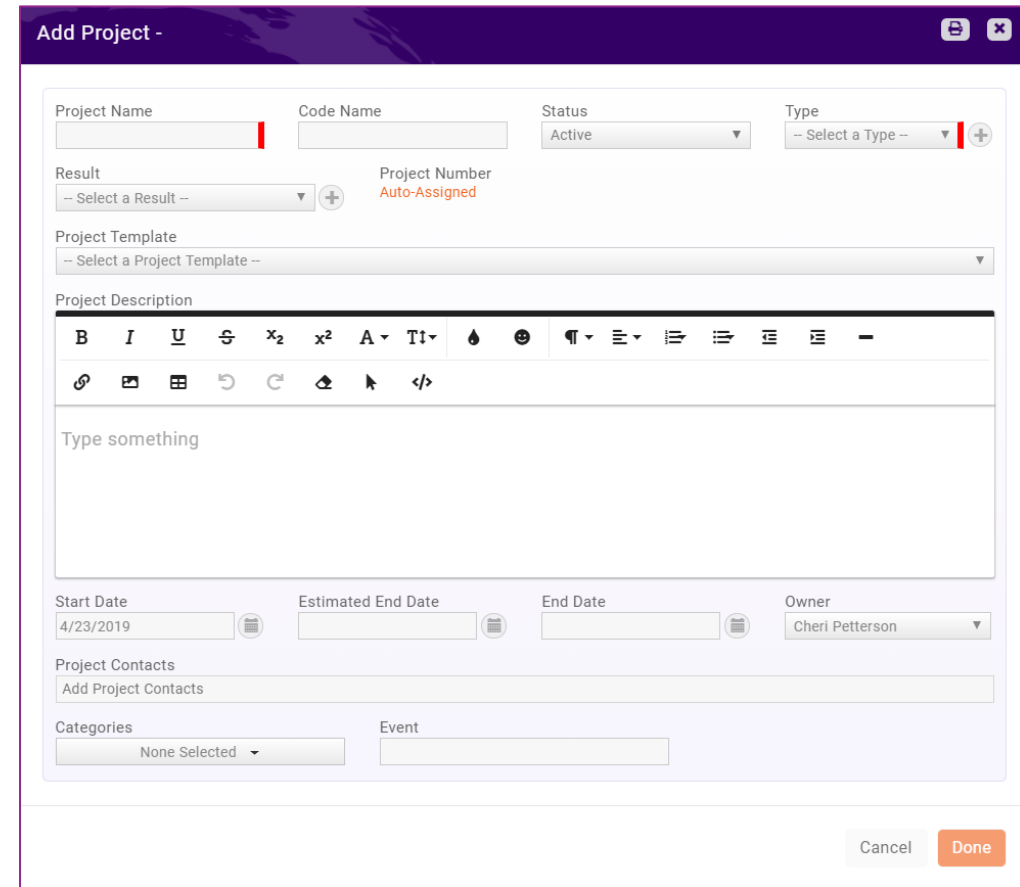
The GrowthZone Project Management module will help you to organize and manage projects from beginning to end

The module can be used to manage your member acquisition, member on-boarding, events, and more. If you have projects that are repeatable (such as member on-boarding) you can create a project template to be re-used, saving you time

Create a New Project

When creating a project, you may either create a project from scratch, or you may use a template.

KB: Create a New Project



The screenshot shows the 'Add Project' form in the GrowthZone software. The form is titled 'Add Project -' and includes the following fields and sections:

