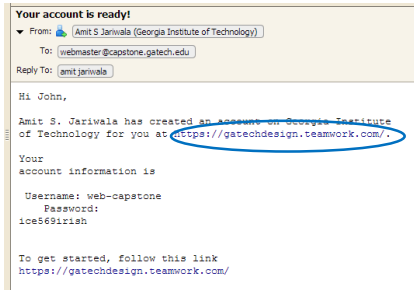


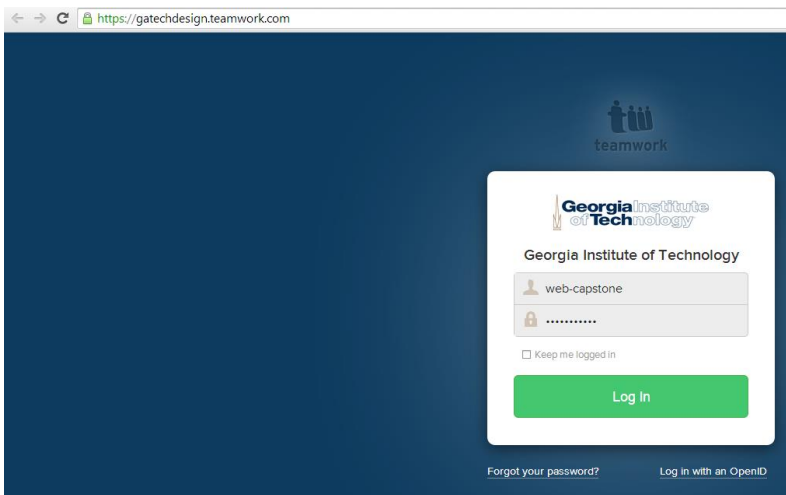
Startup Guide to using TeamWork.com for students

(The following is an illustrative example only. Task planning and naming used in the example below is merely for the sake of showing a sample example and by no means suggested or recommended for the course. Please consult your faculty instructor for guidance on project planning.)

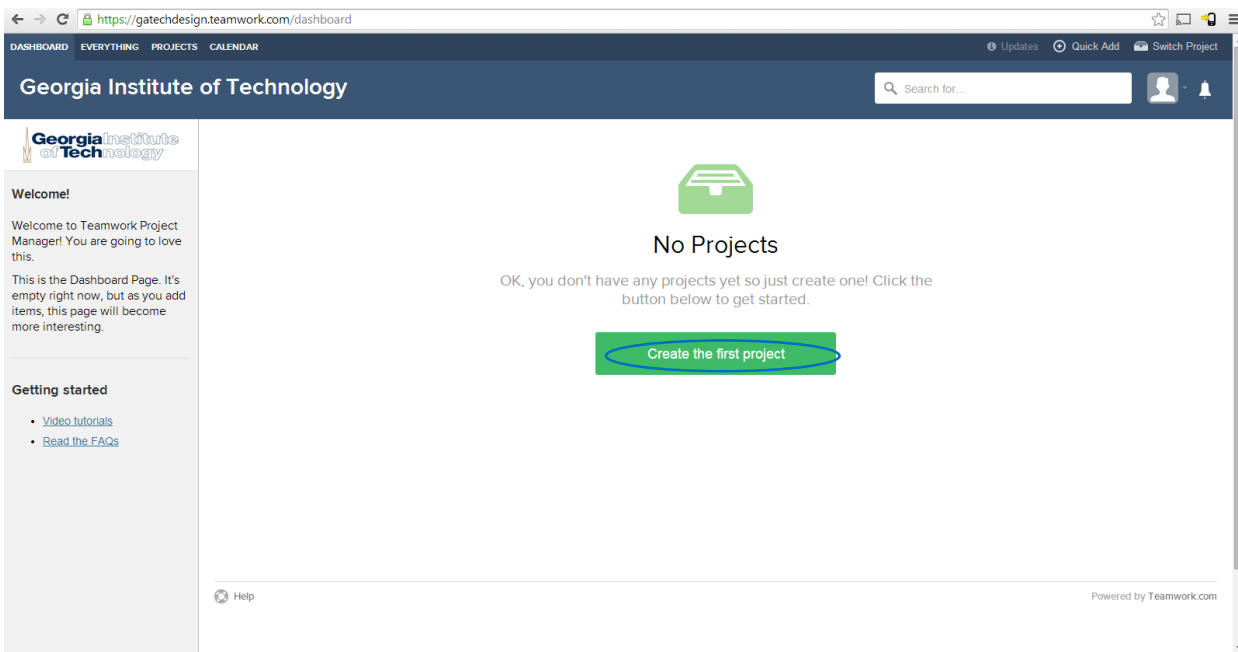
1. Check the welcome email (You must have been added you to the TeamWork.com site. If not, please inform your TA or faculty instructor).



