

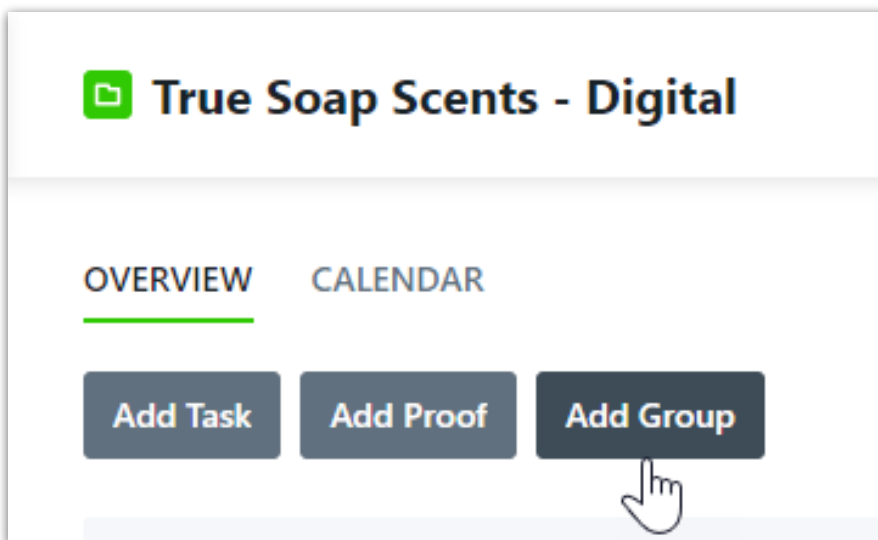
# Project Work Groups

Published on 01/27/2022

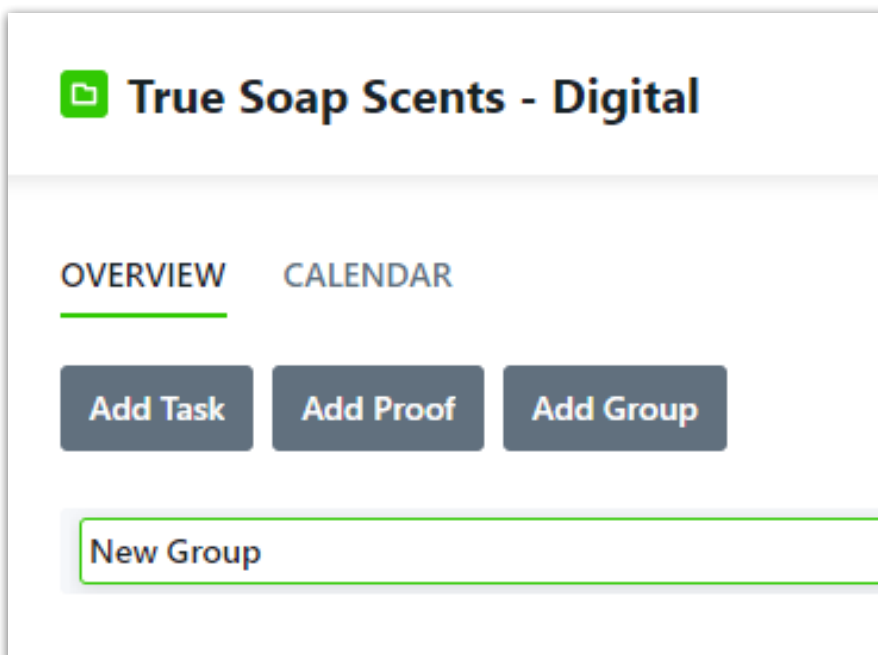
Work groups allow you to categorize your project work in a way that is intuitive and easy to manage. With work groups, project managers can take the complexity out of project schedules by creating groups that represent project phases, deliverables, teams, or whatever categories make sense for the project at hand.

## Creating a Work Group

Navigate to the relevant project details page. Under **Overview**, click **Add Group**.



Edit the group name and click outside the field to save.



Directly beneath the group name, click '**Add a task...**' and begin typing your task name. Press return on the keyboard to save your task.

## True Soap Scents - Digital

OVERVIEW

CALENDAR

Add Task

Add Proof

Add Group

Concepting

Add a task...

