Project Partners

User Guide

Project Partners

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What is a Project Manager

A project manager is one who organizes, plans and executes projects.

A project manager can be a DIY (Do-It-Yourself) homeowner, contractor, IT professional or anyone responsible for managing a project, no matter how big or small.

If you are a homeowner and like to take control of your home improvement projects, then you are a project manager.

You plan your project and its budget, then organize the needed elements and resources and then execute to a finished product.

If you are a contractor and work with clients and projects, then you are a project manager. You bid jobs, organize resources and complete the job.

In this User Guide, we are going to focus on a DIY home improvement project. We are going to do a small guest bathroom remodel.

In the following pages, you will learn how to set up the project, plan and organize the tasks & resources and execute the project to its completion.

Home Page

Your Home Page is where you see a list of To-Do Items that you may have and a list of Tasks that are assigned to you.

As a new registered user, you will not have any To-Do Items or Tasks and your Home Page will look something like this:
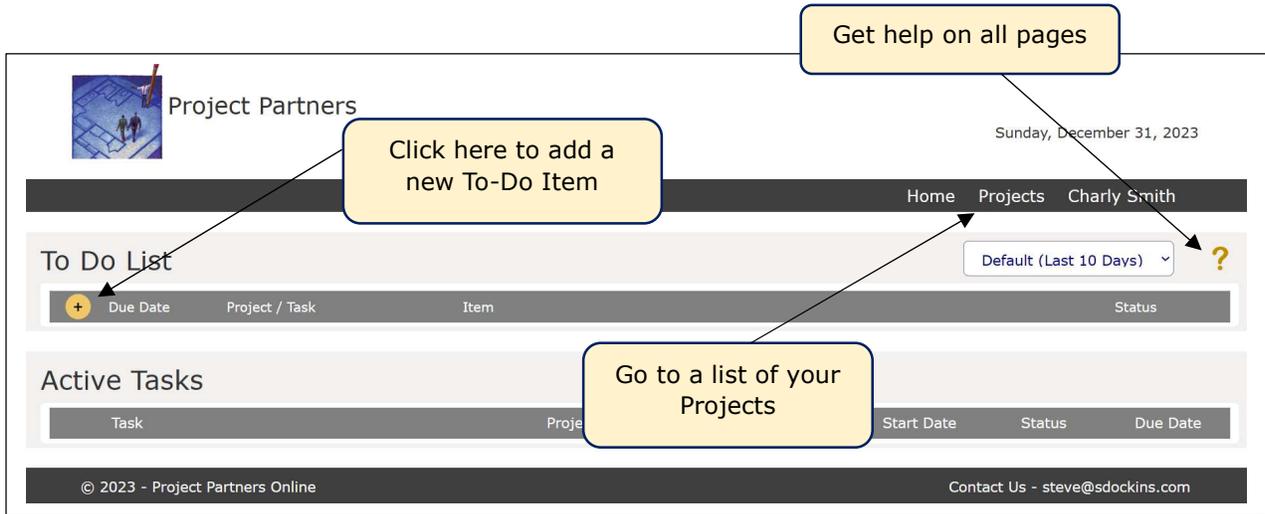
It is simple to add To-Do Items. Just click the 'Add New To-Do Item' button and fill in the short form. There are dropdown select fields for selecting the Project or Task that the To-Do Item might belong to, however if you do not have an active project or you just want to add a misc. or general item, then select 'General' in these fields.

Once you have added an item you can edit it by clicking the 'Edit' icon on the list.

The 'Auto Alert' switch indicates if it is On or Off. It is on by

default when you add new To-Do Items. That means you will receive a notice

either by email or text when your To-Do Item is within 1 day of being due or it is late. Just click the switch to turn it Off or On.

The Tasks section indicates the active incomplete tasks that have been assigned to you by the project manager. If you are the project manager and have assigned yourself tasks, then they will show up here.

You can go directly to a Task by clicking the green GO button on the left side of the Task name.