2. Login the site



3. Only ONE administrator per team needs to create a project



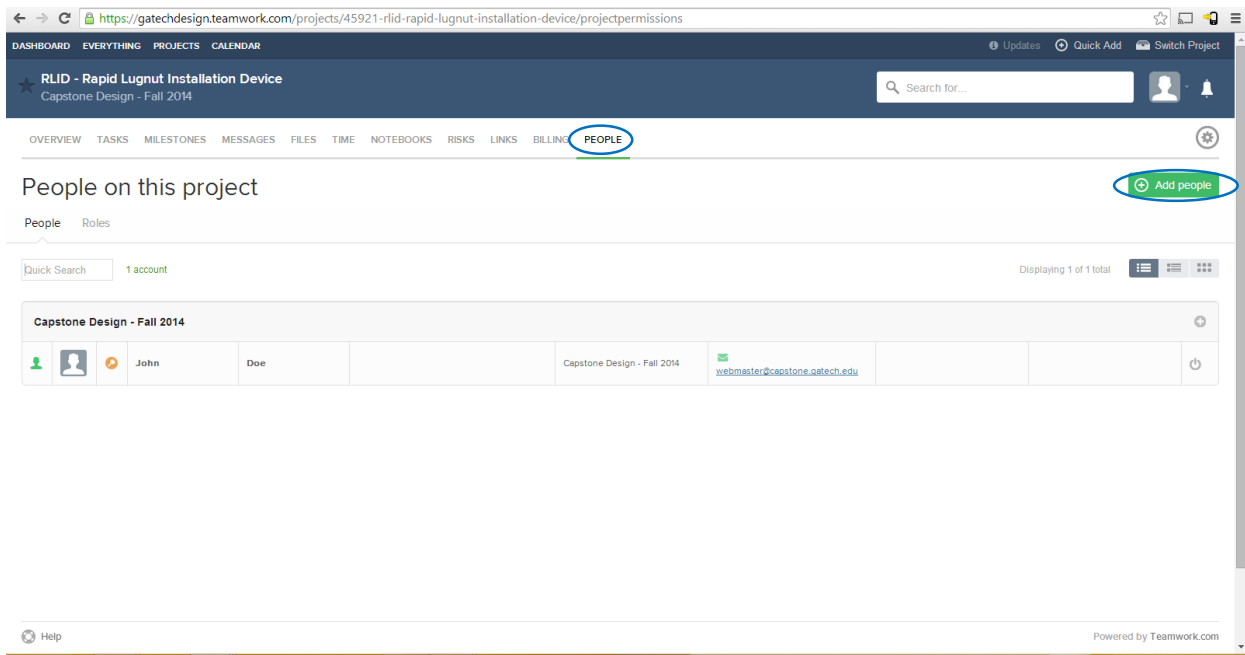
4. a. Specify project basics (You may specify start and end dates of the project and change other settings from other tabs)

The screenshot shows the Georgia Institute of Technology Teamwork Project Manager dashboard. A modal window titled "Add project" is open. The form has two tabs: "Description" (selected) and "Features". The "Name the project" field contains "RLID - Rapid Lugnut Installation Device". The "Provide a description (Optional)" field contains "This project is sponsored by ABC and the primary goal of the project is blah blah blah...". At the bottom of the modal, there are two buttons: "Add project" (highlighted with a green circle) and "Cancel".

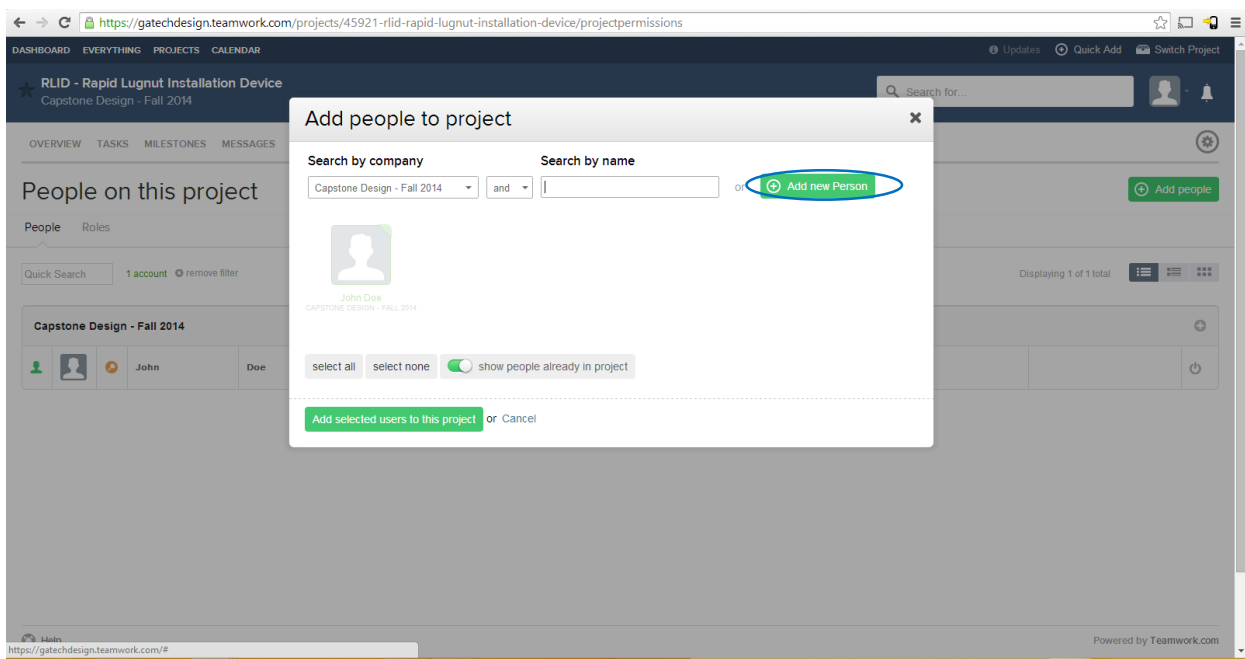
- b. Click More(Tab) -> Category -> Semester(Fall2014) -> School or GT4823(dependent on your major/section)

The screenshot shows the Georgia Institute of Technology Teamwork Project Manager dashboard. A modal window titled "Add project" is open. The form has four tabs: "Description", "Features", "Category" (selected), and "Dates". The "Name the project" field contains "RLID - Rapid Lugnut Installation Device". The "Category" dropdown menu is open, showing a list of categories: Research, Fall 2014, ECE, GT4823, ME, MSE (highlighted with a green circle), PubP, Summer 2014, and ME. The "Add category" button is at the bottom right of the dropdown.

