



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 the information in this guide to ensure you're getting the most out of your free ProjectManager trial.

Today's teams are hybrid, meaning they work across time zones, tools and experience levels, and they make up the present and future of the workforce. These teams must find a way to collaborate despite the challenges of the modern working environment.

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.

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



A stylized, handwritten signature in white ink, appearing to read 'RB' followed by a long horizontal stroke.

Ryan Buma, 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

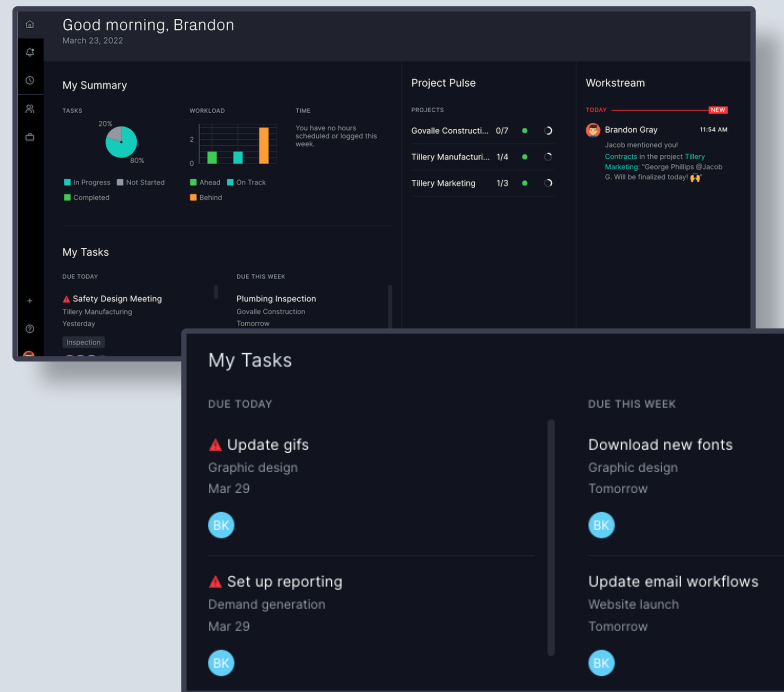
Our software offers multiple ways to work, allowing your hybrid team members to gravitate toward their view of choice. No one is permanently tied to a particular workflow, yet the project details remain unaffected. Learn more about our features below.