Click to go directly to this task

Main Menu

The illustration below is your simple menu where you navigate to your Profile by clicking your name or go to your list of Projects by selecting the Projects link. Home will take you back to your Home Page.

If you open your profile, you have an opportunity to modify it or log out of the app. If you are a project manager, you have the option to upload a logo if you would like. The logo will be illustrated on certain generated reports.

Project List & Set Up

Click on '**Projects**' to take you to a Project List page contains a list of all your projects. If you have not started one yet you will see a page that indicates that you have no projects and gives you the option to start a project by clicking the 'Add New Project' button.
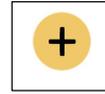
This dialog is where you will set up your new Project. For this example we are setting up the project called:

'**Guest Bathroom Remodel**'

Create a New Project	X

Guest Bathroom Remodel

Remove and install a new vanity with sink and hardware in the guest bathroom.

Home Improvement

Ann Dickson

25473 Rancho Niguel Rd

Laguna Niguel | CA

92677

1/14/2024 | 1/31/2024

Not Started

Create New Project

Enter Project Name

Enter a Description of your Project

Enter Type of Project. This can be anything that makes sense to you

Owner Name and Project Location

The large field allows you to describe your project in a longer form and maybe point out some distinguishing properties of the project.

Enter a 'Project Type' that makes sense to you. This could be a Home Improvement, or a Custom Home', Home Remodel, Software Development, etc.

Fill in the fields for your project location and then select your estimated 'Start and Est. Completion Dates'. You can adjust these later if needed.

The last field is your Project Status. Once you have started you should change this to 'In Progress'.

Once your project is saved you will see your new project in the list of projects.
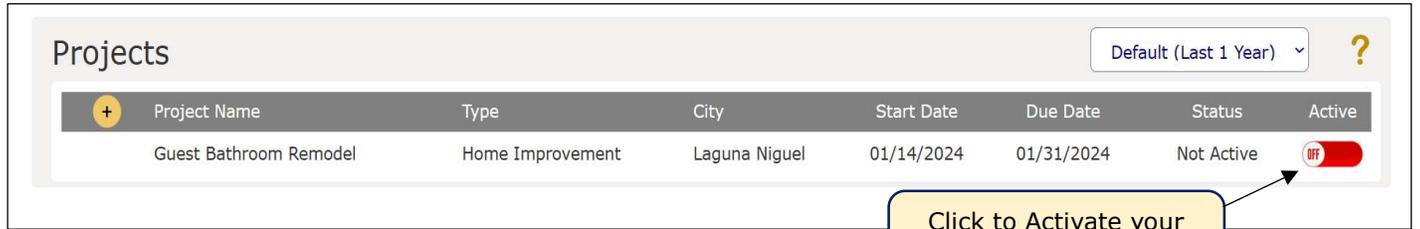
Projects						Default (Last 1 Year) ⌄	?
+ Project Name	Type	City	Start Date	Due Date	Status	Active
Guest Bathroom Remodel	Home Improvement	Laguna Niguel	01/14/2024	01/31/2024	Not Active	OFF

Click to Activate your Project

Depending on how you became a Project Partner, you will either have an Activation Code or you will need to purchase one for only $19.00.

We use the Paypal Secure Payment method which is safe and secure and used worldwide.

Enter the 'Activation Code' and click the 'Activate Project with Code' or click the 'Activate Project with Purchase' and go through the secure Paypal dialog to activate your project.
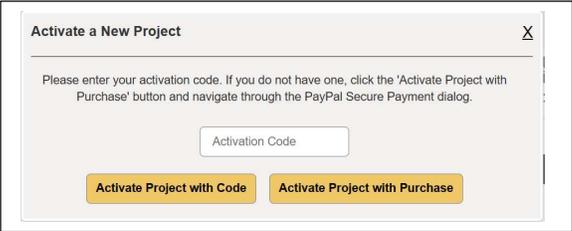
Activate a New Project   X

Please enter your activation code. If you do not have one, click the 'Activate Project with Purchase' button and navigate through the PayPal Secure Payment dialog.

