

GrowthZone - Working with Projects/Tasks



- 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.

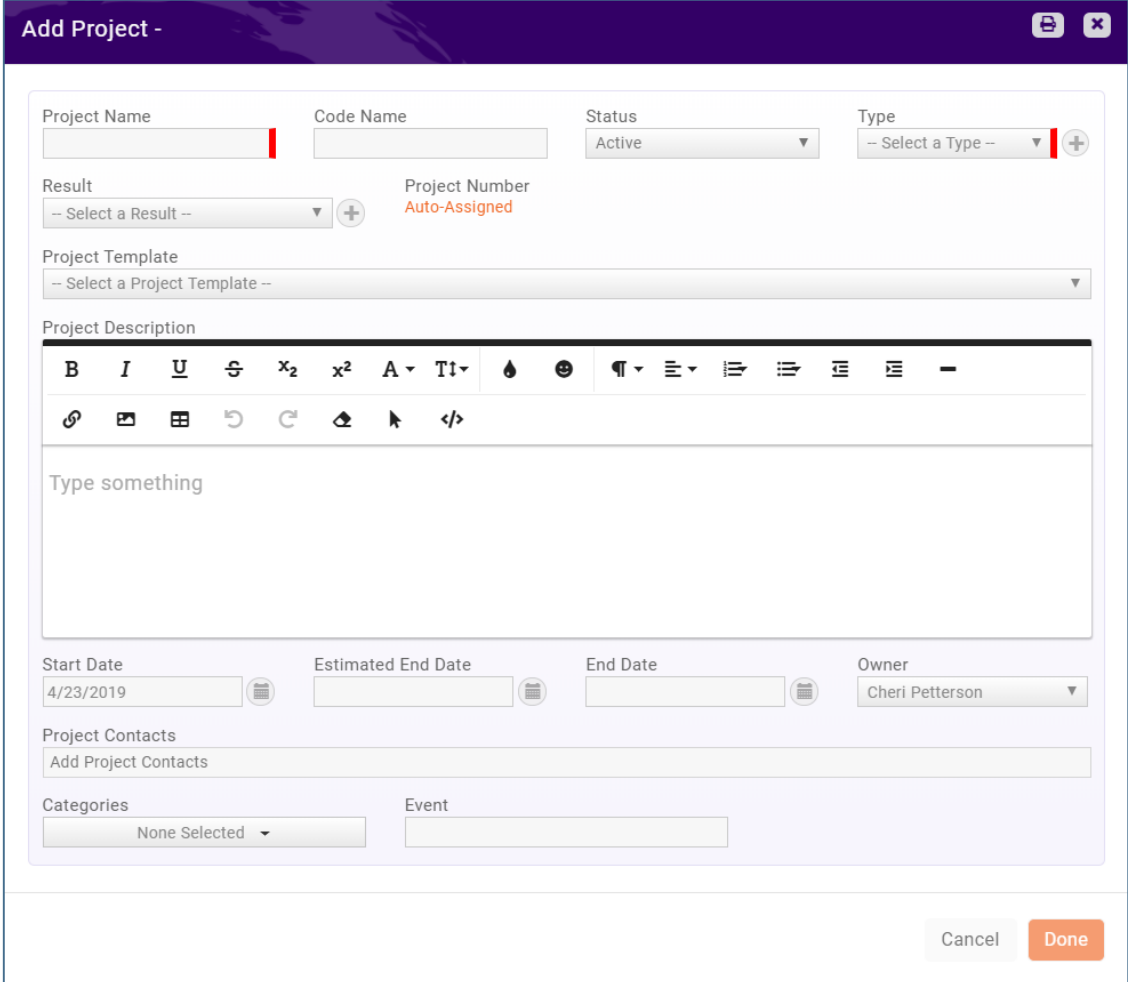
The GrowthZone Project Management module will help you to organize and manage projects from beginning to end

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.