5. You may create a task list now (refer #6) or simply invite your team members to the group and add the tasks later
- a. Invite team members from the “People” tab



- b. You can search for students from the class and invite them directly. Repeat until all your team members are added. Also, add your instructor to your project as well!



- c. OPTIONAL - Invite your project sponsor or external mentor to your group by clicking on “Add new person” (You may ask your mentor for the preferred user login name, if they are interested to have access to your group page on TeamWork.com)

Add User

Essentials Details Address Profile Social Localization Permissions Preferences

Name*
First Name Last Name

Email*
eg. john@company.com

Company

Job Title

Type ⓘ ☒ Account or ☐ Contact

User Login*
Choose something that will be easy to remember

Password

Send Email ☒ We will send a "Welcome" email to this user.

[Advanced Options](#)

6. You may create a task list now

<https://gatechdesign.teamwork.com/projects/45921-rlid-rapid-lugnut-installation-device/tasks>

DASHBOARD EVERYTHING PROJECTS CALENDAR

RLID - Rapid Lugnut Installation Device
Capstone Design - Fall 2014

Search for...

Filter by user
All users

Task lists
No active lists

Reports
Task lists report
Gantt chart export...
Gantt chart

OVERVIEW **TASKS** MILESTONES MESSAGES FILES TIME NOTEBOOKS RISKS LINKS BILLING PEOPLE

No Task Lists

Hey John, you don't have any task lists for this project just yet.
Click the button below to create your first task list.

Help

Powered by Teamwork.com

a. Specify name for the task list

DASHBOARD EVERYTHING PROJECTS CALENDAR

RLID - Rapid Lugnut Installation Device
Capstone Design - Fall 2014

Filter by user
All users

Task lists
No active lists

Reports
Task lists report
Gantt chart export...
Gantt chart

OVERVIEW TASKS MILESTONES

Hey John, you don't have any task lists for this project just yet.
Click the button below to create your first task list.

Create the first task list

Powered by Teamwork.com

New task list

Give the list a name (eg. "Changes to layout" or "Bug fixes / typos")
Report writing and presentation

Notes Privacy Milestone Advanced

Do you have any notes for this list? Enter them here:
This task deals with drafting project reports for the class

Add this task list Cancel

b. Make your task list a part of the project milestones

DASHBOARD EVERYTHING PROJECTS CALENDAR

RLID - Rapid Lugnut Installation Device
Capstone Design - Fall 2014

Filter by user
All users

Task lists
No active lists

Reports
Task lists report
Gantt chart export...
Gantt chart

OVERVIEW TASKS MILESTONES

Hey John, you don't have any task lists for this project just yet.
Click the button below to create your first task list.

Create the first task list

Powered by Teamwork.com

New task list

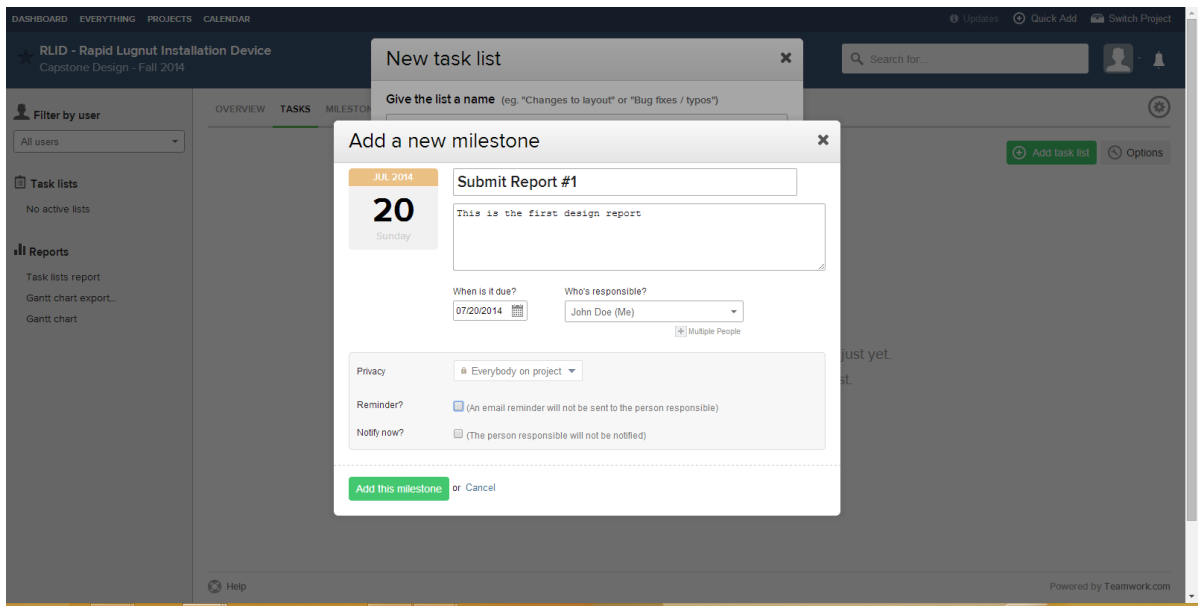
Give the list a name (eg. "Changes to layout" or "Bug fixes / typos")
Report writing and presentation