Activation Code

Activate Project with Code   **Activate Project with Purchase**

Once you have activated your project your project list will now look like the following.

Projects						Default (Last 1 Year) ⌄	?
+ Project Name	Type	City	Start Date	Due Date	Status	Active
GO Guest Bathroom Remodel	Home Improvement	Laguna Niguel	01/14/2024	01/31/2024	Not Started	ON

Click this GO button to go to your project Main Page

Project Page

The project page is your control center. It is laid out so that you can easily view summaries and details about the Project and its Tasks, Notes, Images, Reports and Documents. Managers can edit and add elements to the project and communicate to project members by clicking on the various section icons.

The '**Quick Start**' icon allows you to add several project Tasks at a time. This is a handy way to start your project. It also allows you to set up your estimated costs and timelines so you have a basis for your budgeting and time frames.

Tasks are the heart of a project. All projects have tasks and each task should be declared as a specific element or action required within the scope of the project.

Your tasks should be laid out in order of action, for example, if you are remodeling your bathroom you will need to purchase a vanity before you install it. Therefore the 'Purchase Vanity' task would have a start date and due date earlier than the 'Install Vanity' task.

Of course, there will most likely be Tasks in between these two Tasks, such as moving plumbing or patching & painting drywall. So, to make this example more real we will add those Tasks in between and a final clean up Task at the end.

Set up Tasks and Budgets

Insert up to 8 Tasks with hours, costs and start time into your project. If you need more, you can repeat this process once you have saved this batch. Once saved you can go to your tasks and add the additional information and manage their notes, images, etc.

Task Name	Est. Hours	Est. Cost	Start Date
Purchase Vanity	3	900	01/15/2024
Move Plumbing	5	450	01/21/2024
Patch & Paint Drywall	4	30	01/25/2024
Install Vanity	5	0	01/29/2024
Final Touch up, Caulking, Painting & Cleaning	2	50	01/31/2024
	0	0	
	0	0	
	0	0	
	19.00	1,430.00	

Calculate   **Save New Tasks**

After saving your tasks you will see them appear in the Task list at the bottom of your Project Page. Any Tasks assigned to you that is not complete will also show up on your Home page.

Since these Tasks were install through the 'Quick Start' method, they are all assigned to the Project Manager. The following section will show you how to set up 'Project Members' that will enable you to edit your Tasks and assign them to the proper 'Task Manager'.

Project Tasks

+	Task	Go to Task [assigned To]	Status	Start/Due Date	Hours	Charges
GO	Purchase Vanity	SDockins Consulting steve@sdockins.com	Not Started	01/15/2024 01/15/2024	3.00 0.00	$ 900.00 $ 0.00
GO	Move Plumbing	SDockins Consulting steve@sdockins.com	Not Started	01/21/2024 01/21/2024	5.00 0.00	$ 450.00 $ 0.00
GO	Patch & Paint Drywall	SDockins Consulting steve@sdockins.com	Not Started	01/25/2024 01/25/2024	4.00 0.00	$ 30.00 $ 0.00
GO	Install Vanity	SDockins Consulting steve@sdockins.com	Not Started	01/29/2024 01/30/2024	5.00 0.00	$ 0.00 $ 0.00
GO	Final Touch up, Caulking, Painting & Cleaning	SDockins Consulting steve@sdockins.com	Not Started	01/31/2024 01/31/2024	2.00 0.00	$ 50.00 $ 0.00

The '**Project Members'** icon will show you the current members and their roles that you have set up in the project. You can add a new member by clicking the 'Add New Member' button at the bottom of the pop-up.

Every project has project members. When you want to assign a task or give access to an owner/user, that individual or company must be a member of the project. Adding new members is simple and easy.

Project Members   X
_____

The following is a list of members for this project.

