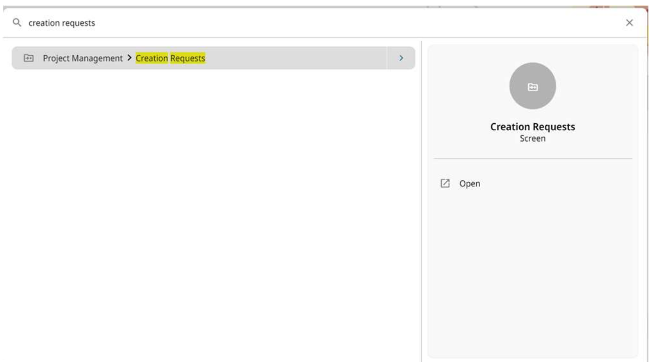
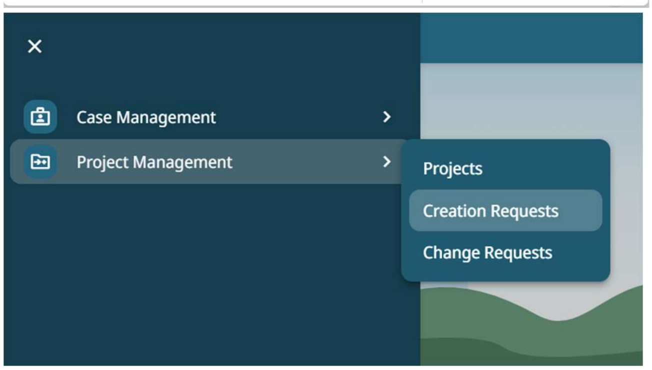
EL-ITE Project Management

Request a Project

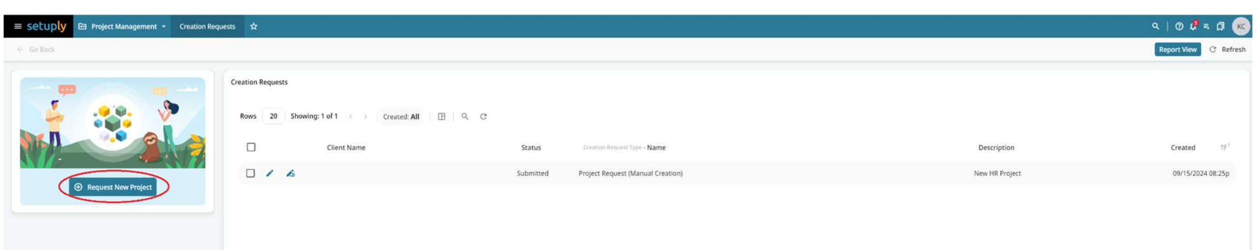
Navigate to the “Project Creation Request” section of Setuply. You can navigate by typing “Creation Request” into any open space, using the magnifying glass search widget, or by using the traditional hamburger menu.





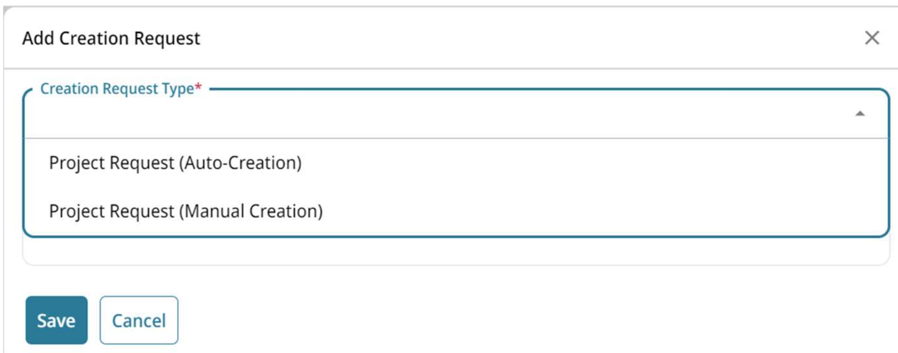
Creation Requests

Depending on how many Creation Requests you have, you will either land on the Simple View:



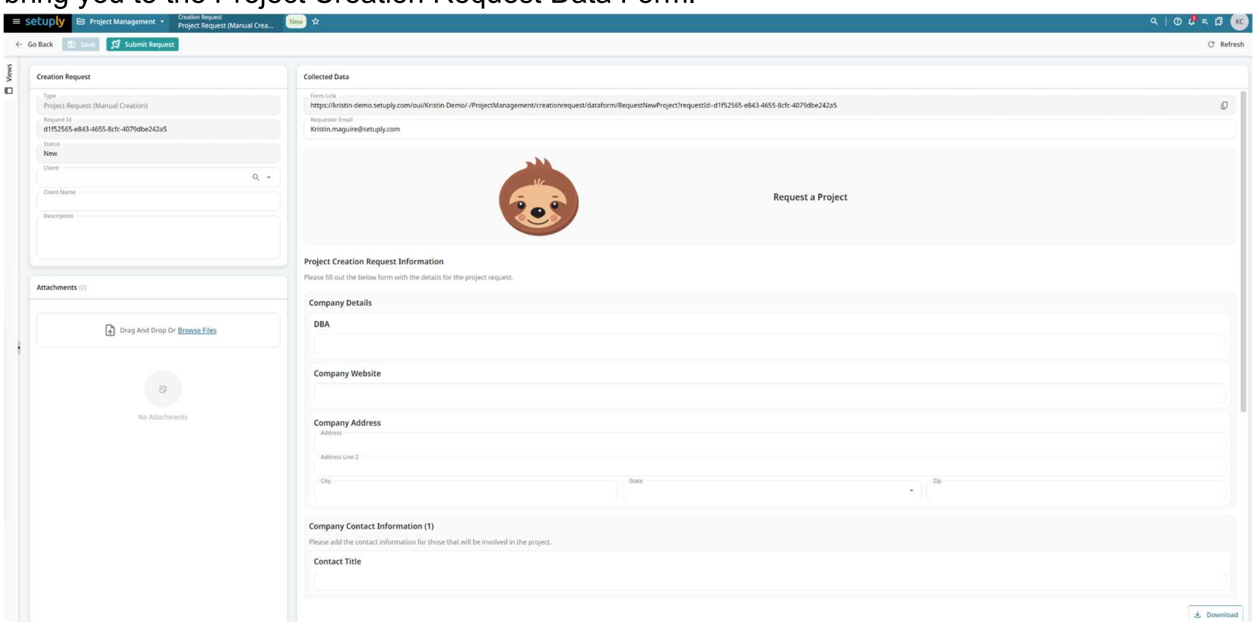
Or the Report View :

This is where you can see all of your Project Creation Requests. In both the Simple and Report views, you can click "Request a New Project," which is circled in red on the screenshots. This will prompt a pop-up to start the request. Select the type of project you would like to request from the drop-down. The number of Project Requests EL-ITE has available will determine how many options are in the drop-down.



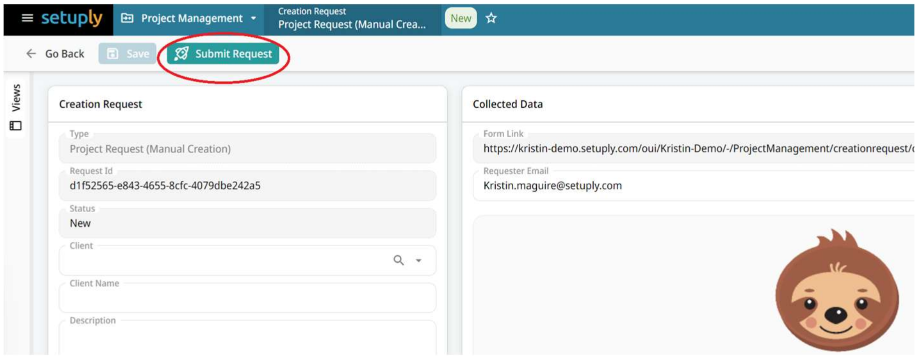
*This screenshot is from a demo system with 2 options. EL-ITE will have different options for Project Requests.

Once you have selected your Project Request type from the drop-down, select "Save". This will bring you to the Project Creation Request Data Form.



*This is an example so the actual form you fill out for EL-ITE will be different.

When you have completed the Project Creation Request Data Form and reviewed the answers, please select "Submit Request" at the top left-hand corner of the page.