Notes Privacy Milestone Advanced

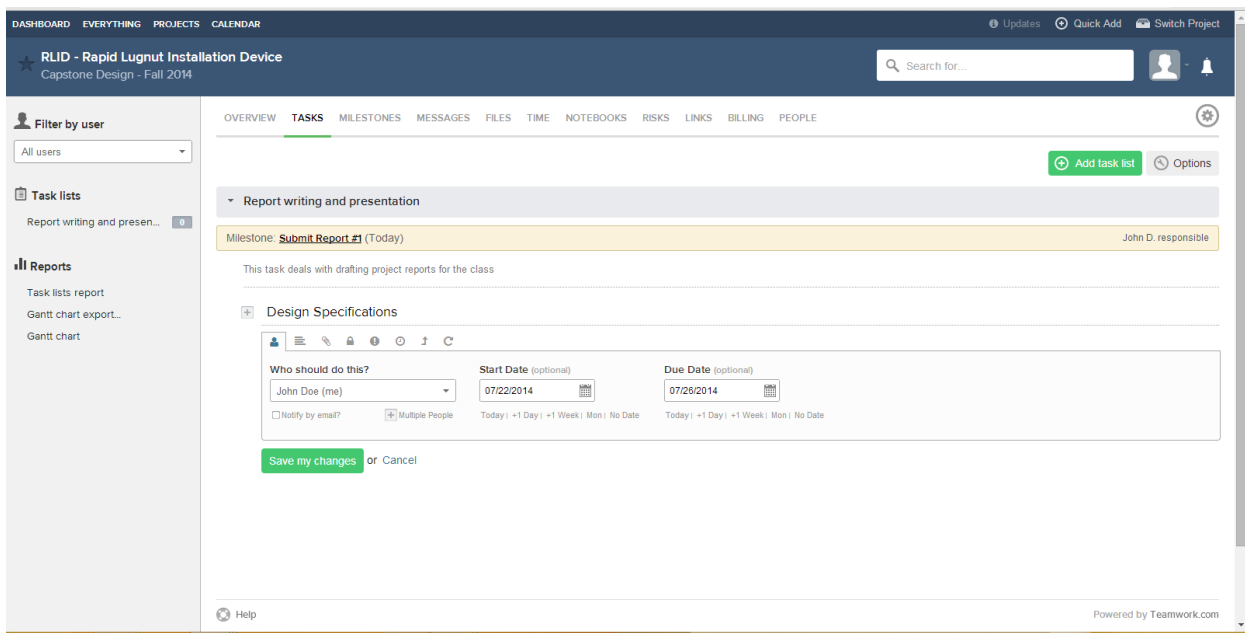
Does this list relate to a milestone?
No, this task list doesn't relate to a milestone

+ Create a new milestone...

Add this task list Cancel



c. Add tasks to the task list



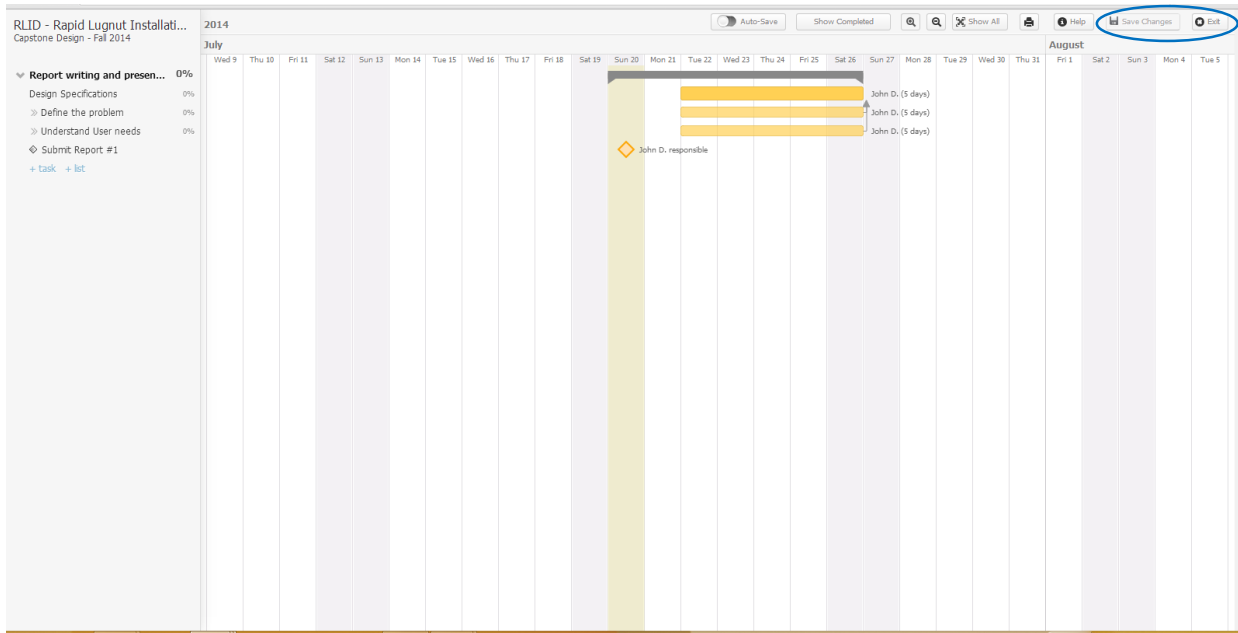
d. You can add sub-tasks for each task

The screenshot shows the Teamwork.com interface for a project named "RLID - Rapid Lugnut Installation Device" (Capstone Design - Fall 2014). The left sidebar contains navigation options: "Filter by user" (set to "All users"), "Task lists" (with a sub-task list for "Report writing and presentation"), and "Reports". The main area displays the "TASKS" tab. A task titled "Design Specifications" is selected, showing its details: "Who should do this?" (John Doe (me)), "Start Date" (07/22/2014), and "Due Date" (07/26/2014). A modal window titled "Add sub-tasks" is open, prompting the user to "What needs to be done?". The modal includes a "Who should do this?" dropdown (set to John Doe (me)), "Start Date" and "Due Date" fields (both set to 07/22/2014 and 07/26/2014 respectively), and checkboxes for "Notify by email?" and "Multiple People". The modal also has "Save my changes" and "Cancel" buttons.