WIKI: [Create a New Project](#)



The screenshot shows the 'Add Project' form with the following fields and options:

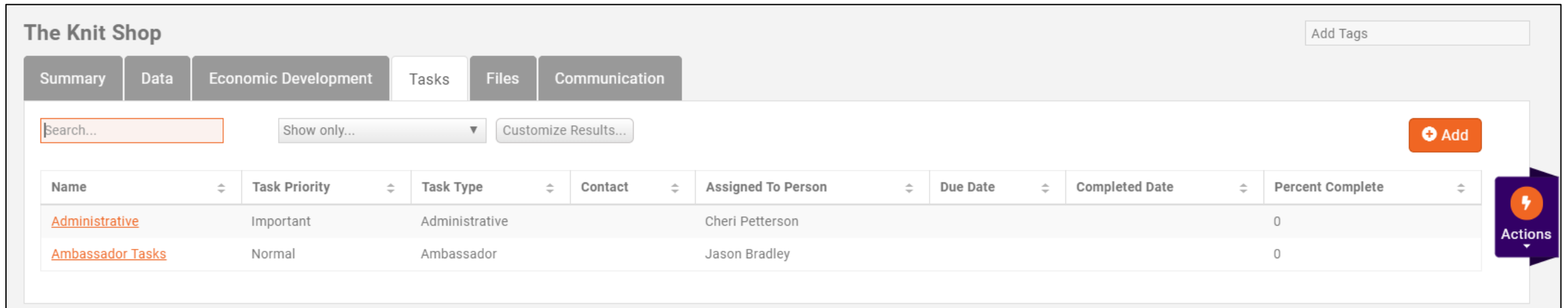
- Project Name:** Text input field.
- Code Name:** Text input field.
- Status:** Dropdown menu with 'Active' selected.
- Type:** Dropdown menu with '-- Select a Type --' selected.
- Result:** Dropdown menu with '-- Select a Result --' selected.
- Project Number:** Text input field with 'Auto-Assigned' displayed in red.
- Project Template:** Dropdown menu with '-- Select a Project Template --' selected.
- Project Description:** Rich text editor with a toolbar containing bold, italic, underline, link, unlink, list, and other icons. The text area contains the placeholder 'Type something'.
- Start Date:** Date picker with '4/23/2019' selected.
- Estimated End Date:** Date picker.
- End Date:** Date picker.
- Owner:** Dropdown menu with 'Cheri Petterson' selected.
- Project Contacts:** Text input field with 'Add Project Contacts' placeholder.
- Categories:** Dropdown menu with 'None Selected' selected.
- Event:** Text input field.

At the bottom right, there are 'Cancel' and 'Done' buttons.

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

WIKI: [Monitoring & Updating Projects](#)



The Knit Shop

Add Tags

Summary Data Economic Development **Tasks** Files Communication

Search... Show only... Customize Results... Add

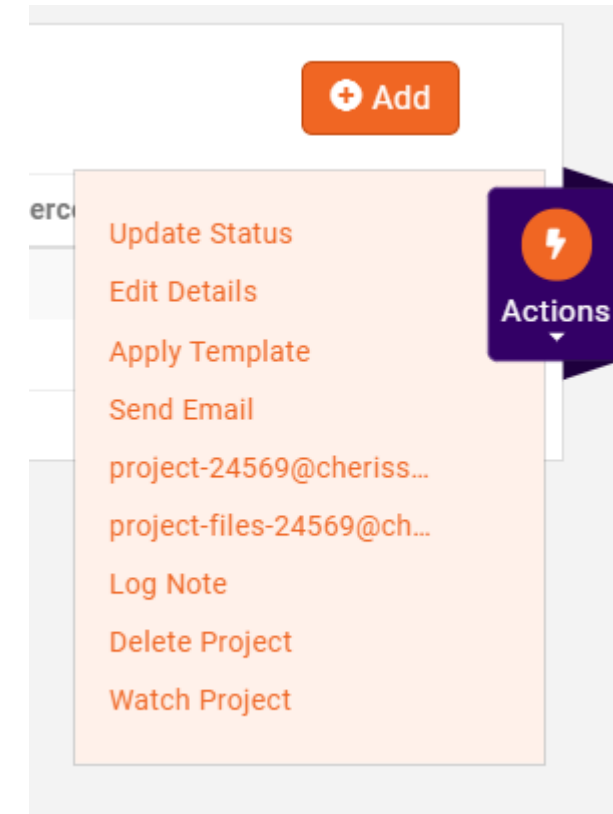
Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
Administrative	Important	Administrative		Cheri Petterson			0
Ambassador Tasks	Normal	Ambassador		Jason Bradley			0