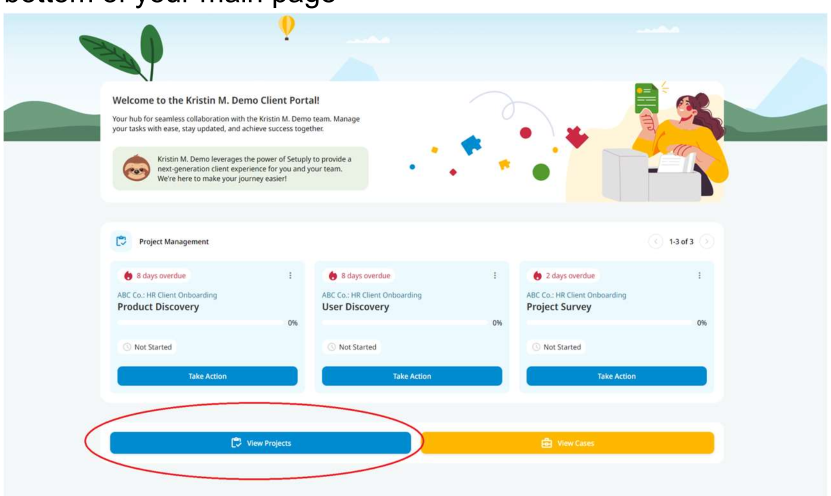


Pro Tip: If you are working on a Project Creation Request Data Form and are not ready to submit. You can choose the “Go Back” option and the information you have added will be saved, but not submitted. You can re-enter the Project Creation Request Data Form from the Simple or Report View to complete it later.

Once a Project Creation Request has been submitted, it will be viewed by the EL-ITE team and they will be able to create the project and invite you to it. Once the project is created you will view that project in the “Projects” part of Setuply.

Projects

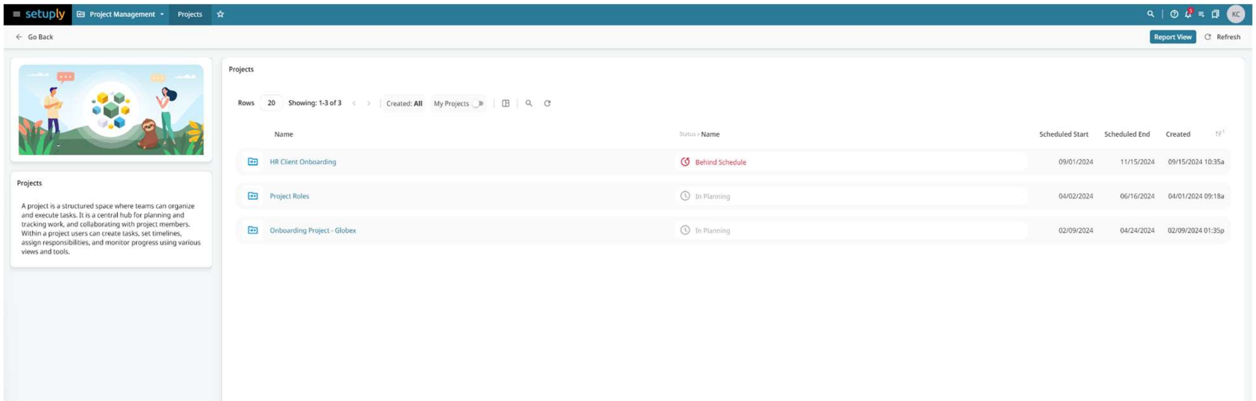
Navigate to Projects using one of our navigation methods or by clicking “View Projects” at the bottom of your main page



Depending on how many active projects you have, you will either see the Simple View or the Report View. You can change the view by clicking on either “Simple View” or “Report View” at the top right-hand corner of the Screen.

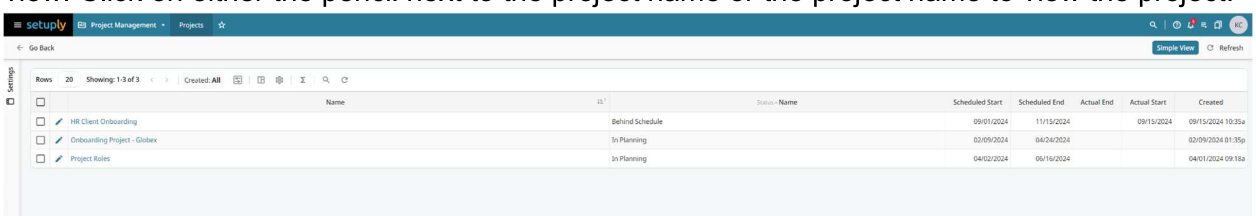
Simple View

The Simple view is designed to give you a quick view of projects. You can click on a project name to view a project. You can also see the status of the project with the Scheduled Start, Scheduled End Date and Created Date.