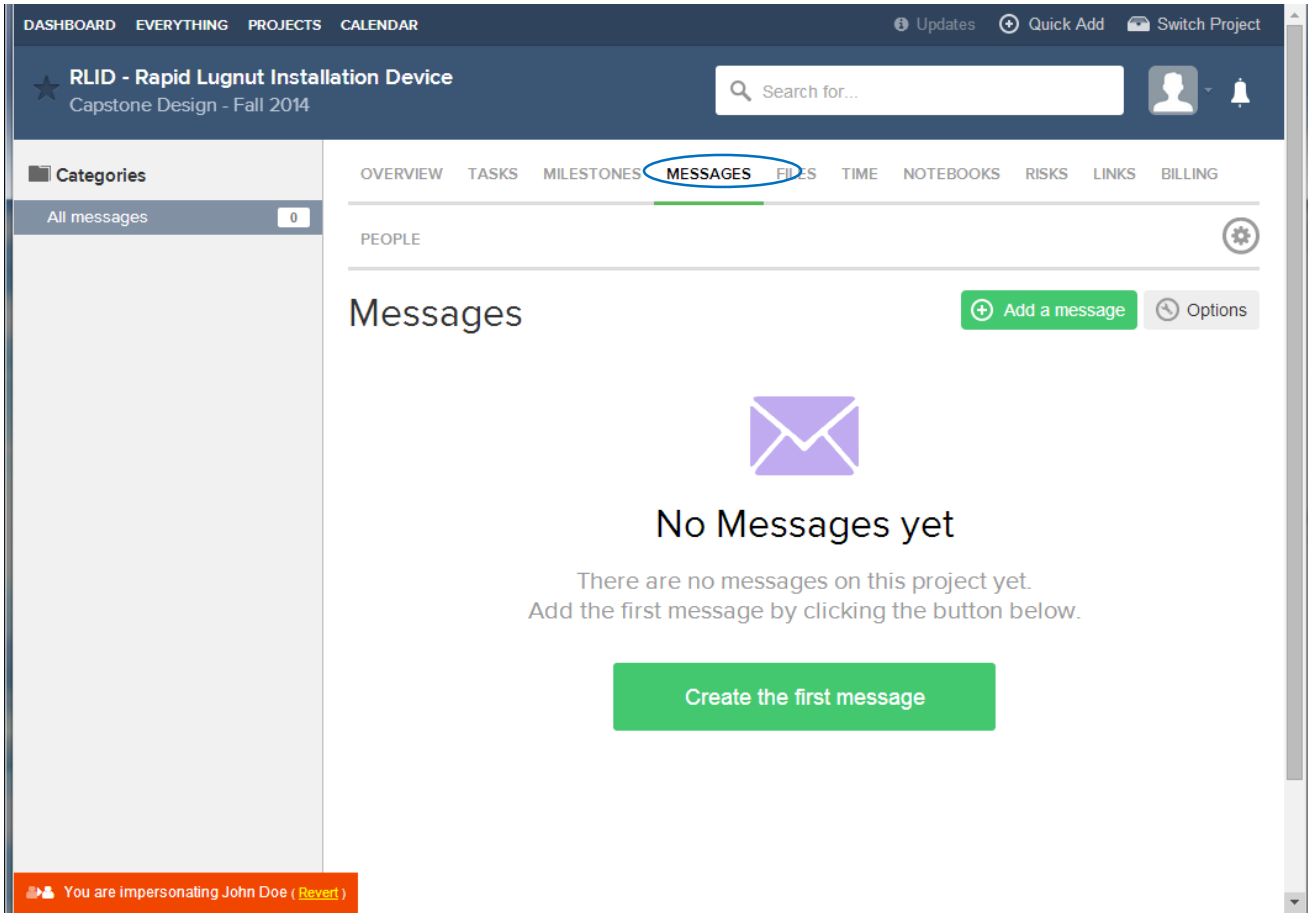
The screenshot shows the same Teamwork.com interface, but with the "Add a task" button visible at the bottom of the task list. The task list now includes two tasks: "Design Specifications" (John D., Start: in 2 days, Tue Jul 22nd, Due: in 6 days, Sat Jul 26th) and "Define the problem" (John D., Start: in 2 days, Tue Jul 22nd, Due: in 6 days, Sat Jul 26th). The "Add a task" button is located at the bottom of the task list, below the "Define the problem" task.