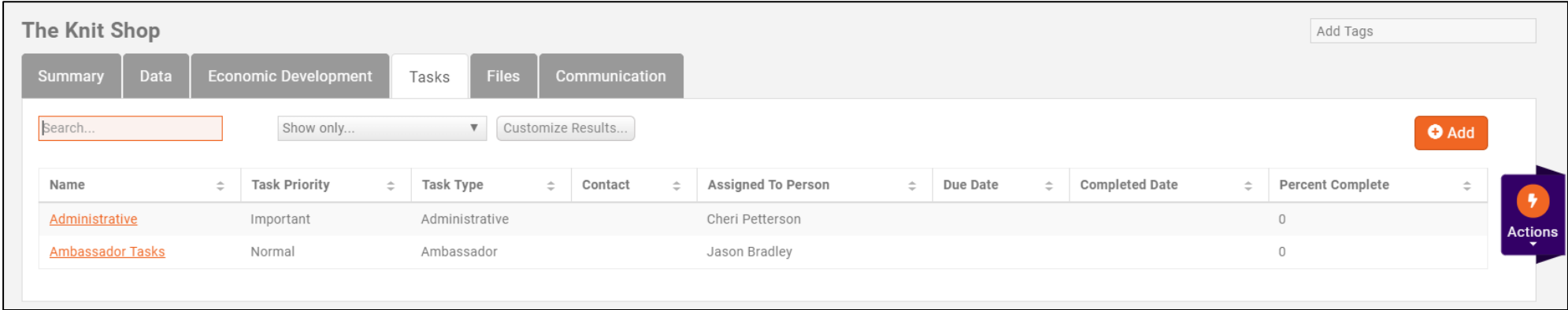
- Project Name:** A text input field.
- Code Name:** A text input field.
- Status:** A dropdown menu with 'Active' selected.
- Type:** A dropdown menu with '-- Select a Type --' and a plus icon.
- Result:** A dropdown menu with '-- Select a Result --' and a plus icon.
- Project Number:** A text input field with the value 'Auto-Assigned'.
- Project Template:** A dropdown menu with '-- Select a Project Template --'.
- Project Description:** A rich text editor with a toolbar containing various formatting options (bold, italic, underline, link, unlink, list, etc.) and a text area with the placeholder 'Type something'.
- Start Date:** A date input field with the value '4/23/2019'.
- Estimated End Date:** A date input field.
- End Date:** A date input field.
- Owner:** A dropdown menu with 'Cheri Petterson' selected.
- Project Contacts:** A section with a text input field labeled 'Add Project Contacts'.
- Categories:** A dropdown menu with 'None Selected'.
- Event:** A text input field.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Done'.

Monitoring & Updating Projects

Project Monitoring refers to the process of keeping track of all project-related metrics including team performance and task duration, identifying potential problems and taking corrective actions necessary to ensure that the project is within scope and meets the specified deadlines.

KB: Monitoring & Updating Projects



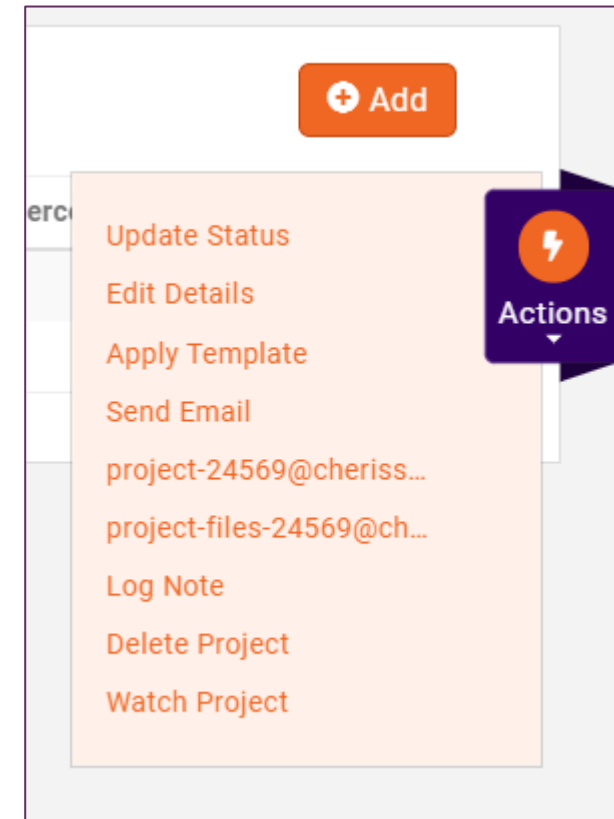
The screenshot displays the 'The Knit Shop' project management interface. At the top, there are tabs for 'Summary', 'Data', 'Economic Development', 'Tasks', 'Files', and 'Communication'. Below the tabs, there is a search bar, a 'Show only...' dropdown, and a 'Customize Results...' button. An 'Add' button is located on the right. The main area contains a table with the following columns: Name, Task Priority, Task Type, Contact, Assigned To Person, Due Date, Completed Date, and Percent Complete. The table lists two tasks: 'Administrative' (Important priority, Assigned to Cheri Petterson) and 'Ambassador Tasks' (Normal priority, Assigned to Jason Bradley). An 'Actions' button is visible on the right side of the table.

Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
Administrative	Important	Administrative		Cheri Petterson			0
Ambassador Tasks	Normal	Ambassador		Jason Bradley			0

Monitoring & Updating Projects

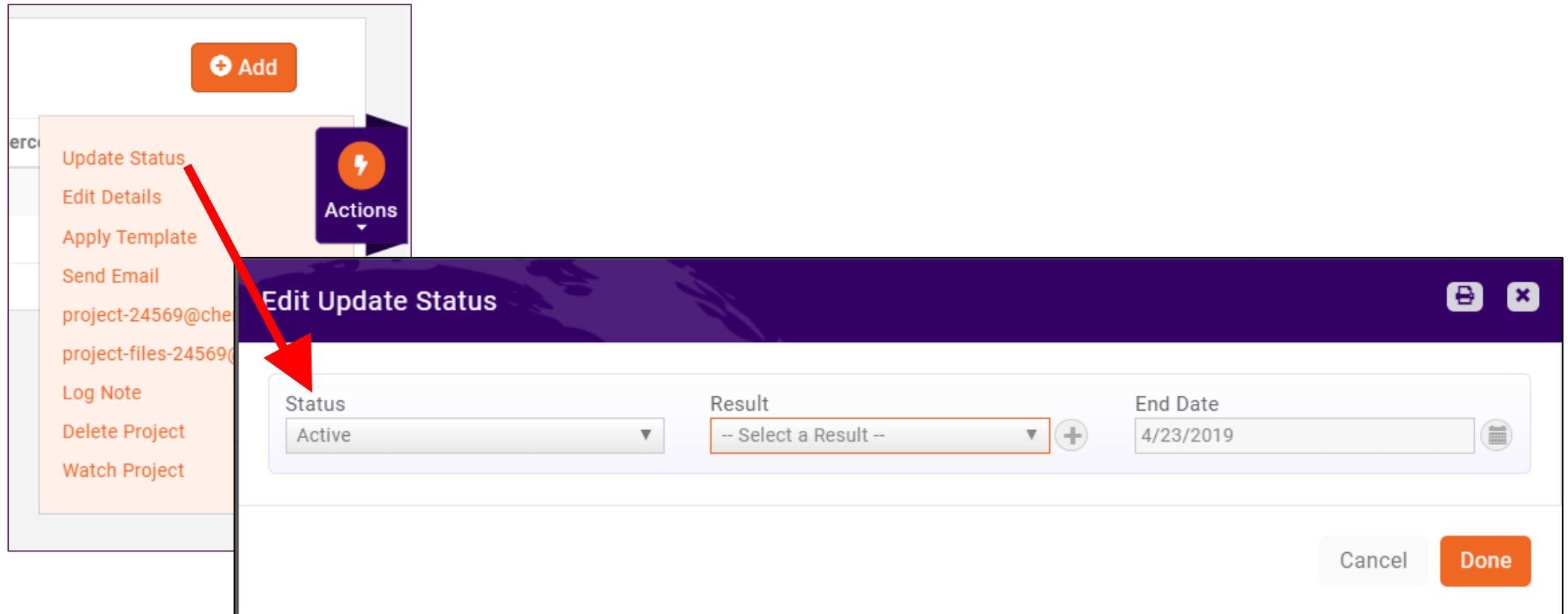
Watch your projects...Staff may watch a project, and be sent notifications when:

- ❑ A project they are watching is completed
- ❑ When a task is completed for a project they are watching



Monitoring & Updating Projects

KB: Update the Status of a Project

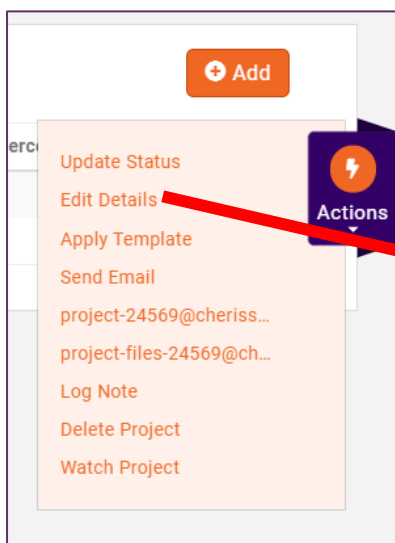


The screenshot displays the GrowthZone software interface. On the left, a vertical sidebar contains an 'Add' button and an 'Actions' menu. The 'Actions' menu is open, showing a list of options: 'Update Status', 'Edit Details', 'Apply Template', 'Send Email', 'project-24569@che', 'project-files-24569', 'Log Note', 'Delete Project', and 'Watch Project'. A red arrow points from the 'Update Status' option to the 'Edit Update Status' dialog box. The dialog box has a dark purple header with the title 'Edit Update Status' and icons for print and close. The main content area of the dialog box contains three fields: 'Status' with a dropdown menu showing 'Active', 'Result' with a dropdown menu showing '-- Select a Result --', and 'End Date' with a text input field showing '4/23/2019'. There are plus and minus icons between the 'Result' and 'End Date' fields. At the bottom right of the dialog box are 'Cancel' and 'Done' buttons.