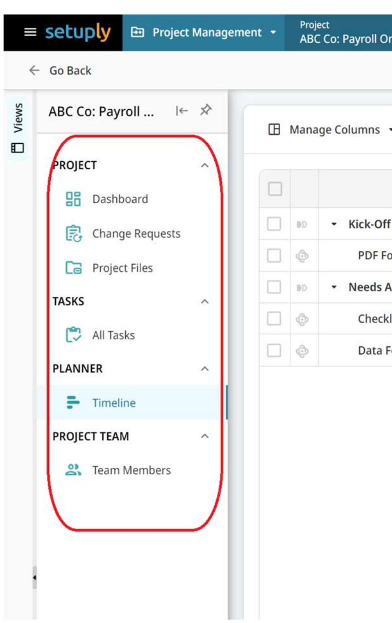
Report View

The Report view of Projects is a detailed editable view of your project and associated details. You can utilize the Report settings at the top of the table to customize the information you can view. Click on either the pencil next to the project name or the project name to view the project.



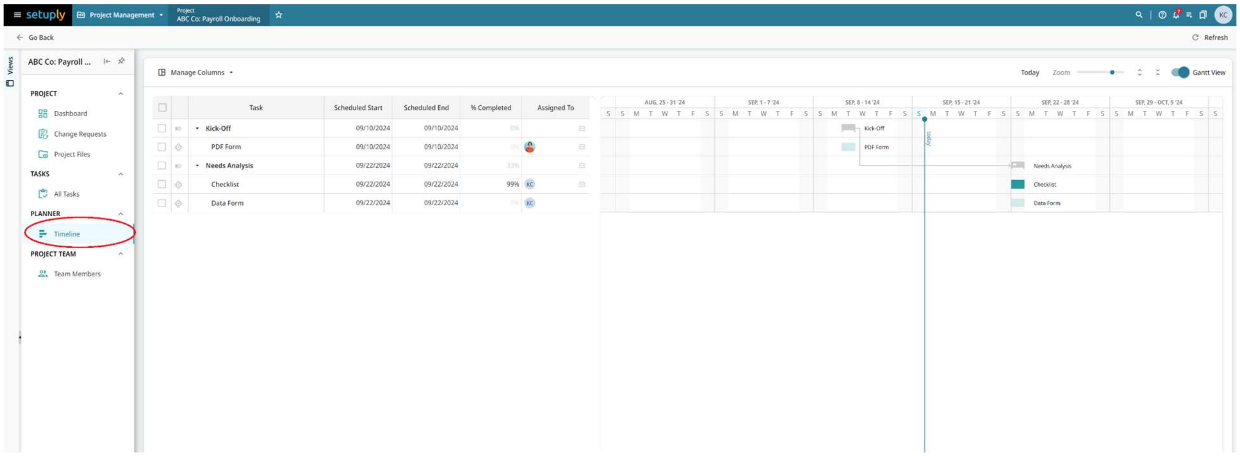
Specific Projects

When you click into any project you will land on a new view specific to your project. You will most likely land on the "Timeline" section of the project, but you can navigate to any of the other project-specific sections on the left-hand side of the screen.

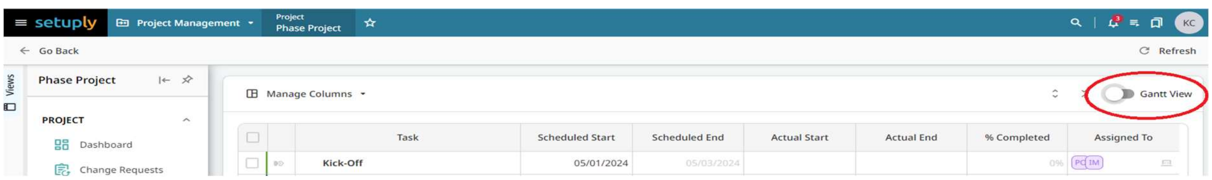


ı the full picture of your project. You can choose to view the
Chart (or split the screen with both!). You can resize the width of

the List or Gantt Chart by sliding the divider between the two. Both views show you when tasks/phases are set to start and their expected completion date. You can also see who each task is assigned to and get ahead on any work that needs to be done.