Charly Smith   charly@smid.com   Task Manager
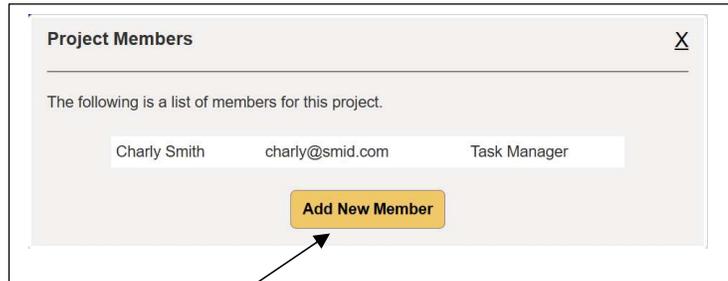
Add New Member

When you click on the 'Add New Member' button you will see the following dialog with a prompt asking if you would like to see if the individual or company is already in the system. It is possible or likely that you have already entered the individual or company for a different project. To check, simply enter the email address of the

Project Members   x
_____

The following is a list of members for this project.

Charly Smith   charly@smid.com   Task Manager

Register a project member for this

We can check to see if the new project member is already in the email address for him/her. If the email is present we will show y choose to add him/her to your project. If not you can complete th him/her to the project.

[Email Address]   🔍

You can add as many members as you need. Owner/Users are those individuals or companies that own the property or the object of the project, or those that have equal access as the owner. They have limited use and cannot edit or add data to the project. If you want your Owner/User to be able to carry out task assignments, then you must also add the individual or company as a 'Task Manager'.
All other members will be assignees for managing individual tasks called Task Managers.

Is this an Owner/User? ☐

[First Name]   [Last Name]
[Company]
[Address]
[City]
[County]   [State]   [Zip Code]
[Phone]

Save New Member

Check to see if the new member is already in the system

Check this box if the new member is an Owner/User

individual or company and the system will return a result. If the user is in the system, you will be asked if you would like to assign the user as an owner/user or task manager. Make your choice by selecting the appropriate button and the user will be added as a member of the current project.

If the user is not in the system, you will be asked to continue with the registration form and then save the new member.

NOTE: It might be beneficial to add several members in the beginning of your project if you know they will be involved. That way when you start adding or editing your tasks there will be members available. **If you as the Project Manager will be doing Tasks, then you must also add yourself as a Task Manager.**

Clicking the '**Map**' icon will open a Google map to your project location in a new window or tab. Simply close the tab when you are finished.

Map It

Edit your Project by clicking this icon. You will see a screen that will allow you to make changes or corrections. You may need to extend your Start Date or the Due Date or change the Status of your project.

When you are finished editing, just click the 'Save Changes' button at the bottom and your changes will be saved.

Select your project status using this dropdown

Edit this Project   X

Name: Guest Bathroom Remodel

Remove and install a new vanity with sink, hardware and countertop.

Type: Home Improvement

Property Owner: Ann Dickson

Address: 25473 Rancho Niguel Rd

City: Laguna Niguel   State: CA   Zip Code: 92677

Start Date: 1/14/2024   Due Date: 1/31/2024

Status: Not Started

Not Started
Assigned
In Progress
Delayed
Suspended
Complete

Save Changes

Some items are not changeable from this screen. The 'Hours' and 'Costs' are governed by the sum of your Tasks hours and costs. The 'Percent Complete' is calculated by the Start Date and Due Date.

Status:	Not Started	Due Date:	01/31/2024	Percent Complete:	0.00%
Start Date:	01/14/2024	Est. Hours:	19.00	Est. Cost:	$ 1,430.00
Complete Date:	Not Complete	Acutal Hours:	0.00	Actual Cost:	$ 0.00

The row of Folders in the center of the screen contains the different data and information screens for the project. Each area or section may or may not allow you