Actions

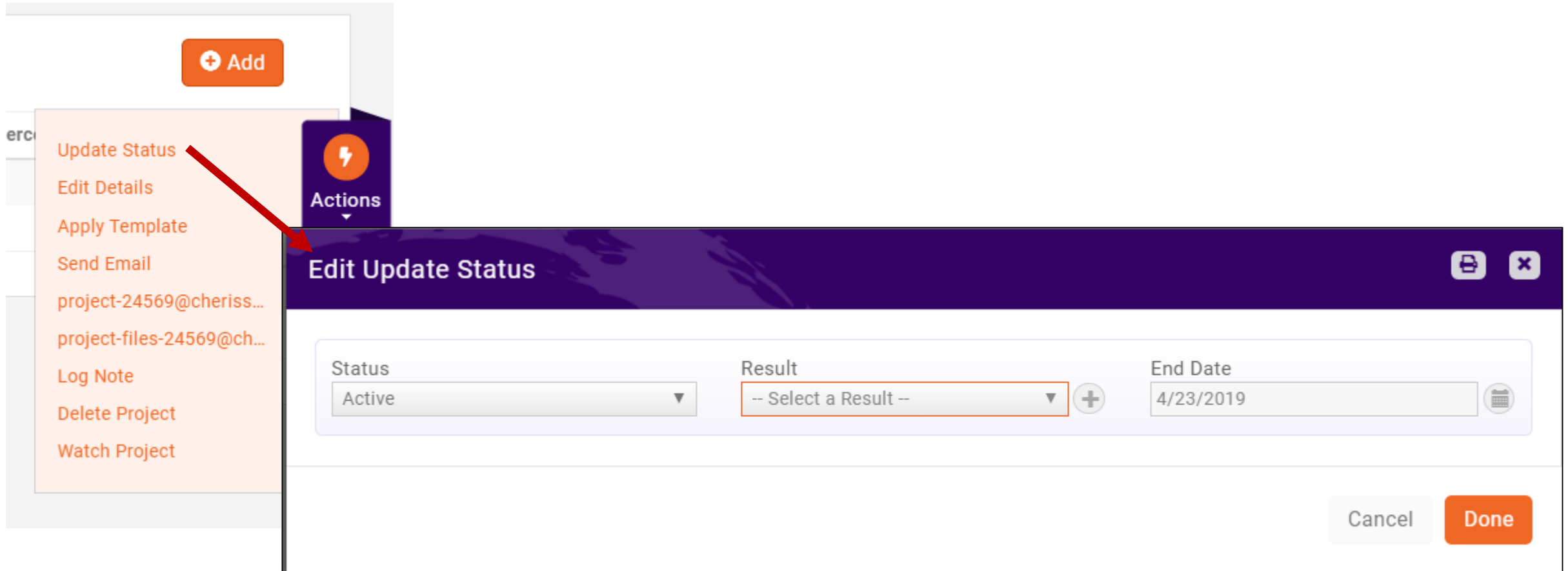
Monitoring & Updating Projects

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



WIKI: Update the Status of a Project

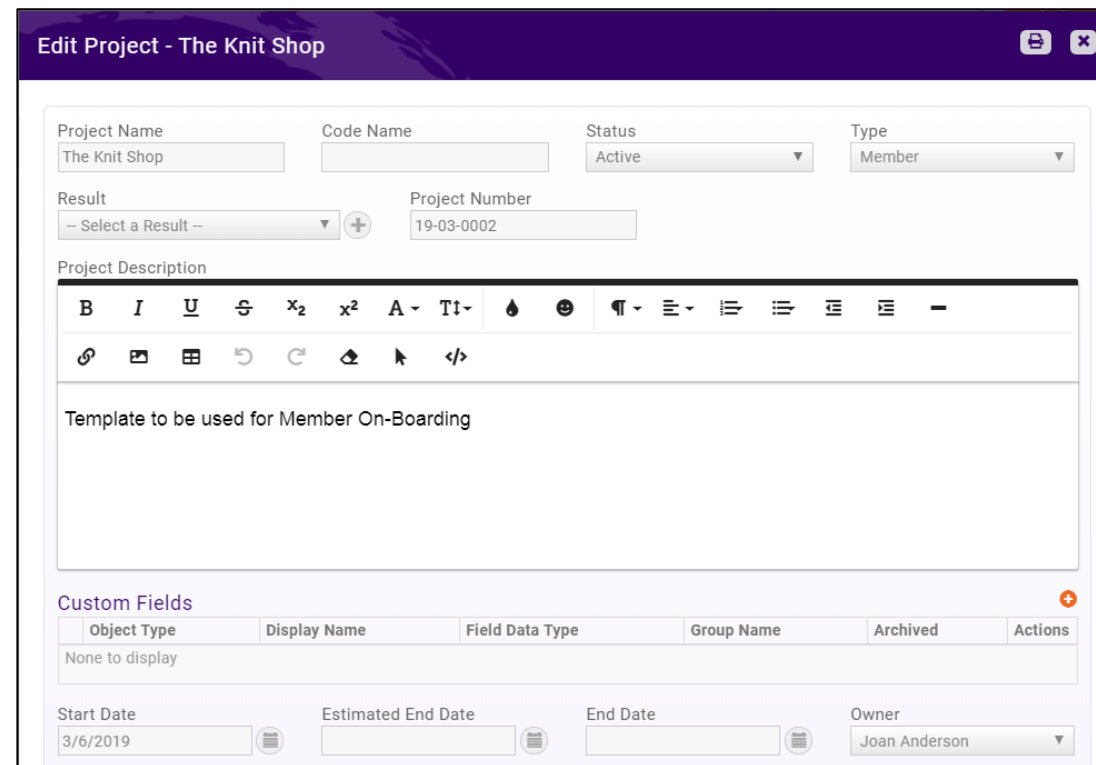
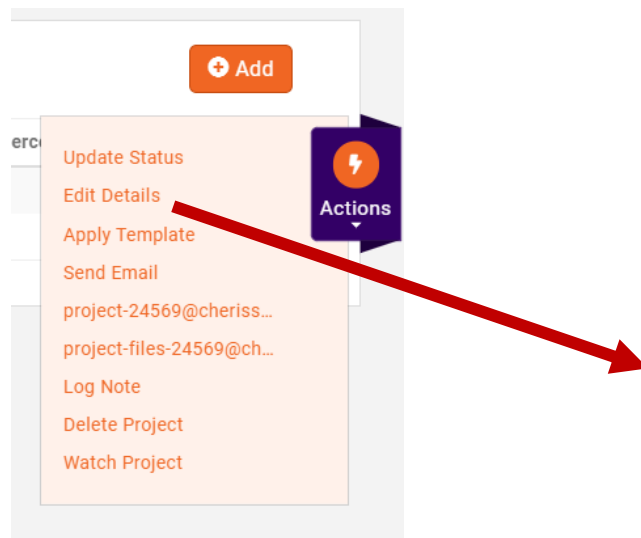


The screenshot displays the 'Edit Update Status' dialog box. On the left, a list of actions is visible, with 'Update Status' highlighted by a red arrow. The dialog box itself has a dark purple header with the title 'Edit Update Status' and icons for print and close. Below the header, there are three input fields: 'Status' (set to 'Active'), 'Result' (set to '-- Select a Result --'), and 'End Date' (set to '4/23/2019'). At the bottom right, there are 'Cancel' and 'Done' buttons.

Monitoring & Updating Projects

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

WIKI: [Edit Project Details](#)