e. View your tasks on automatically created Gantt Chart

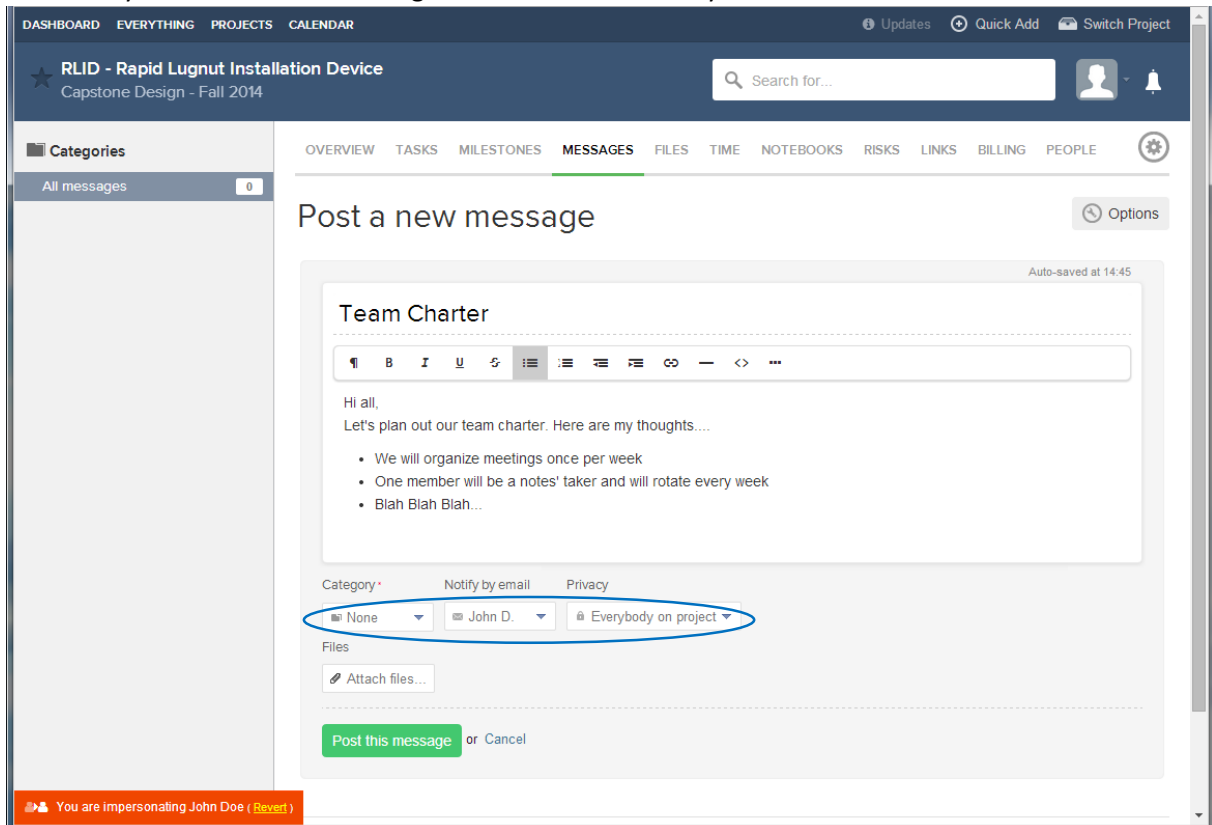
The screenshot shows the Teamwork.com project interface for 'RLID - Rapid Lugnut Installation Device' (Capstone Design - Fall 2014). The top navigation bar includes 'DASHBOARD', 'EVERYTHING', 'PROJECTS', and 'CALENDAR'. The left sidebar has a 'Filter by user' dropdown set to 'All users', and a 'Task lists' section with a link to 'Gantt chart' circled in blue. The main content area is titled 'Report writing and presentation' and shows a milestone 'Submit Report #1 (Today)' with a due date of 'Today' and 'John D. responsible'. Below the milestone, there are three tasks: 'Design Specifications' (Start: in 2 days, Tue Jul 22nd; Due: in 6 days, Sat Jul 26th), 'Define the problem' (Start: in 2 days, Tue Jul 22nd; Due: in 6 days, Sat Jul 26th), and 'Understand User needs' (Start: in 2 days, Tue Jul 22nd; Due: in 6 days, Sat Jul 26th). Each task is assigned to 'John D.' and has a 5-day duration. There are buttons for 'Add task list', 'Options', 'Add a task', and 'Add sub-task'.



7. You can send messages to entire team directly from the site using the “Messages” tab. This can help maintain common repository of email messages



- a. Choose if you want to send messages to entire team or only few members of the team:



b. Team members can respond directly via their email clients

Calendar

Tasks

Briefcase

Preferences

Re: (RLID - Rap

Send

Cancel

Save Draft

Add Attachment

Spell Check

Options

To:

"Georgia Institute of Technology" <tw.1.1938855.280@replies.teamwork.com>

Cc:

Show BCC

Subject:

Re: (RLID - Rapid Lugnut Installation Device) Team Charter

Priority: --

Tip: drag and drop files from your desktop to add attachments to this message.

Sans Serif 2 (10pt) § ¶ ☰ ☲ ☳ ☴ ☵ ☶ ☷ ⌨ 🔍 📑 ▾

Hey, I like the idea, but here are my tweaks....
- Blah blah blah...

From: "John Doe (Georgia Institute of Technology)" <application@teamwork.com>
To: webmaster@capstone.gatech.edu
Sent: Tuesday, July 22, 2014 2:47:10 PM
Subject: (RLID - Rapid Lugnut Installation Device) Team Charter

===== WRITE YOUR REPLY ABOVE THIS LINE =====

Jul 22
14:46

John Doe wrote a new [message](#)

Hi all,
Let's plan out our team charter. Here are my thoughts....

- We will organize meetings once per week
- One member will be a notes' taker and will rotate every week
- Blah Blah Blah...

Message Details

Message: Team Charter
Project: RLID - Rapid Lugnut Installation Device
Company: Capstone Design - Fall 2014

Copied To: John Doe

Not interested?: Stop receiving email notifications from this message
YOU CAN POST A REPLY TO THIS MESSAGE BY REPLYING TO THIS EMAIL.

P.S. Just in case: You can retrieve your password by clicking here

c. Messages from team members become a part of the team conversation

DASHBOARD

EVERYTHING

PROJECTS

CALENDAR

Updates

Quick Add

Switch Project

★

RLID - Rapid Lugnut Installation Device

Capstone Design - Fall 2014

Search for...

1

Categories

All messages1

No category1

OVERVIEW

TASKS

MILESTONES

MESSAGES

FILES

TIME

NOTEBOOKS

RISKS

LINKS

BILLING

PEOPLE

Team Charter

Sort by Date

Options

John Doe

2 minutes ago

> 1 person

Hi all,

Let's plan out our team charter. Here are my thoughts....

