Introduction

What is Teamwork Projects?

“Teamwork Projects” is a component of Teamwork.com that serves as a way to keep team tasks in one place, organized to allow us all to see the major projects or tasks of each team.

It is an online application, separate from the University, used by companies around the world to bring together teams.

Why Use Teamwork?

Teamwork has several benefits over other options, including:

- Online, mobile-ready (even has an app), and does not require specific software
- Easy-to-use yet robust enough when compared to other Project Management solutions such as Microsoft Project, SmartSheet, Trello, BaseCamp, and others.
- Gantt chart capability to have a visual of the team’s tasks

Getting Started with Teamwork Projects

First Use: Establish Login

You should receive an email from Teamwork.com that lets you know of the Project named CALS Business Services. It will have a link to click that will allow you to set your password. If you do not see this email in your Inbox, check your Junk folder; if not in either place, contact Alma.

This login is your full email address and a new password. This is not tied to your NetID.

Location of CALS Teamwork Site

http://calsbiz.teamwork.com

Logging into Teamwork

1. Go to http://calsbiz.teamwork.com
2. Login using your **self-created password** and **full UA email** address. **If you forget your password**, click the “Forgot your password?” link and follow instructions.

Navigating Teamwork Menus

The **main menu** for Teamwork is at the **very top**.

**Projects**, the most important in the Top Menus, takes you to the Tasks listing. **Calendar** is not a functionality that we are currently using.
Your **profile photo** displays **user options**, including Sign Out, My Tasks, and Edit My Details.

**Updates** is a link to new updates to the Teamwork online application

**Quick Add** isn’t recommended for use and leads to improper task additions

**Switch Project** is a way you can return to the Tasks listing

The **bell** icon displays any recent activity and notifications

### Navigating the Projects Area

Clicking **Projects should take you directly to Tasks**, but if it does not, here’s how to navigate.

1. Projects sometimes takes you to a listing of Projects before you can see Tasks.
2. Notice the filters at top. Be sure the filter section is set for **Current** or **All Active**. Otherwise, the listing will not show the Project named CBS Projects and Tasks
3. Then click **CBS Projects and Tasks**

4. Then, you will see the listing of Tasks where you can add new Tasks or edit existing ones.

---

**Working with Tasks**

**Add a New Task**

1. Once logged-in, you should immediately be taken to Tasks in the Project named “CBS Projects and Tasks.” If not, refer to the Navigating Teamwork section in this guide.
2. Find your team under Tasks or Task lists
   **Recommendation**: use the Task lists section; it’s an at-a-glance view and consistent

3. Click the “Add a task” green button
4. Type the name or very brief description of your team’s task where it says “What needs to be done?”

5. Indicate the Start Date and End Date of the task

You can type the date, select from the pop-up calendar, or use the links beneath the fields, such as Today, +1 Day or +1 Week.
6. Optionally, a Description can be added to the task using the 4-lines icon

7. Click the “Save my changes” green button

8. The task is added.
9. Teamwork now sets up for you to add another task just below your newly created task. You can proceed to add another task or simply click the Cancel link.

Edit an Existing Task

1. Once logged-in, you should immediately be taken to Tasks in the Project named “CBS Projects and Tasks.” If not, refer to the Navigating Teamwork section in this guide.

2. Find a team under Tasks or Task lists
Recommendation: use the Task lists section; it’s an at-a-glance view and consistent

3. Find the task you want to edit, and hover over it to reveal the option icons for the task, including the edit icon. Click the edit icon.
4. Once clicked, you’ll be in edit mode for that task.

5. Make changes as needed. Then, click the “Save my changes” green button.
Add a Sub-Task

1. Once logged-in, you should immediately be taken to Tasks in the Project named “CBS Projects and Tasks.” If not, refer to the Navigating Teamwork section in this guide.

2. Find a team under Tasks or Task lists
   Recommendation: use the Task lists section; it’s an at-a-glance view and consistent
3. Hover over the title of the Task to which you want to add a Sub-Task to reveal the option icons to the right

4. Click the Add Sub-Tasks icon

5. A Sub-Task section opens

6. Click where it says “Add sub-task” or “No sub-tasks yet” in order to add a sub task. Or click Close to cancel.
7. The familiar Edit Task screen will now show beneath your Task

8. Edit as usual and click the “Save my changes” green button when done

9. Teamwork now sets up for you to add another Sub-Task just below your newly created Sub-Task. You can proceed to add another Sub-Task or simply click the Cancel link.

10. Once done adding Sub-Tasks, you’ll see a clickable number next to the Task which allows you to view or hide the Sub-Tasks
Setting Recurrence on Tasks

In addition to the start and end date for tasks, recurrence can be setup.

1. Enter Edit mode for the task
2. Click the recurrence icon
3. Set the type of recurrence
4. Click the “Save my changes” green button

When you check-off a task to indicate it is complete, if recurrence is setup, then the task will clear and a new one will display with the next date it should recur.
Assigning Tasks to People

1. Enter Edit mode for the task
2. Click the drop-down list box beneath “Who should do this?” to choose one person or click the [+ ] Multiple People option

3. Clicking the [+ ] Multiple People option, allows you to use check boxes to assign people to this task.

4. Click the “Save my changes” green button
Advanced Options and Editing

Advanced editing and extra options can be accessed by:

- Entering Edit Mode as described above, or
- Hovering over an existing task’s title to reveal option icons

Priority

When you hover over this option, a menu will appear to allow you to assign priority level.

- High being “do not disturb and hold tasks”
- Medium being “interrupt but other tasks will be delayed”
- Low being “interrupt and tasks may be delayed.”
Alerts

Clicking the bell icon allows you to add reminders to you or others for this task. Reminders can be sent via text or email.
Following Tasks

Following a task makes your daily report show the status of the task along with getting emails whenever certain actions or changes occur.

You can assign others to follow the task or just yourself.

Add followers or Follow

The particular actions or changes that interest can be selected.

Get all notifications
Get comments
Get status changes
No notifications (unfollow)

Commenting

Click the bubble icon to leave a comment on a task. This will notify the creator of the task and anyone following the task that there is a new comment from you.
Setting Privacy of Tasks

A task, if information-sensitive, can be set so others cannot see it.

1. Enter the Edit mode for the task
2. Click the lock icon
3. Select just you or the members of your team and click Done
Reporting

Reports for tasks are located in the left-hand pane.

You can choose a standard report (Task List Report) or a visual of the tasks (Gantt Chart).
Task List Report

When clicking for a Task List Report, you’ll be able to choose options on how you want the report to look and what is included in it.

To create a report just for your team, click on your team, and then click the Options button where you’ll see a Reports option.
Gantt Chart

When clicking for a Gantt Chart, you’ll be presented with an interactive interface.

![Gantt Chart Image]

<table>
<thead>
<tr>
<th>CBS Projects and Tasks</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBS Business Services-Ent.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview Business Officers...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CBS Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add tasks here</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Some Major Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Some Sub-Task for the Major Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Another Sub-Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Solutions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State of the College - Production</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Related Expenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RCM Tool Update</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RCM Tool Update</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USDA-OEKA REE Financial</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Some Major Task</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Excess Property</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Periodic Audits</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete required paperwork for federal...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add tasks to your team under Federal...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>