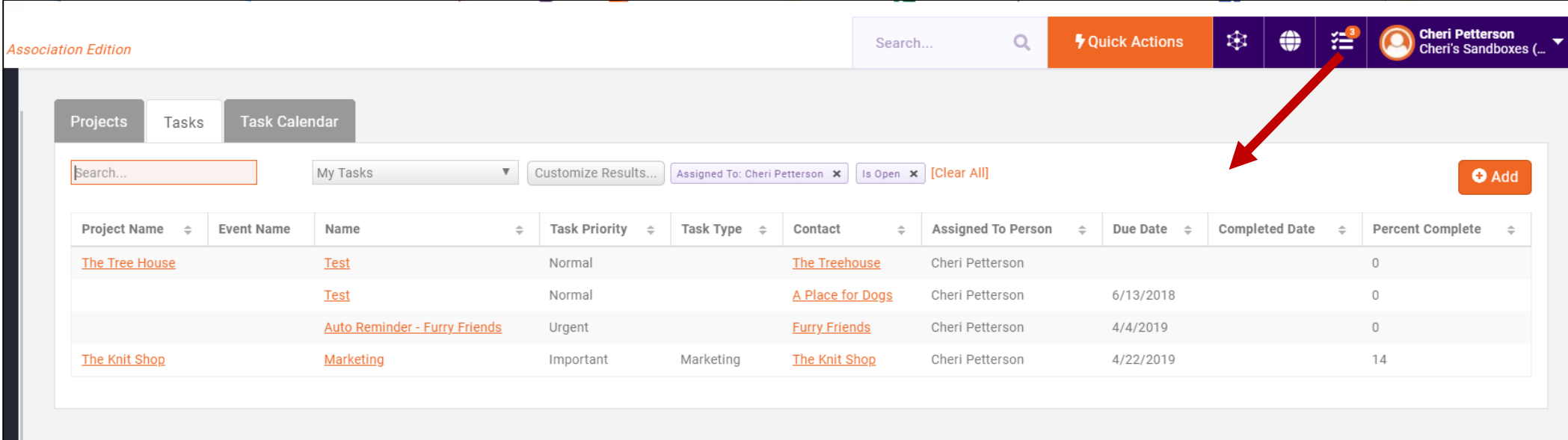


The screenshot shows the 'Edit Project - The Knit Shop' form. The form has a purple header bar with the title and window controls. Below the header, there are several input fields and dropdown menus:

- 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 bold, italic, underline, link, unlink, list, and other icons. The text area contains: "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



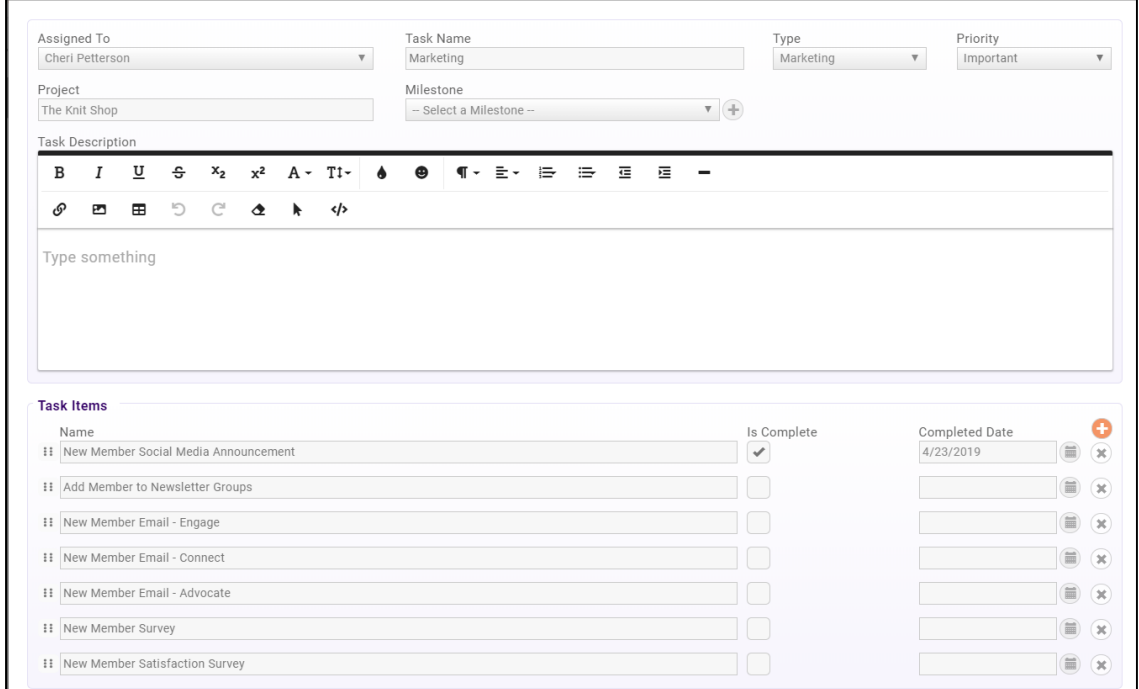
The screenshot shows the GrowthZone software interface. In the top header bar, there is a search box, a 'Quick Actions' button, and a 'Task List' icon (a list with a red notification badge) which is highlighted by a red arrow. Below the header bar, there are tabs for 'Projects', 'Tasks', and 'Task Calendar'. The 'Tasks' tab is active, showing a search box, a dropdown menu for 'My Tasks', and filter buttons for 'Assigned To: Cheri Petterson' and 'Is Open'. Below the filters is a table of tasks.