Home ALL PLANS

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

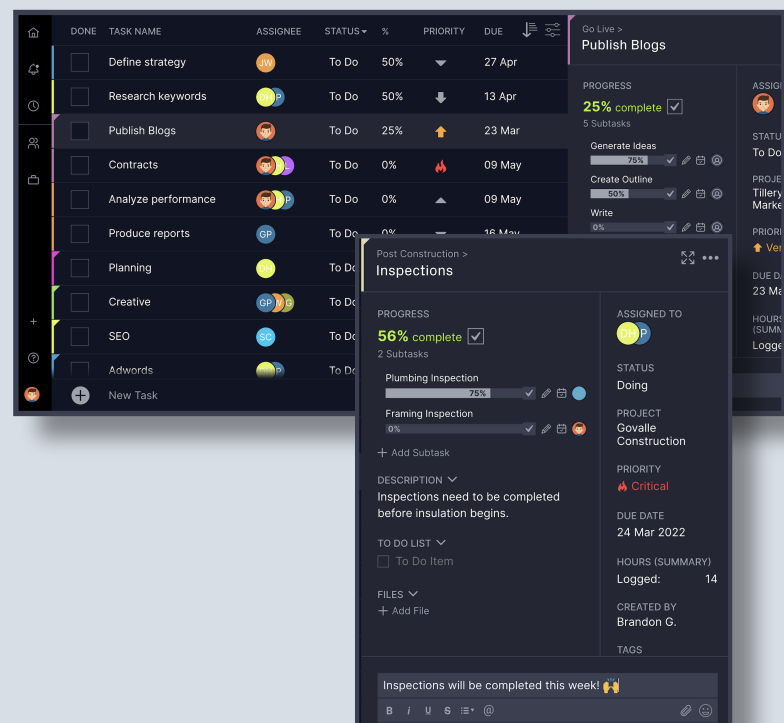


List ALL PLANS

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

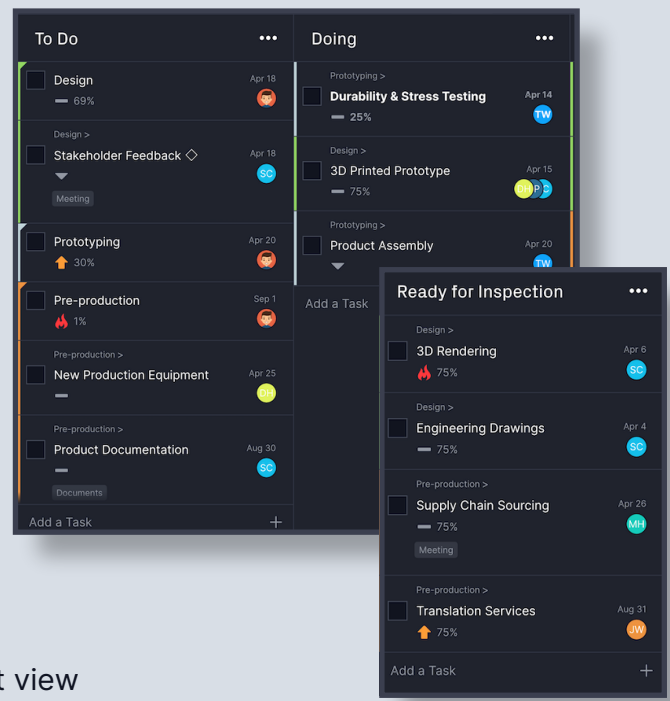


Board ALL PLANS

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

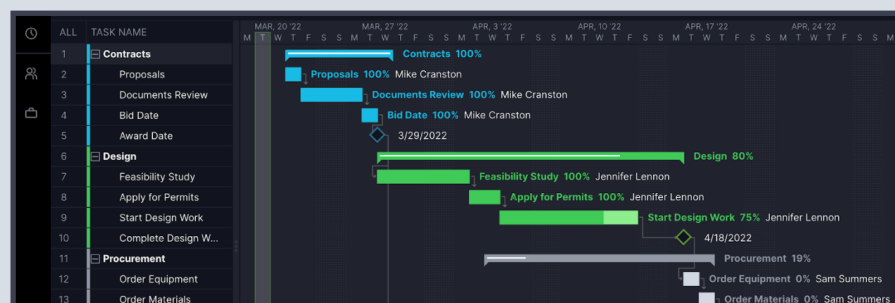
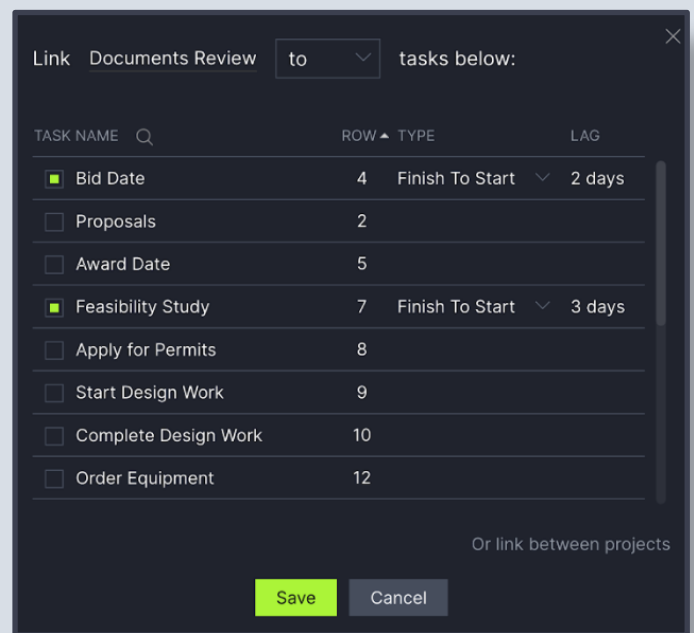