Repeat this step until any tasks relevant to the group are added.

## True Soap Scents - Digital

OVERVIEW

CALENDAR

Add Task

Add Proof

Add Group

Edit Blockers

Concepting



✓ Scent Names

To Do



✓ Identify Color Palettes

To Do



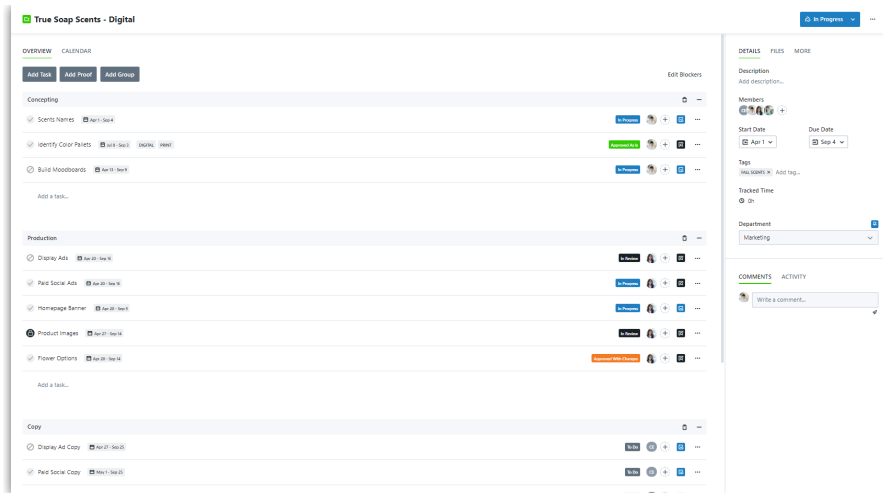
✓ Build Moodboards

To Do



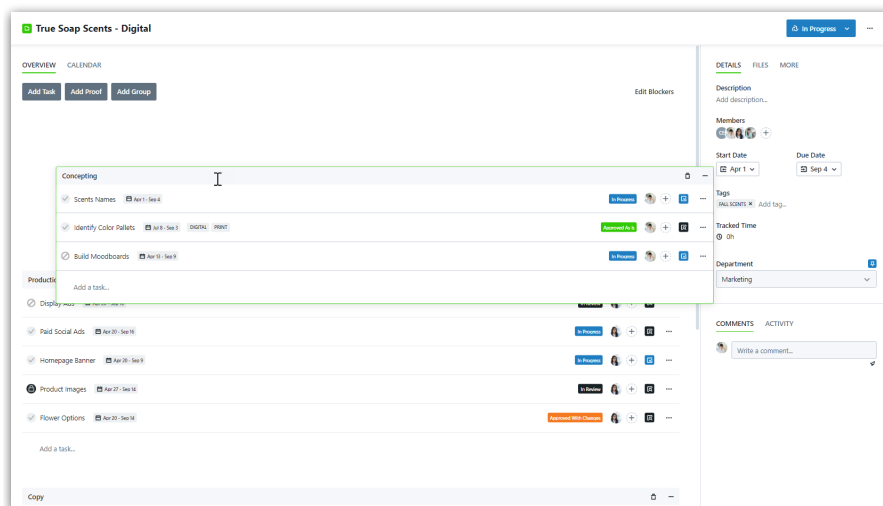
Add a task...

Add multiple groups and subsequent tasks or proofs to manage projects with larger scopes.



## Organizing Work

You can reorder tasks and proofs as well as entire groups at a time by dragging the work group header or work item.



You can also collapse and expand work groups as necessary to view your project work in whatever arrangement benefits you most at the time.

True Soap Scents - Digital

OVERVIEW CALENDAR

Add Task

Add Proof

Add Group

Edit Blockers

Concepting

+

Production

-

Display Ads

Apr 20 - Sep 16

In Review

+

...

Paid Social Ads

Apr 20 - Sep 16

In Progress

+

...

Homepage Banner

Apr 20 - Sep 9

In Progress

+

...

Product Images

Apr 27 - Sep 14

In Review

+

...

Flower Options

Apr 20 - Sep 14

Approved With Changes

+

...

Add a task...

## Duplicate Work Groups

Cut down on repetitive work when creating similar Work Groups by duplicating! Click the actions menu to the right of the Work Group and select Duplicate.