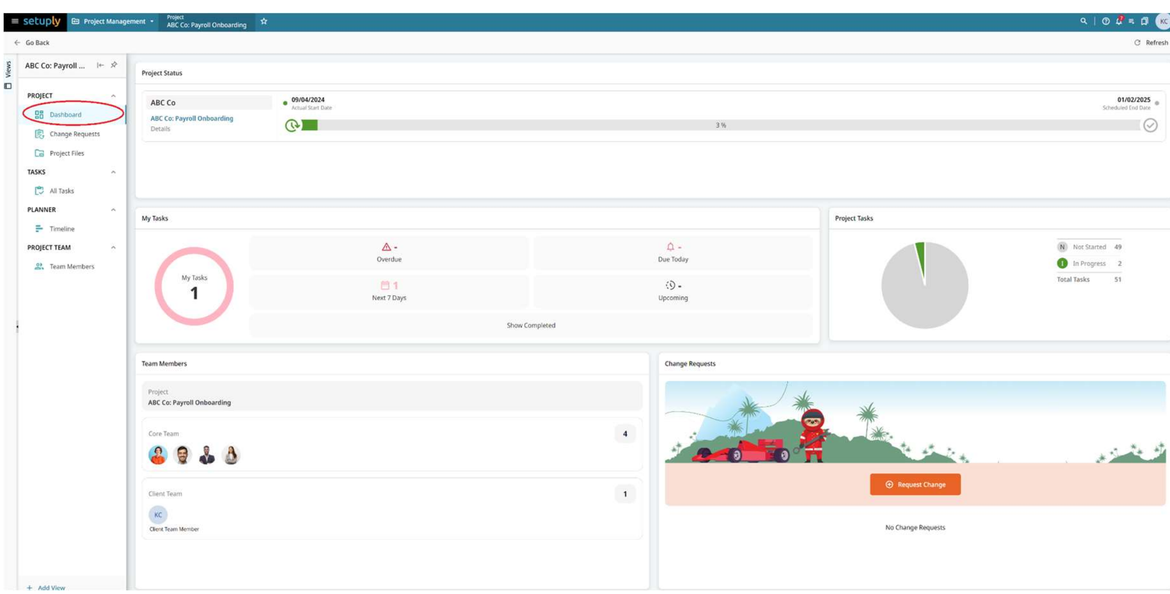


You can also fully remove the Gantt Chart by clicking on the toggle at the top right-hand side of the screen.



Dashboard

The "Dashboard View" is a personalized view filled with helpful Widgets to provide project information. Customize this so that you have all the information at your fingertips.