We will organize meetings once per week

One member will be a notes' taker and will rotate every week

Blah Blah Blah...

Amit S. Jariwala

a few seconds ago

> 1 person

New

Hey, I like the idea, but here are my tweaks....

- Blah blah blah...

✓

Add a reply

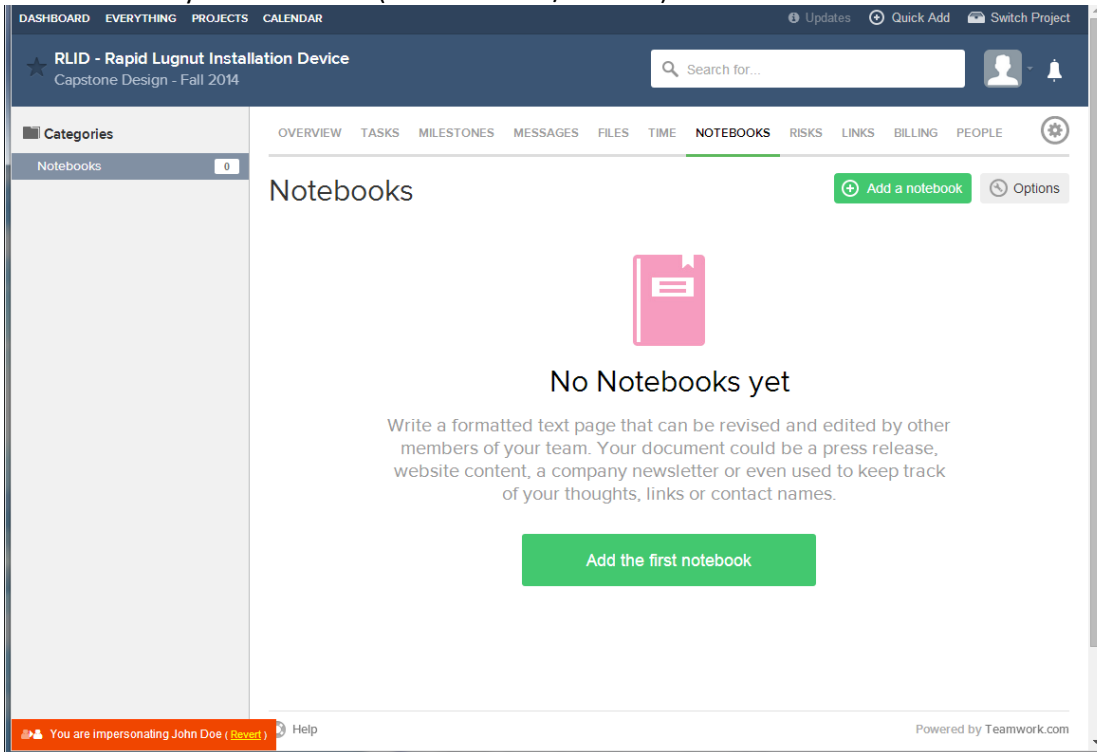
Mark all as read

You are impersonating John Doe (Revert)

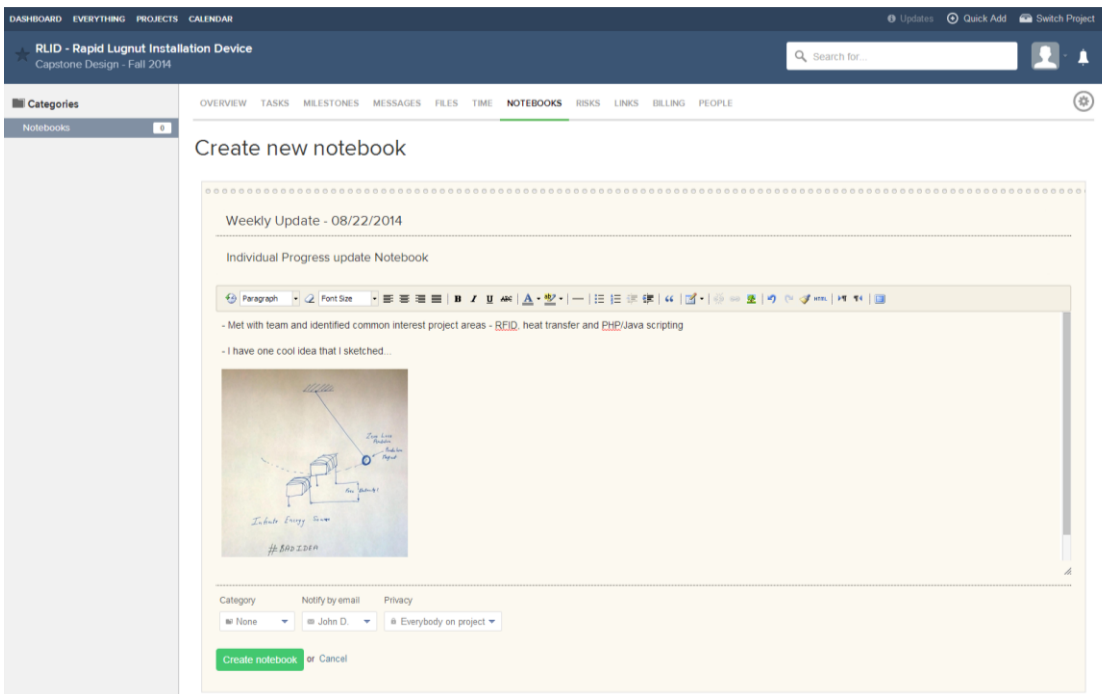
Help

Powered by Teamwork.com

8. Document your notebooks (individual and/or team)



a. Add text or pictures/sketches on the notebook



b. Faculty mentors/instructors can provide comments/suggestions

Categories
All notebooks
No category

OVERVIEW TASKS MILESTONES MESSAGES FILES TIME NOTEBOOKS RISKS LINKS BILLING

PEOPLE

V.1

Weekly Update -
08/22/2014
Individual Progress update Notebook
Version 1 by John Doe on Tuesday 22 July 2014 at 17:42
Latest Version

Edit content Options

- Met with team and identified common interest project areas - RFID, heat transfer and PHP/Java scripting

- I have one cool idea that I sketched...