OVERVIEW CALENDAR

Add Task

Add Proof

Add Group

Edit Blockers

Copy

...

-

Copy for Twitter Posts

To Do

1h

...

Copy for Instagram Posts

To Do

1h

+

...

Copy for Facebook Posts

To Do

Day -11 - Day -9

1h

+

...

Copy for Digital Ads

To Do

Day -9 - Day -8

1h

+

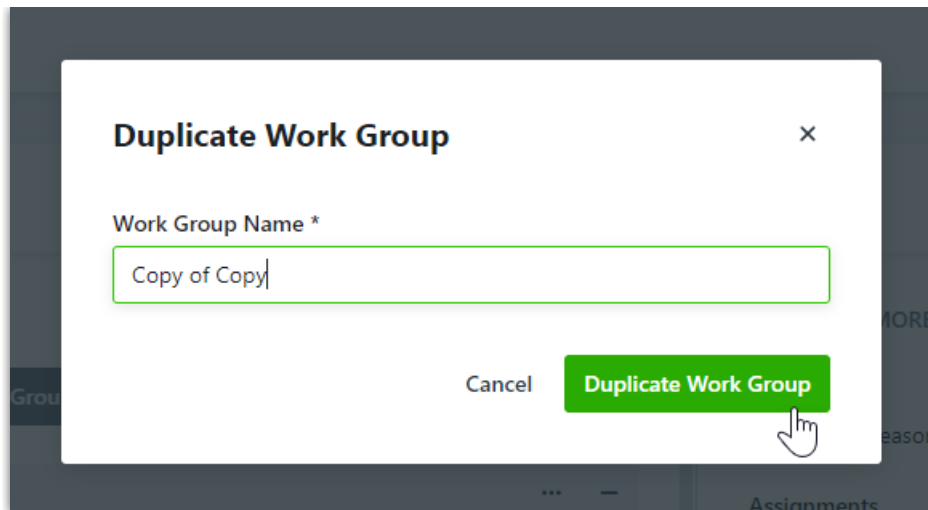
...

Duplicate

Delete

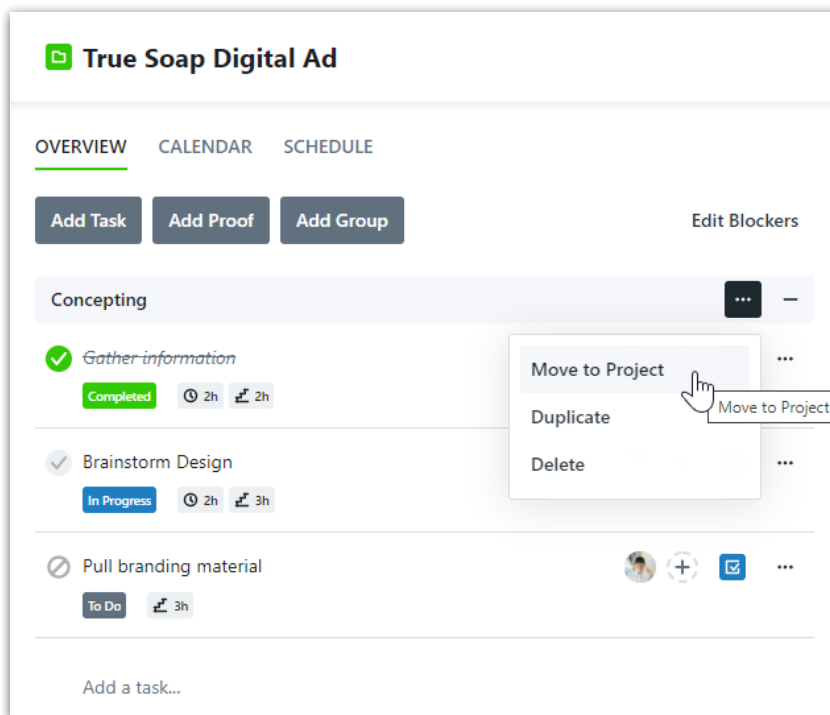
Duplicate

Create a name for the new work group and select **Duplicate Work Group**.




