ACTIVITY GUIDE

teamwork.

Get Started: Fundamentals

Some of the things we'll cover:

- Identifying work (create projects)
- Planning workflows (create boards)
- Working together (add teammates)

Activity

1

What you'll do:

- Identify a project to put into Teamwork
- Create that project in Teamwork

Note:

You need to be a Teamwork admin or be a user with permission to create projects in order to create projects.

Step 1: Identify a project

The first step to creating a project is to...identify what work should constitute a project. Identifying projects happens naturally in day-to-day work, you just might not think about it in those terms.

For this exercise, choose upcoming work (i.e. a project) that:

Is a larger-scale objective you or your team need to accomplish.	Examples: An upcoming webinar, a quarterly audit, a non-retainer based project, a new website launch.
Is an objective with a start and end date.	Example: A webinar has concrete start and end dates. Work for a webinar starts and ends on particular days and on the end day you'll be able to say that the project is complete.
Has a clear owner. There is someone responsible for managing the work related to the project, identifying what needs to get done, assigning out work, and making sure the project stays on track.	Example: The person responsible for making sure a quarterly audit is done. There might be multiple people involved in completing the audit, but one key person is responsible for making sure everything gets done.

But wait...

We're discussing one way of thinking about projects in Teamwork. As you understand more about the different building blocks (projects vs. task lists vs. tasks vs. milestones), you'll find that there are many different ways to approach organization and project management.

There isn't a "right" way to do things, it's what works best for your team given the work you do and the way you work. The goal of this exercise is to start testing one way of doing things while actually getting work done.

Step 2: Create the project

Creating a project in Teamwork is really straightforward. Follow the steps on our Help Portal's Add a Project page to create a project from scratch. Things to keep in mind while you go through the project creation wizard:

Project creation workflow	• Choose the option to create the project from scratch. • Don't add categories, tags, or custom fields for now.
Best practices	• Choose a project name that is descriptive and short. You want to be able to read and quickly understand what the project is about. • Add anyone who should have access to the project. If you don't have others in your teamwork account yet, don't worry, you can always add people later.

Learn more about creating a project

Step 3: Create a task for each step

Create a task for each step (action item) that needs to be done in order to complete the project. Things to keep in mind while creating tasks:

Every step (action item) involved in the project's purview should have a task.	Example: If you're creating a new website, there should be tasks related to design, approval, building, review, and launch. You will probably have multiple tasks related to each of these areas!
Start task titles with a verb as often as possible.	Examples: Write email copy. Send a follow-up email. Create mock-up. You want to be as thorough as you can, but don't worry about forgetting something, you can always add more tasks in later (and you should!)

Tasks live on tasks lists, check out the next page for more details.

Learn more about creating a task

But wait...

What about task lists? Tasks lists are like file cabinets within a project and they're an excellent way to break up projects and to organize work. In this guide we're keeping things simple, so we're not going into creating multiple task lists, but we highly encourage you to start using them as you get more comfortable!

Learn more about task lists

Step 4: Assign all of the tasks you created

The assignee is the person responsible for completing a particular action item. Most likely, all tasks in a project will not be assigned to the project owner. You want to assign the person who will actually be doing that piece of work. This is an easy step that brings clarity and visibility into the project.

Learn more about assigning a task

Step 5: Add start and end dates to tasks

The start date is the date work should start on and the end date is the date that it should be completed by or on. Most, if not all, tasks should have dates.

[Learn more about adding start and end dates to a task]

Step 6: Add information in the description field

If you have details about what needs to be done (and/or how it should be done), add that information to the description field. This is also a great place to add any links related to a particular action item. Don't stress about this step, it's a good thing to do, but again, it doesn't need to be done all at once!

Learn more about description fields

That’s it, you’ve created your first project! There’s more to do, but this is an excellent first step.

Next:

- Return to the guided learning video or...
- Continue with Activity 2 on the next page if you're using this guide on its own.

Activity

2

What you'll do:

- Identify stages of work for your project
- Create a board for your project

Step 1: Identify stages of work

All work has stages, different types of work go through different processes, and every team has their own vernacular that they use when referring to how work progresses. The board view lets you track work through stages using exactly the terms your team actually uses.

What do we mean by work stages? It's the workflow that an action item goes through as it's being worked on.

Here are a few example workflows to help illustrate what we're talking about:

Generic Workflow	• New • In progress • In review • Complete • On hold • Canceled
Content Workflow	• New request • Accepted (not started) • In progress • In review • Complete • Published • Rejected
Design Workflow	• Backlog • Preparation • Design • Prototype • Development • Testing • Complete/Released • Canceled

Before creating columns on your board you need to identify what the columns should be (i.e. what are the stages that work goes through). Things to keep in mind:

You want enough columns that it's clear exactly what stage work is at, but not so many that it's overwhelming or that moving cards takes up more time than actually doing work. Essentially, anyone should be able to look at the board and understand the status of key tasks.

Start with something and you can always make changes later.
You can add, remove, and rename columns. This is a process.

You can use one of the workflows we've provided above!

Step 2: Create a column for each stage of work

This is the easy part, follow the steps outlined on our Help Portal to create columns on your board.

Learn more about creating columns

Step 3: Begin moving tasks into columns

You can do this by:

a) dragging-and-dropping tasks from the board view's backlog box onto a column

b) assigning a column using the table view's Board field

However, remember that assigning a work stage is an ongoing process. Task assignees should make updates whenever a task's status changes. Updating tasks is a small amount of data maintenance that creates transparency and lets you better manage and assess work.

But wait...

What if you want to use board columns for something else? That’s okay! You can use the board view and columns in whatever way best suits your team's needs. Using columns for work stages is just one way (albeit a very helpful way) to use columns.

Go Further! You can make your boards more powerful with triggers. For example, you can create a trigger to autocomplete a task when it’s moved to a particular column.

Learn more about autocompleting tasks with triggers.

Great job!

You now have a board to see how work is progressing.

Next:

- Return to the guided learning video or...
- Continue with Activity 3 on the next page if you're using this guide on its own.

Activity

3

What you'll do:

- Invite users to your Teamwork account (if you haven’t already)
- Add users to your project (if you haven’t already)

Invite teammates

You've done a great job setting up your project so far! You're almost ready to start completing tasks. To do that though, you'll need people to work with. Which means...it's time to invite your teammates into Teamwork so that you can assign work, see progress, and move work forward together.

1. Add any users who need access (and who you'll be working with) to Teamwork.
2. Add users to your project. You should add anyone to the project who will: be assigned to a task, need visibility into work happening, and/or need to provide information.

Learn more about inviting users to Teamwork

Learn more about adding users to a project

You’ve done incredible work so far and this is just the beginning. There’s more to explore and more projects to build.

Next:

Check out our Academy for more resources and keep: getting.things.done.