Auto-saved at 17:43

B B I U S L R T Q A Z < > ...

Your idea terrifies me!

Notify by email Privacy Files

John D. Everybody on project Attach a file...

Save comment or Cancel

9. Track your progress from the “Overview” tab. Faculty can view your progress through this tab as well!

This project is sponsored by ABC and the primary goal of the project is blah blah blah...

People on this project

CAPSTONE DESIGN - FALL 2014

John Doe

Roles & access

[Assign roles to people](#)

[Give more people access](#)

OVERVIEWTASKSMILESTONESMESSAGESFILESTIMENOTEBOOKSRISKSLINKSBILLING

PEOPLE

Overview

Activity

Late milestones 1

Jul 22

Comment

Your idea terrifies me! (Notebook: Weekly Update - 08/22/2014)

Written by Amit S.

17:43

Notebook

Weekly Update - 08/22/2014

Created by John D.

17:42

Reply

Hey, I like the idea, but here are my tweaks.... - Blah blah blah...

Written by Amit S.

14:49

Message

Team Charter

Written by John D.

14:46

Jul 20

Task

Understand User needs (List: Report writing and presentation)

Created by John D.

13:19

Task

Define the problem (List: Report writing and presentation)

Created by John D.

13:19

Task

Design Specifications (List: Report writing and presentation)

Created by John D.

13:18

Task list

Report writing and presentation

Created by John D.

13:17

Milestone

Submit Report #1 (20 July)

Created by John D.

13:17

File

Paste (Sun, Jul 20 2014 1:15 PM).png (V.1 - 133KB)

Uploaded by John D.

13:15

Project

RLID - Rapid Lugnut Installation Device

Created by John D.

13:12

Activity RSS Feed

Export all to Excel

Delete activity

Help

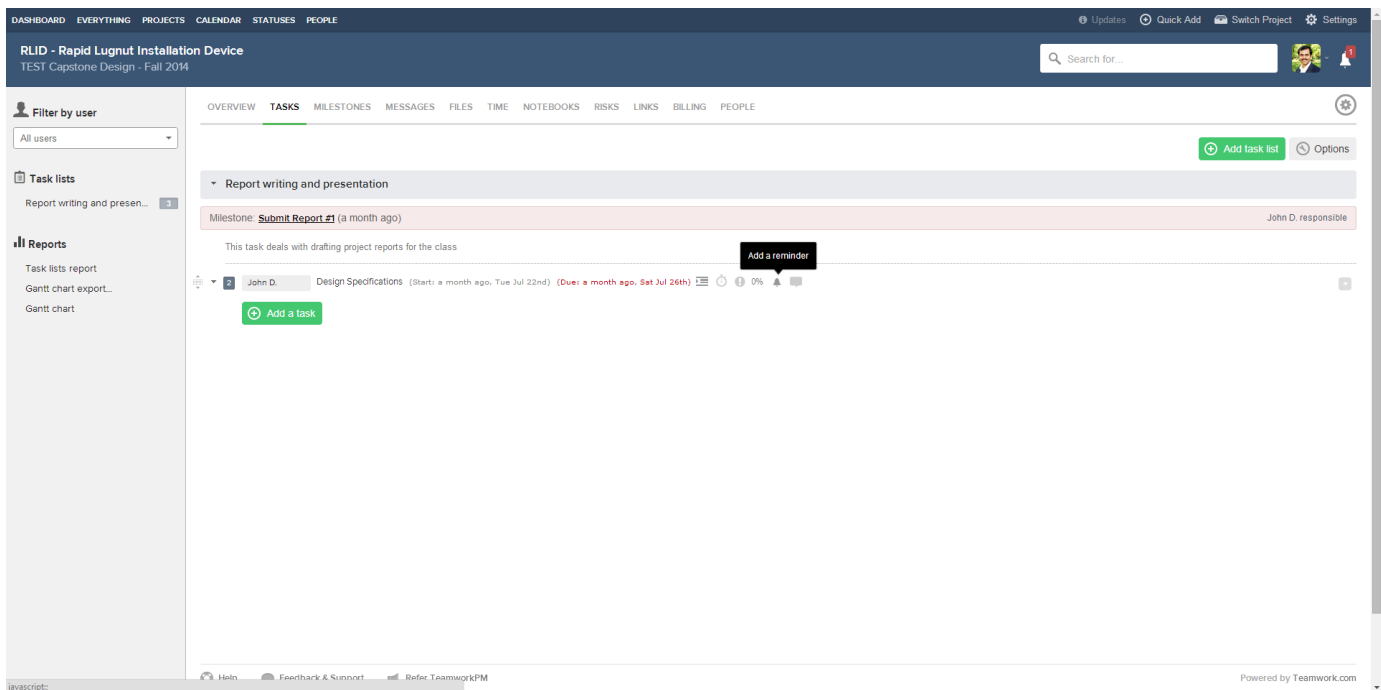
Feedback & Support

Refer TeamworkPM

Powered by Teamwork.com

FAQ:

1. How to change the dates when reminders are sent?
 - Click on “Add Reminder” next to the task name.



- Set the date, time and the mode of reminders (email or SMS)