TASKS   NOTES   DOCUMENTS   IMAGES   REPORTS   GRAPHS
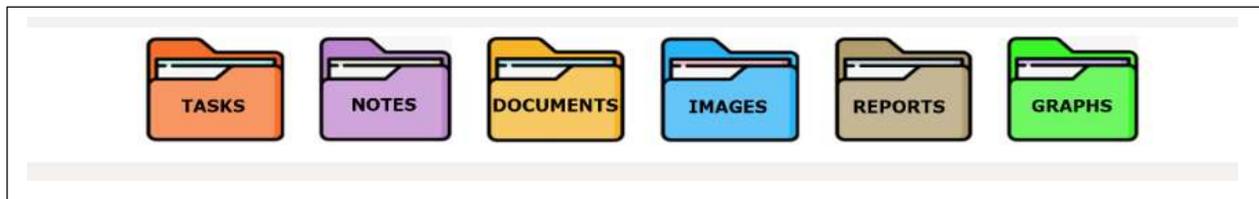
to add and update information. For example, you cannot add or update Reports and Graphs. These are for viewing or printing only.

Project Tasks make up the heart of your project. Tasks are action items that are required to be completed within certain time frames. Clicking on this folder will open the list of tasks that have been installed in your project. This folder opens by default when you enter the Project Page. See more about tasks in the Tasks section of this guide.

Project Notes are specific to the project. You can enter notes about the project and even insert an image to go along with the note. As you have seen To-Do Items also have notes and you will learn about Task Notes as well. It is important to try to keep each note strictly related to the parent or owner of the note, IE: In this case this note belongs to the Project and not a Task or To-Do Item, so Project is the parent or owner of the note.

Click to view note image

Project Notes

Add a new Project Note

	Date	Entered By	Note	Image
+				
✏	01/04/2024	Charly Smith	Ensure that the bathroom is kept clean throughout the project and no tools or supplies are left in the room.	Guest Bathroom

Edit this Project Note

Project Documents are specific to the project the same way Notes are. Your project may contain contracts and agreement with an owner or there may be on-going addendums and change orders that are strictly related to the project. This is where you would upload these types of documents. These must be a PDF file type.

Delete this document

Project Documents

	Date	Name or Description	Task	Document	Delete Item
+					
	01/04/2024	Vanity Receipt from Home Depot	Purchase Vanity	📄	✗

View this document

Since this is a DIY and the project manager is the homeowner, we most likely will not have project specific documents.

Your Tasks will also contain a documents folder for Task Specific documents and this list on your project page contains those documents from your Tasks, so that you have an overall view of all of the documents involved in your project.

In the example above you see a document that belongs to the 'Purchase Vanity' Task. If the document were a Project specific document there would be no associated Task to display.

Project Images like Documents are specific to the overall project and not a Task or note. You may want to insert 'before' and 'after' images or possible problems that may restrict certain elements of your project.

Project Images

+	Date	Name or Description	Task	Image	Delete Item
	01/04/2024	Finished Guest Bath Remodel		🖼️	✗

View this image

As with Documents, the list of project images also includes any images that belong to tasks. The illustration above shows an image that is project specific and no task is identified.

Project Reports are system generated and cannot be modified or removed by the user. The 'Project Summary' report is a real time up-to-date summary of all aspects of the project and used for documenting progress or a final project report. Other report will continue to be added.

Project Graphs currently generates a real time Gantt Chart, which is a visual review of the Project and time lines. It is typically used as an overall view of how your Tasks are progressing and how they overlap in their timeframes.

Gantt Chart

	2024																				
	January																				February
	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2
	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F
Purchase Vanity				M...																		
Move Plumbing										M...												
Patch & Paint Drywall													M...									
Install Vanity																	Mediu...					
Final Touch up, Caulking, Painting..																		M...				

↑ 1 of 1 ↓ 🕐 ⇤ ← ⚪————— → ⇥ + −

Task Page

Tasks are the heart of a project. All projects have tasks and each task should be declared as a specific element or action required within the scope of the project.

Task pages are laid out similar to your project page, they have similar fields and properties, such as a Start Date and Due Date. They have Est. Hours and Costs and Act Hours and Costs that transfer up to your project page as a summary of all Tasks.