Monitoring & Updating Projects

When change is necessary, you can edit project details, such as the description, type, contacts, etc.

KB: Edit Project Details

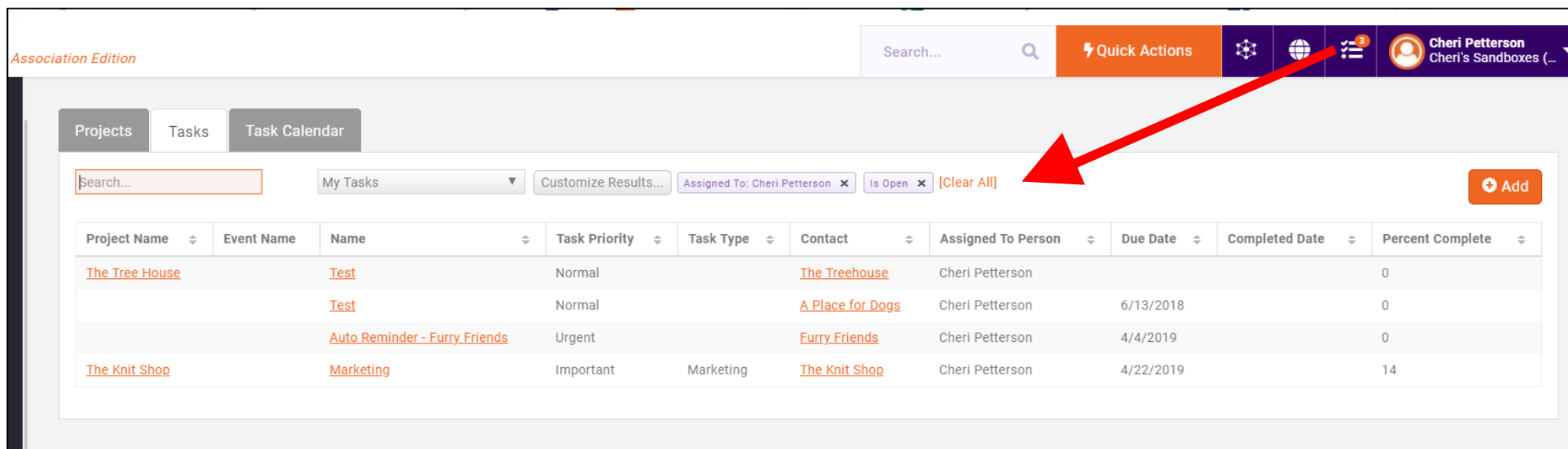


A screenshot of the 'Edit Project - The Knit Shop' form. The form has a purple header bar with the title 'Edit Project - The Knit Shop' and a close button. The form contains several fields and sections:

- Project Name:** The Knit Shop
- Code Name:** (empty)
- Status:** Active (dropdown)
- Type:** Member (dropdown)
- Result:** -- Select a Result -- (dropdown)
- Project Number:** 19-03-0002
- Project Description:** A rich text editor with a toolbar containing various formatting options (bold, italic, underline, link, unlink, list, etc.). The description text is 'Template to be used for Member On-Boarding'.
- Custom Fields:** A table with columns: Object Type, Display Name, Field Data Type, Group Name, Archived, and Actions. The table is currently empty, showing 'None to display'.
- Start Date:** 3/6/2019
- Estimated End Date:** (empty)
- End Date:** (empty)
- Owner:** Joan Anderson (dropdown)

Monitoring & Updating Projects

The **Task List** icon in the header bar will notify to a staff member that they have tasks that need attention



The screenshot displays the GrowthZone software interface. The header bar includes a search field, a 'Quick Actions' button, and a 'Task List' icon (a list with a red notification badge) which is highlighted by a red arrow. Below the header, the 'Tasks' tab is selected. The task list shows four tasks assigned to Cheri Petterson. The tasks are: 'The Tree House' (Normal priority, 0% complete), 'Test' (Normal priority, 0% complete), 'Auto Reminder - Furry Friends' (Urgent priority, 0% complete), and 'The Knit Shop' (Important priority, 14% complete). The 'Task List' icon in the header bar is the one that notifies staff members of tasks needing attention.

Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
The Tree House		Test	Normal		The Treehouse	Cheri Petterson			0
		Test	Normal		A Place for Dogs	Cheri Petterson	6/13/2018		0
		Auto Reminder - Furry Friends	Urgent		Furry Friends	Cheri Petterson	4/4/2019		0
The Knit Shop		Marketing	Important	Marketing	The Knit Shop	Cheri Petterson	4/22/2019		14

Monitoring/Updating Individual Tasks

Once tasks have been assigned, the staff person to whom the task has been assigned will be sent an email notification and will be able to view and update task status

WIKI: Monitoring & Updating Individual Tasks

The screenshot displays the 'Task Management' interface in GrowthZone software. At the top, there are dropdown menus for 'Assigned To' (Cheri Petterson), 'Task Name' (Marketing), 'Type' (Marketing), and 'Priority' (Important). Below these are fields for 'Project' (The Knit Shop) and 'Milestone' (a dropdown menu with a plus icon). The main section is 'Task Description', which includes a rich text editor with various formatting tools (bold, italic, underline, link, etc.) and a text area containing the placeholder 'Type something'. At the bottom, there is a 'Task Items' table with columns for 'Name', 'Is Complete', and 'Completed Date'.

Name	Is Complete	Completed Date
11 New Member Social Media Announcement	<input checked="" type="checkbox"/>	4/23/2019
11 Add Member to Newsletter Groups	<input type="checkbox"/>	
11 New Member Email - Engage	<input type="checkbox"/>	
11 New Member Email - Connect	<input type="checkbox"/>	
11 New Member Email - Advocate	<input type="checkbox"/>	
11 New Member Survey	<input type="checkbox"/>	
11 New Member Satisfaction Survey	<input type="checkbox"/>	

Project Reporting

Project Started by Quarter

The Project Started by Quarter report allows you to generate a list of all projects started in each quarter of a selected year

KB: Project Started by Quarter

[Back](#)

Run Report

Project Started by Quarter

Year
2019

Current Project Status
None Selected

Project Categories
None Selected

Additional Criteria / Filters
+

Display Options

Fields to Display
Q1, Q2, Q3, Q4, Total, Type

Summarize By
Add Summarize By

Display Mode
Detail

Results

Type	Q1	Q2	Q3	Q4	Total
Member	1	1	0	0	2
Count\Average\Totals	1	1	0	0	2

Project Reporting

Project Summary Report

The Project Summary Report allows you to generate a list of some or all projects along with the name of the project owner

KB: [Project Summary Report](#)

Results				
Project Name ↕	Project Owner ↕	Type ↕	Category ↕	Total Projects ↕
Chewy Chewy Onboarding	Julie Jones	Member		1
The Knit Shop	Joan Anderson	Member		1
The Tree House	Cheri Petterson			1
Count\Average\Totals	3			3

Project Reporting

Projects Report

The Projects Report can be used to analyze the status of your current project, for example, project that are past completion date

KB: [Projects Report](#)

Results							
Project Name ↕	Project Type ↕	Number ↕	Project Category ↕	Status ↕	Contact Name ↕	Default Email ↕	Default Phone ↕
Chewy Chewy Onboarding	Member	19-04-0003		Active			
The Knit Shop	Member	19-03-0002		Active	The Knit Shop		
The Tree House		18-08-0001		Active	The Treehouse		
Count	3						



Project Reporting

Task Report

The **Task Report** allows you to generate a list of all tasks. This report may be useful to identify open tasks, tasks assigned to specific staff members, incomplete tasks, and so on.

KB: Task Report

Results										
Project Name ↕	Project Type ↕	Task Name ↕	Task Description ↕	Priority ↕	Task Start Date ↕	Due Date ↕	Completed Date ↕	Estimated Hours ↕	Percent Complete ↕	Assigned To ↕
Chewy Chewy Onboarding	Member	Administrative DB Updates	Getting all needed information updated in the database	Important				2	0	Maggie Jones
Chewy Chewy Onboarding	Member	Ambassador Tasks		Important	4/26/2019	5/22/2019		10	0	Missy Frame
The Knit Shop	Member	Marketing		Important	4/1/2019	4/22/2019		0	14	Cheri Petterson
The Knit Shop	Member	Administrative		Important		4/2/2019	4/23/2019	0	100	Cheri Petterson
The Knit Shop	Member	Ambassador Tasks		Normal		4/12/2019		0	33	Danna Dewey
Count	5									



Questions?