Gantt TEAM & ABOVE

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

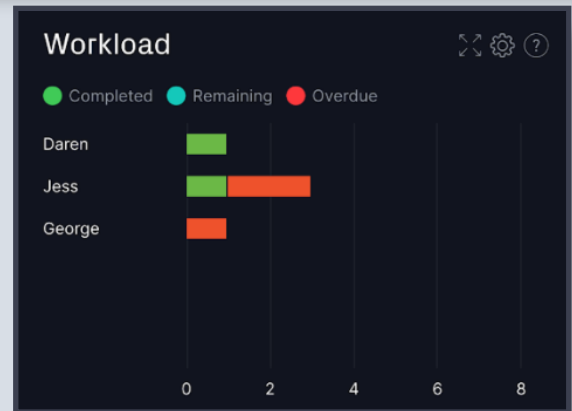


Project Dashboard ALL PLANS

Our Dashboard provides a place for users 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

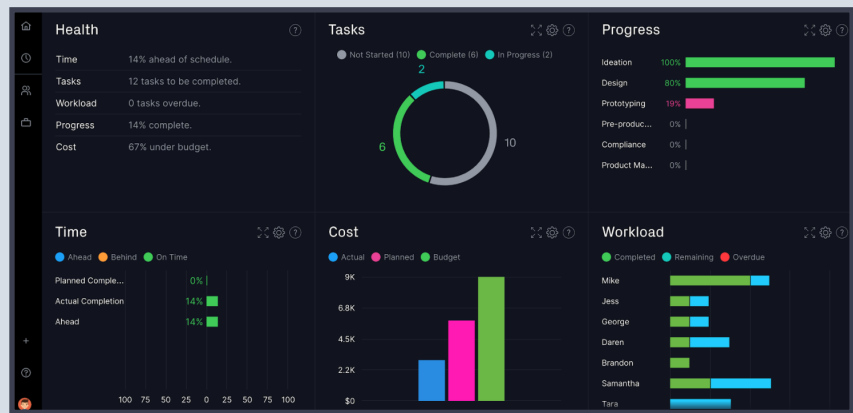


Portfolio Dashboard BUSINESS & ENTERPRISE

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



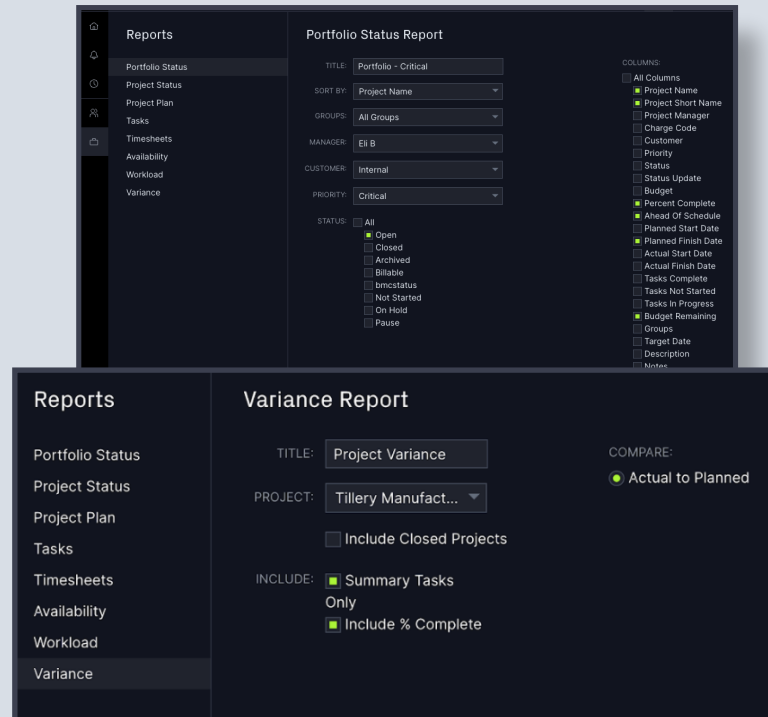
Reports

TEAM & ABOVE

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 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