The project manager can send a notice of this task to the Task Manager by clicking here

Purchase Vanity
Task Manager: Charly Smith

Home   Projects   Charly Smith

Guest Bathroom Remodel   ?
Project Manager: Charly Smith

Priority:	Medium	Status:	Not Started	Due Date:	01/15/2024	Percent Complete:	0.00%

Edit this Task

Start Date: 01/15/2024   Est. Hours: 3.00   Est. Cost: $ 900.00
Complete Date: Not Complete   Acutal Hours: 0.00   Actual Cost: $ 0.00

View Project Details

TO DO   NOTES   DOCUMENTS   IMAGES   REPORTS

Task To-Do List

+	Due Date	Item	Status	
	01/15/2024	Measure space for width and height of vanity	☐	X
	01/16/2024	Choose color and style from samples	☐	X
		We found what we wanted at the Home Depot website		

If you are the Project Manager, you will be taken back to the Project Page when you click on the project name on the upper right side. If you are not the project manager, you will see a pop-up with some details of the over-all project.

Edit your task by clicking the 'Edit Icon' and making changes to the various fields. However, Task Managers are not able to change the 'Task Manager'. Either user can elect to turn 'Auto Alerts' On or Off, by simply clicking the switch.

There is a Calculator at the bottom left that you can use to calculate costs and other things necessary for this task.

Your Costs should include ALL costs of material, labor and any contracted work.

Edit this Task   X

Turn 'Auto Alert' On or Off

Auto Alert OFF

Purchase Vanity

Enter a meaningful description

Task Manager: Charly Smith
Priority: Medium
Start Date: 1/15/2024   Due Date: 1/15/2024
Status: Not Started
Estimated Hours: 3.00   Actual Hours: 0.00
Estimated Costs: 900.00   Actual Costs: 0.00

Click to use Calculator

Save Task Changes

To-Do Items keep you organized and on top of the time frame in your Task. To-Do Items are certain things that need to be done to complete your Task. The To-Do folder is the default folder on your task page and will open upon entering the page.

Task To-Do List

	Due Date	Item	Status	
✏️	01/16/2024	Choose color and style from samples	☐	✗
		We found what we wanted at the Home Depot website		
	01/15/2024	Measure space for width and height of vanity	☑	✗

Click when task is completed

Edit To-Do Item to add a Note

To-Do Items that are not complete will show up on your 'Home Page'.

Task Notes are specific to the task. You can enter notes about the task and even insert an image to go along with the note. As you have seen Projects and To-Do Items also have notes. It is important to try to keep each note strictly related to the parent or owner of the note, IE: In this case this note belongs to the Task and not a To-Do Item, so this Task is the parent or owner of the note.

Task Notes

	Date	Entered By	Note	Image
✏️	12/31/2023	Charly Smith	We found what we wanted at the Home Depot website	Vanity

Click to view image

Edit Note

Task Documents are specific to the task. You may have a receipt for the vanity that you want to keep together with this project. You can upload a PDF file into the folder and view or print it as needed.

Task Documents

	Date	Name or Description	Document	Delete Item
	01/04/2024	Vanity Receipt from Home Depot	📄	✗

Click to view document

Click to delete document

You cannot edit a document; however, you can delete it from the Project by clicking the Red X at the far-right side.

Whether you are a DIY or Contractor project manager or the subcontractor, you may want to upload your contract or proposal and agreement into the appropriate Task folder.

Task Images like Documents are specific to the Task and not a To-Do Item or Note. You may want to insert a picture of the cabinet you are buying to keep it with the project.

Task Images

+	Date	Name or Description	Image	Delete Item
	01/05/2024	Home Depot Vanity		

Click to view image

Click to delete image

Task Reports are system generated and cannot be modified or removed by the user. The 'Task and Notes' report is a real time up-to-date summary of all aspects of the Task and used for documenting progress or a final report. Other report will continue to be added.

Task Reports

Name or Description	Show HTML	PDF
Task and Notes		

Click to open in either HTML or PDF