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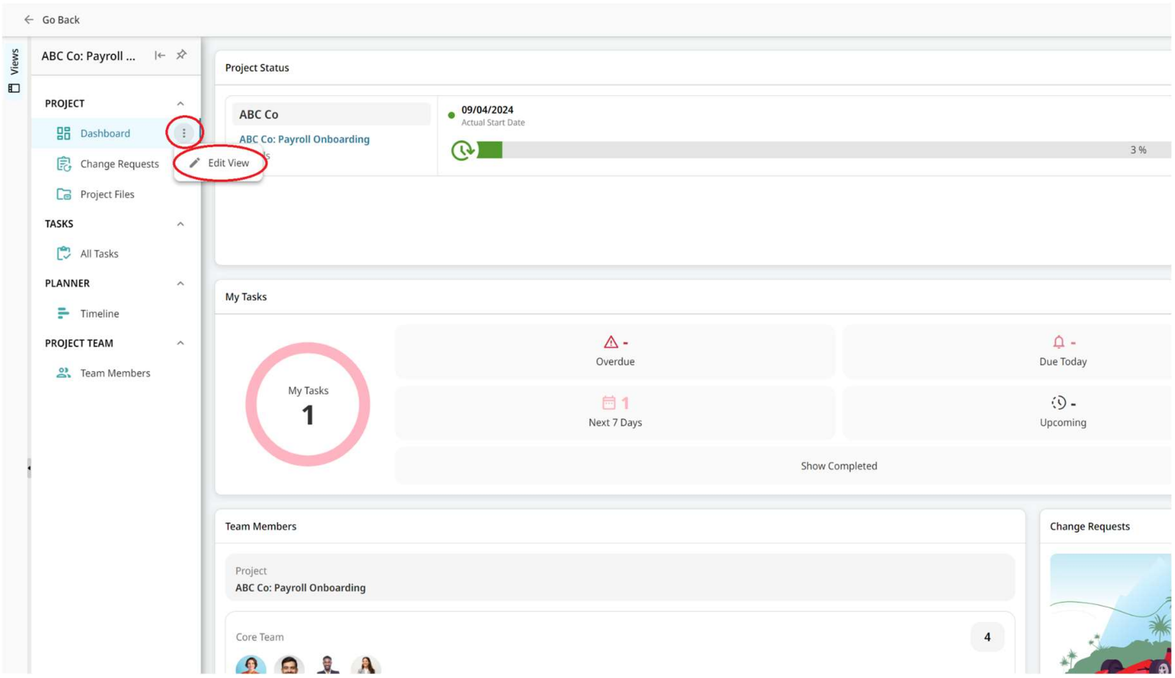
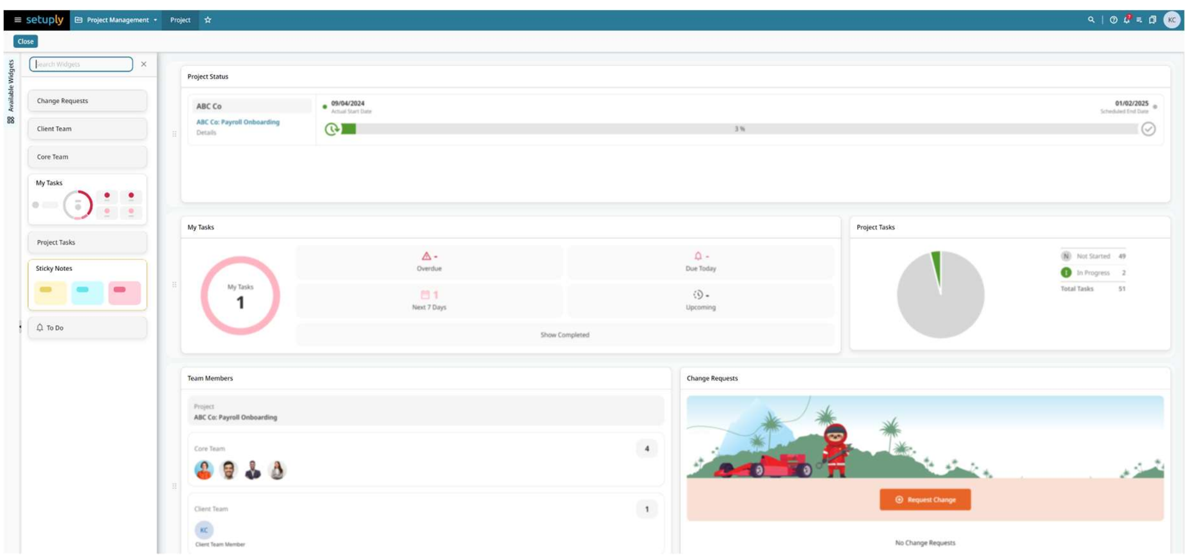
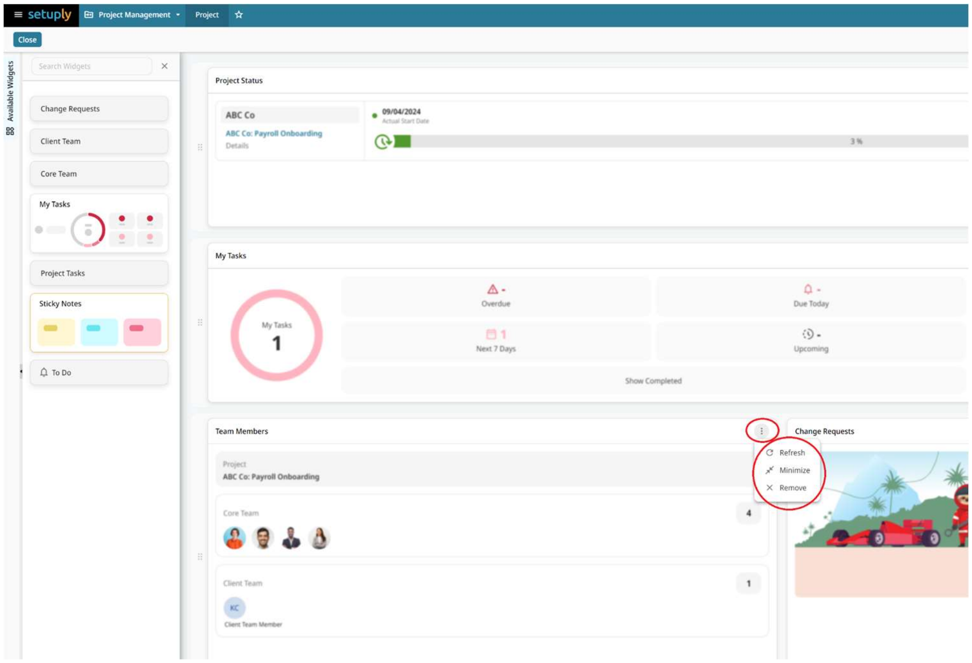