Sheet

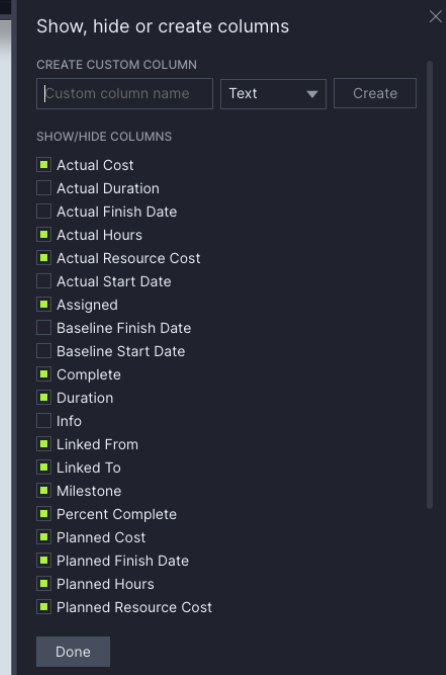
TEAM & ABOVE

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

ALL	TASK NAME	PERCENT COM...	DURATION	PLANNED START...	PLANNED FINISH ...	ASSIGNED	PRIORITY	PLANNED HOURS	ACTUAL HOURS
1	Planning	17%	7 days	3/28/2022	4/5/2022		Medium	82.5 hours	73 hours
2	Define KPIs	10%	1 day	3/28/2022	3/28/2022	Daren Hill	Medium	5 hours	1 hour
3	Evaluate Customer ...	25%	1 day	3/31/2022	3/31/2022	Michael Glover,Mike Horn	Medium	16.5 hours	14 hours
4	Define Budget	50%	1 day	4/1/2022	4/1/2022	Jess Wimberly,Mike Horn	Medium	8 hours	8 hours
5	Brainstorm Ideas		2 days	4/4/2022	4/5/2022	Brandon Gray,George Phillips,J. High		53 hours	50 hours
6	Creative	69%	22 days	4/6/2022	5/5/2022	George Phillips,Jess Wimberly	Medium	19 hours	14.5 hours
7	Write Content	100%	8 days	4/6/2022	4/15/2022	Mike Horn	Medium	3 hours	5 hours
8	Design Assets	75%	5 days	4/18/2022	4/22/2022	George Phillips	Medium	6 hours	6 hours
9	Build Landing Pages	50%	5 days	4/25/2022	4/29/2022	Michael Glover	Medium	7 hours	3 hours
10	Review and Edit Cre...	25%	4 days	5/2/2022	5/5/2022	Jess Wimberly	Medium	3 hours	0.5 hours
11	SEO	61%	11 days	4/6/2022	4/20/2022	Samantha Cummings	Medium	55 hours	18 hours
12	Define strategy	50%	4 days	4/6/2022	4/11/2022	Jess Wimberly	Medium	15 hours	14 hours
13	Research keywords	50%	2 days	4/12/2022	4/13/2022	Daren Hill,George Phillips	Low	15 hours	4 hours
14	Update website met...	75%	5 days	4/14/2022	4/20/2022	Brandon Gray,Daren Hill	Very Low	25 hours	
15	Adwords	62%	10 days	4/21/2022	5/4/2022	Daren Hill,George Phillips	Medium	30 hours	
16	Define strategy	50%	5 days	4/21/2022	4/27/2022	Jess Wimberly	Low	25 hours	
17	Build ads	75%					High	5 hours	
18	Go Live						Medium	12 hours	

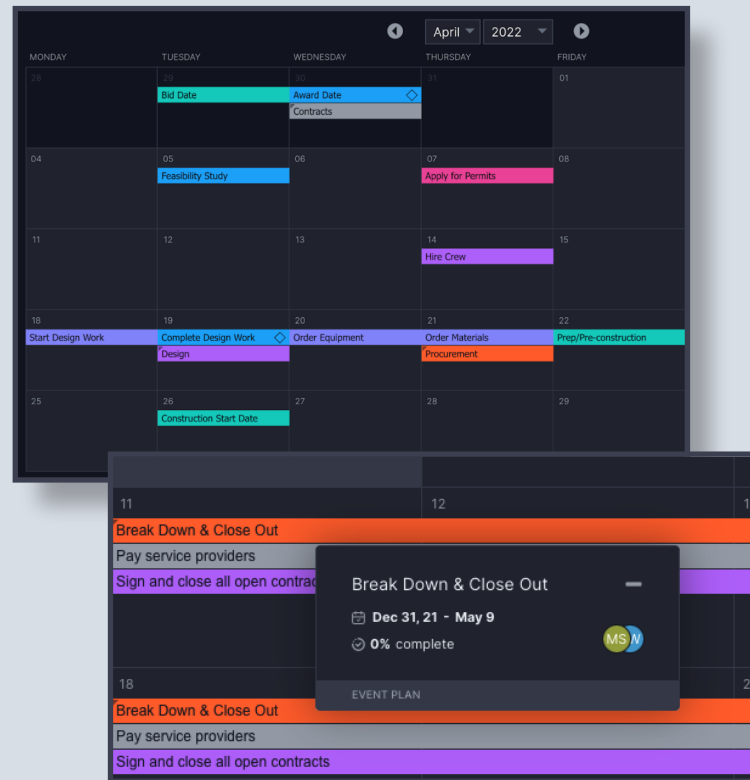


Calendar ALL PLANS

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 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