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](#)



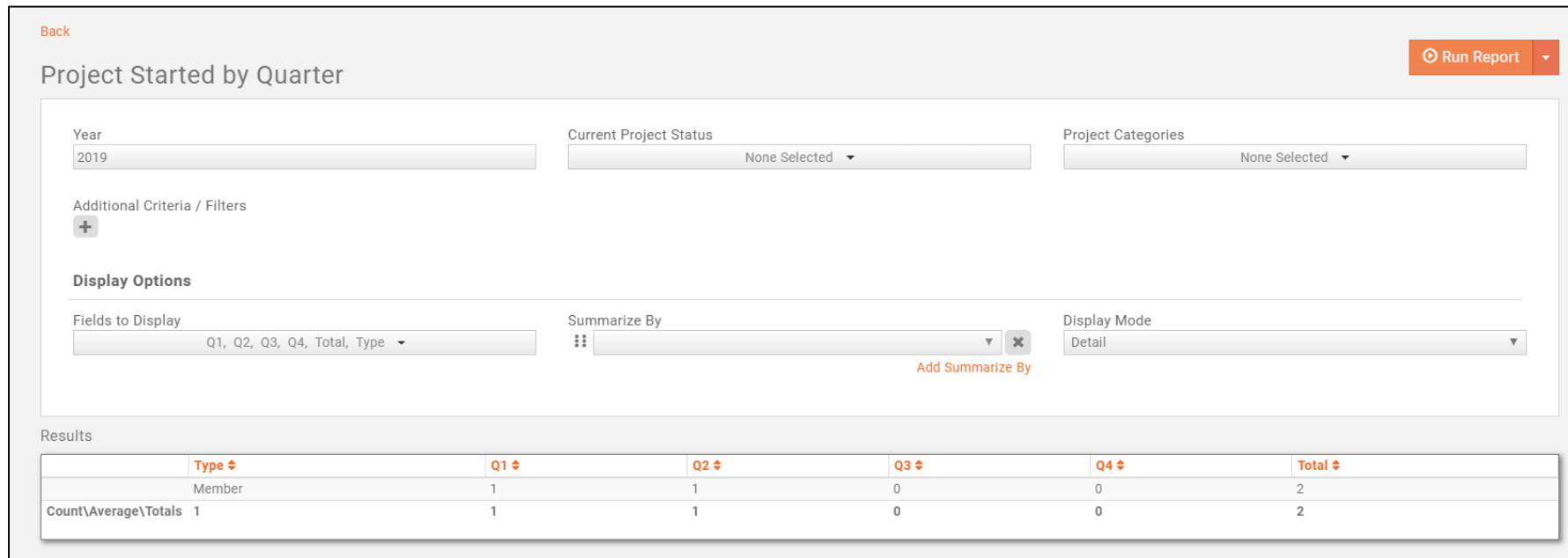
The screenshot displays the GrowthZone task management interface. At the top, there are several dropdown menus for task configuration: 'Assigned To' (Cheri Petterson), 'Task Name' (Marketing), 'Type' (Marketing), and 'Priority' (Important). Below these are 'Project' (The Knit Shop) and 'Milestone' (- Select a Milestone -). A rich text editor follows, with a toolbar containing various formatting options and a text area containing the placeholder 'Type something'. Below the editor is a 'Task Items' section with a table listing tasks and their completion status.

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

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

WIKI: [Project Started by Quarter](#)



The screenshot shows the 'Project Started by Quarter' report interface. At the top left is a 'Back' link. The main title 'Project Started by Quarter' is centered, with a 'Run Report' button on the right. Below the title are three filter sections: 'Year' (set to 2019), 'Current Project Status' (set to None Selected), and 'Project Categories' (set to None Selected). There is an 'Additional Criteria / Filters' section with a plus icon. Below that is a 'Display Options' section with three sub-sections: 'Fields to Display' (set to Q1, Q2, Q3, Q4, Total, Type), 'Summarize By' (with an 'Add Summarize By' link), and 'Display Mode' (set to Detail). At the bottom, the 'Results' section contains a table with the following data:

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

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

WIKI: [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


Projects Report

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

WIKI: [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						



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.

WIKI: [Task Report](#)

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?