Once you are in Edit mode, the Widgets that are available to you will be displayed on a new left-hand panel. To add a Widget to your Dashboard, click on the Widget and drag it into place on the Dashboard.



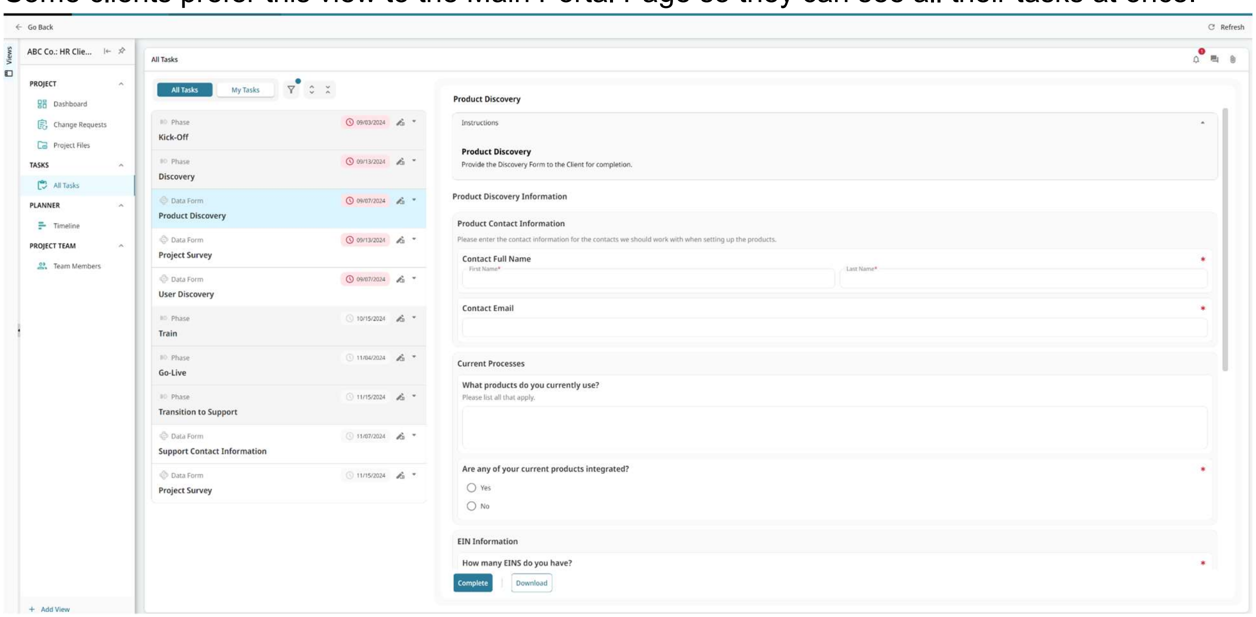
To remove a Widget, hover over the top right-hand corner of your Widget and click the three dots that appear. Here, you will see an option to “Close” the Widget. If you remove a Widget, it will become available for you to re-add on the left-hand panel.