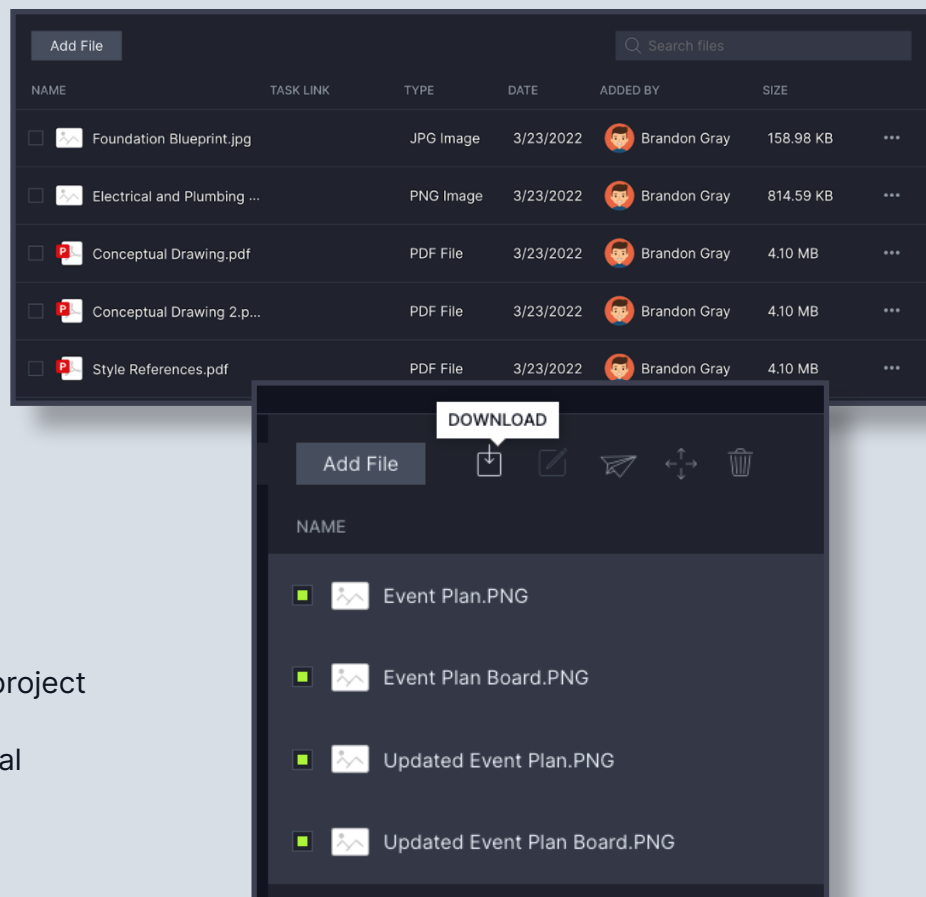


Files ALL PLANS

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

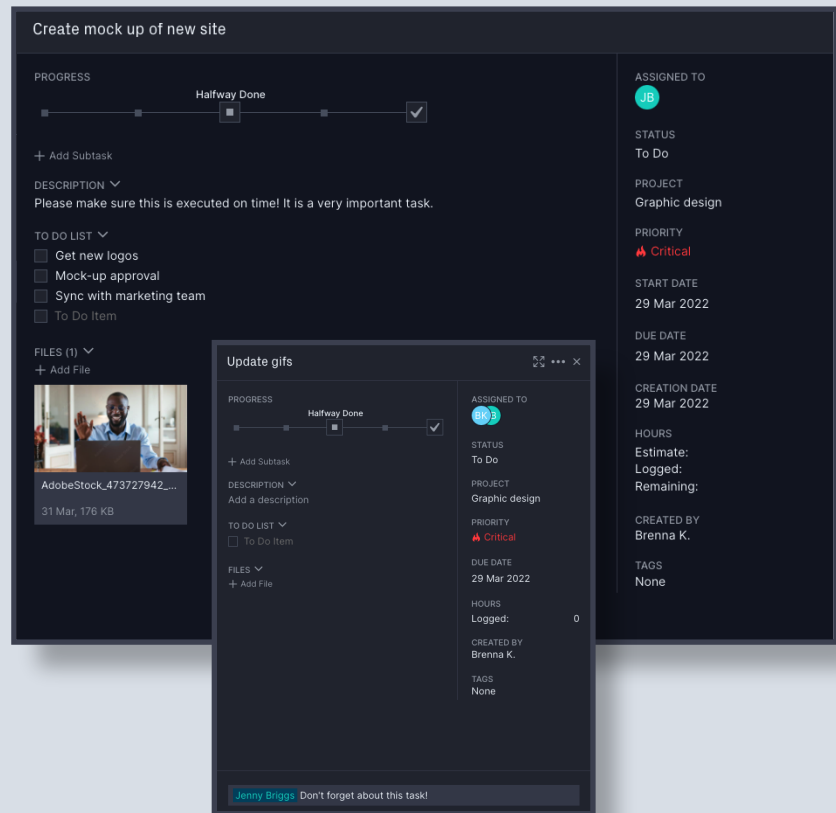


Collaboration ALL PLANS

Whether you're looking for collective project feedback, need to house all feedback in one place or simply need to communicate with team members in a different time zone, our collaboration features help hybrid teams thrive.

