ACTIVITY GUIDE

teamwork.

Get Started: Streamline Work

Some of the things we'll cover:

- Identifying repeatable work (create a template)
- Leveraging templates (use a template)
- Gaining insights (use pre-built reports)

Activity

1

What you'll do:

- Identify a good project for a template
- Create a template based on that project

Note:

To create projects in Teamwork, you need to be a Teamwork admin or a user with permission to create projects.

Step 1: Identify repeatable work

The first thing you'll need to do is identify repeatable work that would benefit from a project template.

First: Identity work that would qualify as a project. Your company may have specific guidelines around what should be a project. We suggest work 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 can 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.

Second: It should be an objective that will need to happen more than one time (or at a regular cadence). For example, a family-owned restaurant could create a project for their restaurant's grand opening. They wouldn't need a template because they're only going to launch one restaurant, one time.

However, if the restaurant becomes a franchise (i.e. multiple restaurants will be opening), then a template would be helpful because the same set of steps will need to be followed for each opening.

Step 2: Create the project

Creating a project that you'll use as a template is really similar to creating a normal project. Our Help Portal has step-by-step instructions on how to create a project. Keep these things in mind as you work:

Create a task for each step needed to complete the project. Do this within the project itself.	• Every action item involved in the project's purview should have a task. • Try to start task titles with a verb. • Be as thorough as you can, but don't worry too much about forgetting something, you can always add tasks in later (and you should!)
Assign tasks	Just like with regular projects, you should assign out as many tasks as you can. For project templates, you want to add specific assignees if the same person will always be doing a particular task. You can also leverage the option to use a placeholder title. You'll be able to designate who should complete tasks assigned to that placeholder when you're launching the template.

Step-by-step instructions:
Create a project

Add start and end dates to tasks	Yes, it’s good to do this with templates too! When you launch a project from the template you’ll be able to readjust all dates in the project based on when the project should start or end.
Add helpful information in task description fields	The more detail you can add now, the less you'll have to do later.

Step-by-step instructions:
[Create a project]

Step 3: Save your project as a template

This part is really easy and takes just a couple of clicks. Follow the instructions on our Help Portal to save your project as a template.

Step-by-step instructions:
Save a project as a template

Congratulations, you just created a project template!

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:

- Launch a project from a template
- Delete the project (if it's not needed)

Step 1: Launch a project from a template

Once you’ve set up a template it's really straightforward to use — and therein lies the beauty of templates. As you’re launching your project you’ll be guided through a project launch wizard which prompts you to decide the project’s name, who should have access, and more.

Things to keep in mind as you're launching your project:

- You can always add more people, tags, and categories later, but the more you do at the creation stage, the less you'll have to do later.
- This is a great time to assign tasks! You'll be able to designate who should be assigned to tasks which you've put a placeholder assignee for.
- After you've launched a project from a template, it becomes a normal project and you can proceed with work as you normally would.

Step-by-step instructions:
Launch a project from a template

Step 2: Delete the project (if it's not needed)

We're just practicing and we don't want to clutter your Teamwork space unnecessarily. So, if you don't need the project you just launched, go ahead and delete it.

Step-by-step instructions:
Delete a project

Great job, you launched (and deleted) a project!

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:

- View reports in Teamwork

Step 1: Open Project Health reports

Project Health reports show all projects you're an admin on (or all projects if you're a Teamwork admin). To view reports: navigate to the Reports section within Teamwork and select the Project Health tab.

Make sure that you're an admin on any projects you want to see on this tab. Then, as work is done, use this report to monitor overall project progress.

Learn more about Project Health reports

Step 2: Open Planned vs. Actual reports

Just like with Project Health reports, Planned vs. Actual reports show all projects you're an admin on (or all projects if you're a Teamwork admin). To view reports: navigate to the Reports section within Teamwork and select the Planned vs. Actual tab.

You can start customizing what you see on this view now by adding and removing columns from the report and you'll see data automatically added as there is data to show.

Learn more about Planned vs. Actual reports

Excellent, you’ll be ready to leverage reports as your team starts using Teamwork (if you’re not there already!).

Next:

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