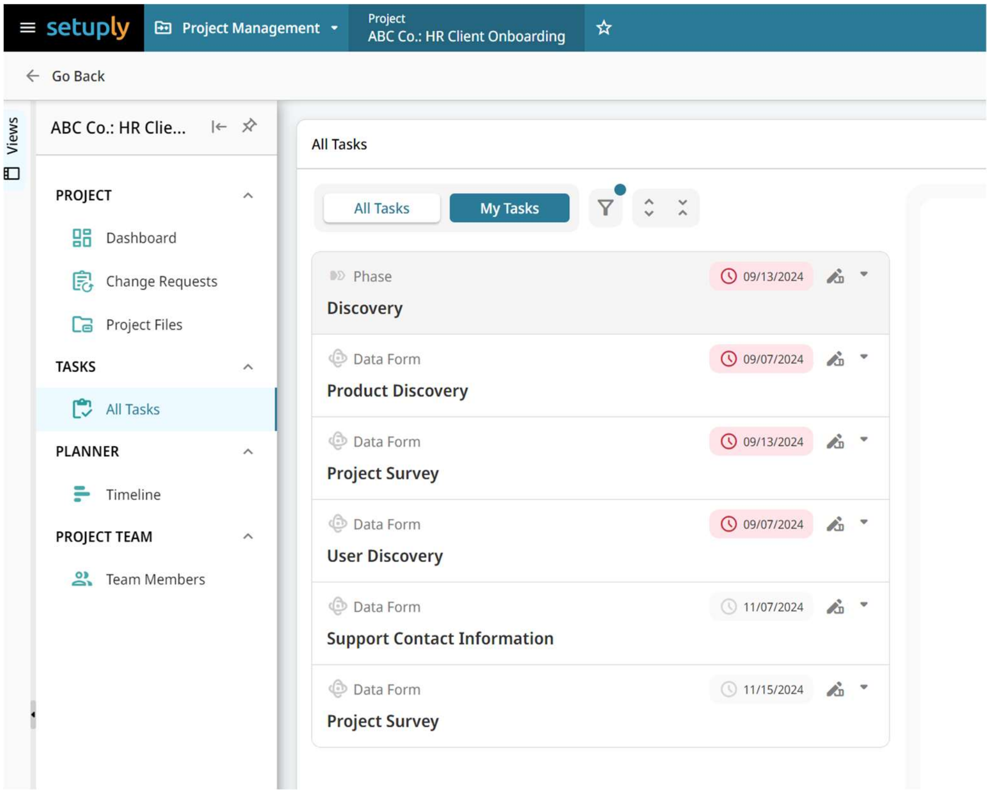


All Tasks

This view gives you the ability to see all of the tasks and toggle to tasks that are assigned to you. To view and work on a task, click anywhere on the task and it will pop up for you on the right-hand side of the screen.

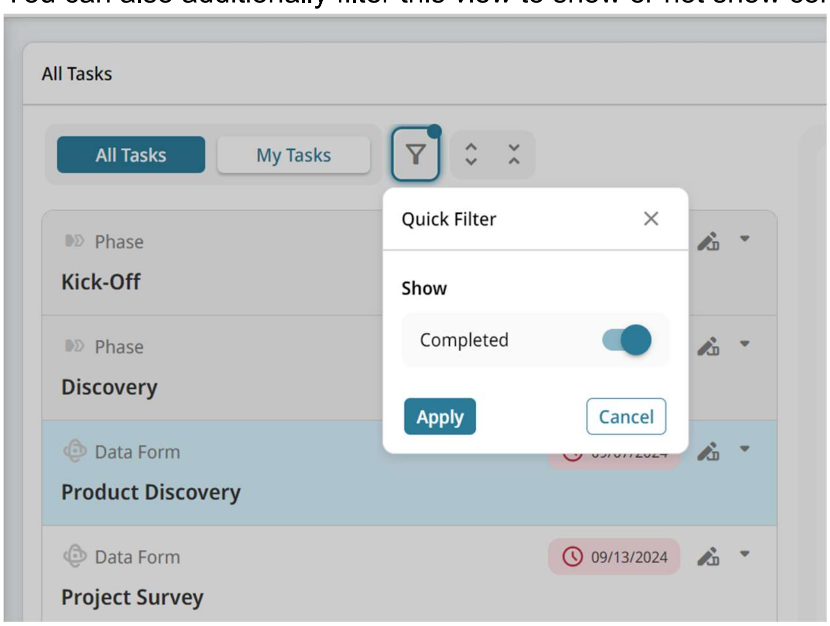
Some clients prefer this view to the Main Portal Page so they can see all their tasks at once.





Pro Tip: Some clients prefer this view to the Main Portal Page so they can see all their tasks at once.

You can also additionally filter this view to show or not show completed tasks



Team Members

To see all of the team members associated with the project, you can use the “Team Members View.”