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

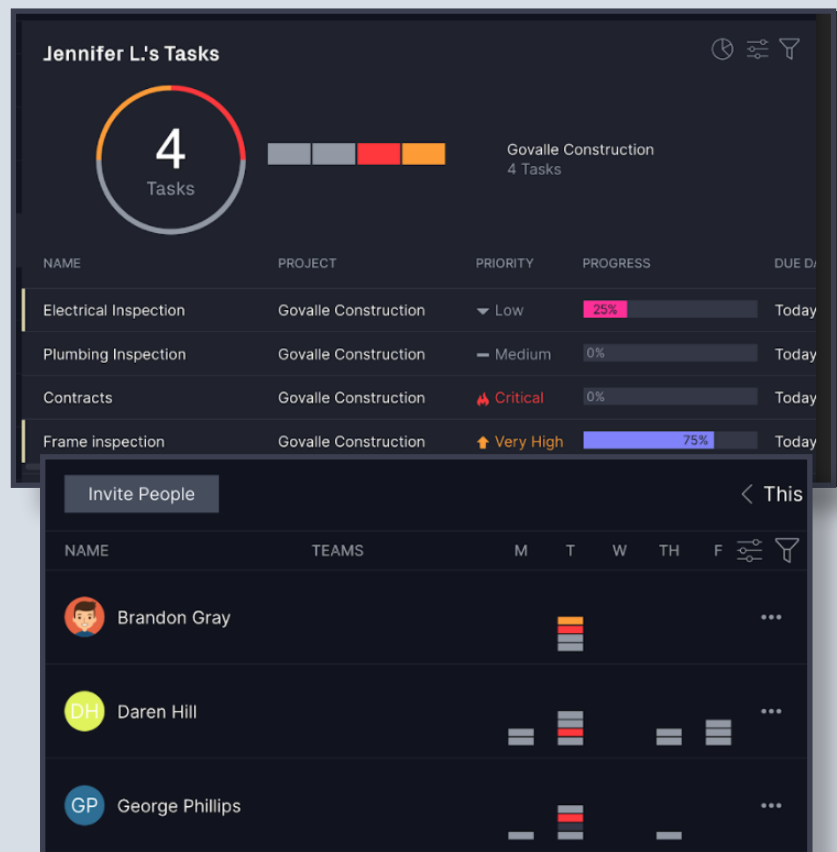


Team Page ALL PLANS

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

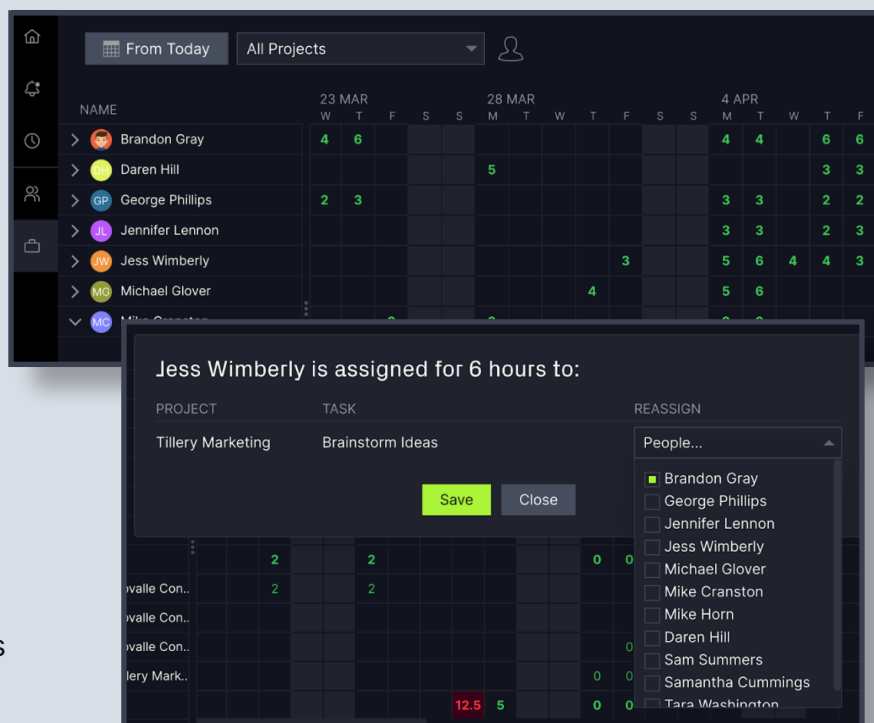


Workload BUSINESS & ENTERPRISE

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

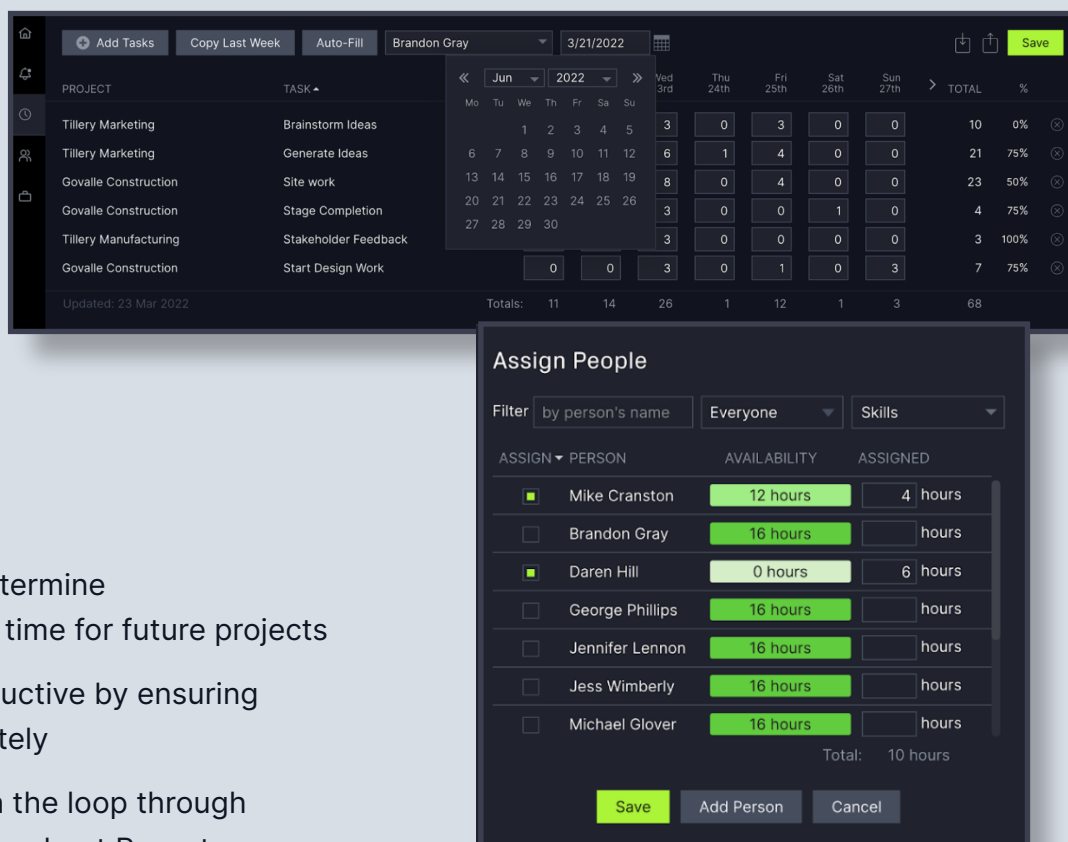


Timesheets BUSINESS & ENTERPRISE

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 Summary ALL PLANS

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



Portfolio Breakdown

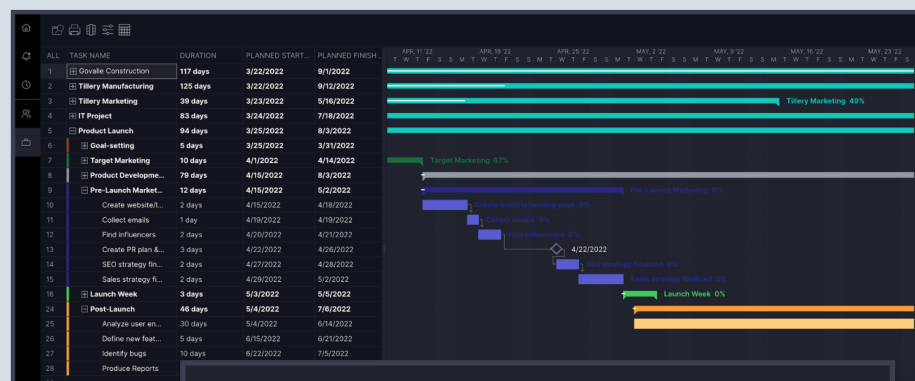
PROJECT	TIME	COST	WORKLOAD	PROGRESS	TOTAL COST
Govalle Construction				51%	\$3,680 38.7%
Tillery Manufacturing				15%	\$3,000 66.7%

Roadmap BUSINESS & ENTERPRISE

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



Show, hide or create columns

CREATE CUSTOM COLUMN

Custom column name Text

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

Success Story

Dan Smith is head of portfolio at CatSci, a process research and development clinical research organization. He oversees the scientific teams, which doubled over the course of 2020.

His role is focused on project delivery and making sure CatSci's customers achieve the outcomes they desire. Smith was part of the group of decision-makers who chose ProjectManager for the organization.