## Move Work Groups to Other Projects

Work groups can be moved between projects. To move a work group to another project, click the actions menu to the right of the work group and select **Move to Project**.



Select from the existing projects to move your work group to. The work group will then be removed from the current project and relocate to the chosen project.


**True Soap Digital Ad**

OVERVIEW

CALENDAR

SCHEDULE


Add Task

Add Proof

Add Group

Edit Blockers


Concepting



Gather information

Completed


2h 2h



Brainstorm Design

In Progress

2h 3h



Pull branding material

To Do

3h

Add a task...


Move to Project

Duplicate

Delete


Move to Project

Inside the chosen project, the work group will appear below existing work groups and maintain all of the previous information and statuses. Users will receive notification of their assignments to the new project if they were not previously members.


**True Soap Email Blast**


In Progress

Close Project



Upload final file to project file & mark as deliverable

To Do




Close and archive project

To Do

Add a task...


Concepting



Gather information

Completed


2h 2h



Brainstorm Design

In Progress

2h 3h



Pull branding material

To Do

3h

Add a task...

DETAILS

FILES (1)

MORE



Project Number

08

Description

Add description...

Members

+

Priority

Add Priority

Start Date

Add Start Date

Due Date

Add Due Date

Tags

DIGITAL DESIGN X SPRING SCENT X

Add tag...

Level of Effort

8h

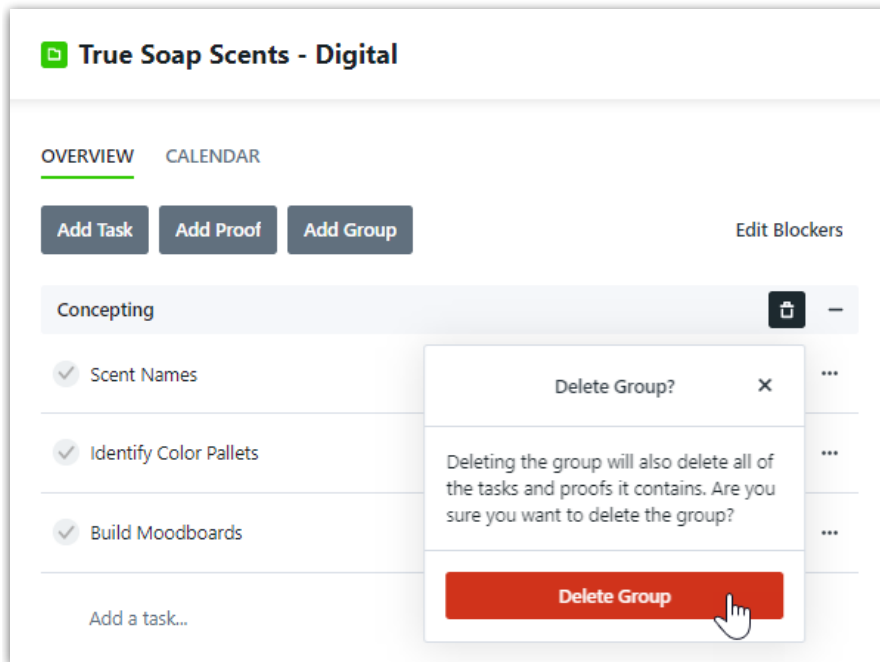
Tracked Time

12h

## Deleting a Work Group

© 2019 inMotionNow, Inc. - All Rights Reserved

To remove a work group and all related tasks or proofs, click the **Trash** icon to the right of the group name. Click **Delete Group** to confirm your selection.



The screenshot shows the 'True Soap Scents - Digital' workspace in the inMotion application. The 'OVERVIEW' tab is active, displaying a list of tasks under the 'Concepting' group. A modal dialog titled 'Delete Group?' is open, warning that deleting the group will also delete all tasks and proofs it contains. A red 'Delete Group' button is highlighted with a mouse cursor.

**True Soap Scents - Digital**

**OVERVIEW** CALENDAR

Add Task Add Proof Add Group Edit Blockers

Concepting

- ✓ Scent Names
- ✓ Identify Color Pallets
- ✓ Build Moodboards

Add a task...

**Delete Group?**

Deleting the group will also delete all of the tasks and proofs it contains. Are you sure you want to delete the group?

**Delete Group**