According to Smith, "The majority of our projects come from big pharmaceutical companies. They send us a molecule [and we figure out] how to scale production so we can make kilos of the material. We have teams of three to four people, often cross-functional, working on that, and then we have a project manager across three or four projects, who is responsible for not just the customer interaction, but also the technical quality."

Why Did CatSci Choose ProjectManager?

"ProjectManager was the most egalitarian [treating all users as equals] and empowering of all the different tools we looked at," Smith said. Other tools just didn't give his teams the freedom they needed to do their work.

One of the fundamental differences between ProjectManager and similar offerings is that ProjectManager offered the transparency Smith wanted for his teams. It had multiple project views, strong communication and the flexibility to adapt to their hybrid work environment.

"With really good scientists, you need a high degree of trust. ProjectManager lends itself to a trust in teams," he said. "We work with agile teams, and ProjectManager empowers them to deliver—unlike other software that restricts them and stops people from seeing things."



Smoothed the Transition to Remote

In 2020, as more people in the company began working from outside the office, ProjectManager continued to facilitate that work and keep everyone connected. “It’s really positive how we can use ProjectManager and don’t have to physically go find someone,” Smith said. “It’s difficult to imagine life before ProjectManager.”

“I mean, I really love the software,” Smith adds. “I think it’s fantastic. I can’t say enough positive things about it. The openness of ProjectManager and how it empowers our scientists. It allows them to build the tool they need to solve the problems they have and communicate with the team freely and easily. That is very powerful.”



We Want to Hear From You!

The above CatSci success story is only a small representation of how businesses across the world use ProjectManager to get organized and achieve great things in this new hybrid landscape. If you found the information in this guide to be useful, we encourage you to pass it along to your coworkers so everyone can get the most that they can out of their free trial.

For even more resources and helpful tips, you can visit our Product Videos page. If you have further questions

about pricing, plans, use cases or our product in general, don't hesitate to reach out to us!

Visit www.projectmanager.com/contact or feel free to email us at support@projectmanager.com.

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