General Features & Settings

The Projects page has some simple features & settings that allow you to customize your project management tool.

General Features of a Project

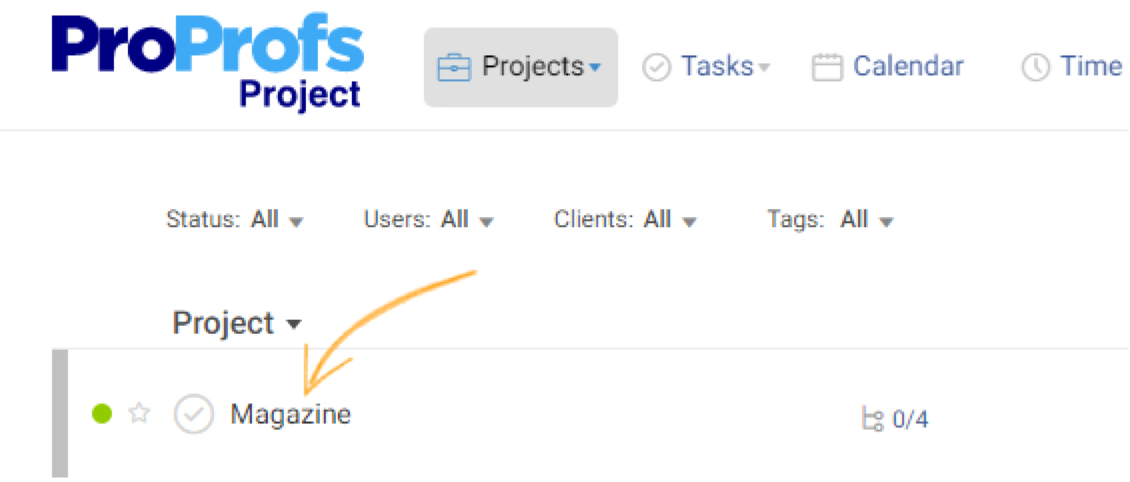
Everything begins with a project. Once you set up a project, you can customize it to your liking. The various features provided on the Project Page are given below:

Inside the project are Tasks and Sub-tasks, however you can also attach files, place comments, write notes, attach time entries and more. Let's go through each aspect of what makes up a project.
Go straight to General Settings.
The following features have been discussed below:

- Tasks
- Status
- Importance
- Due Date
- Progress Bar
- Users
- Tags

Tasks

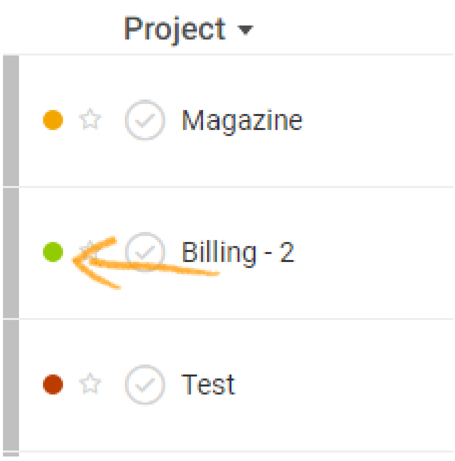
As mentioned above, tasks make up a project. You can access the tasks page by opening a project. Tasks have been covered in a separate article.
To open a Project, click on its name.



Status

Next to the color bar is the **Traffic Light Status** indicator which is incredibly useful for organizing your projects and helping you focus on the right thing. The following statuses can be implemented:

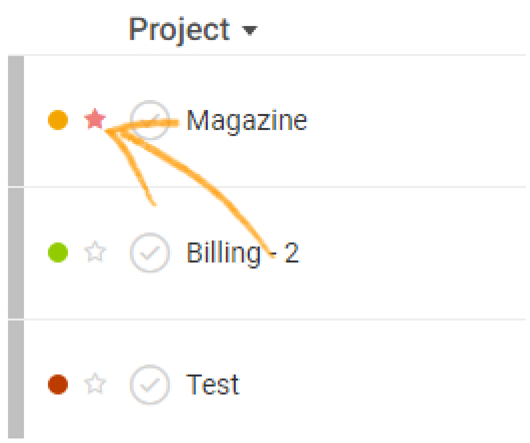
- Green - Active, something you are working on right now.
- Amber - On-hold, you are waiting on something.
- **Red** - In-active, don't think about this right now.



The traffic light status indicators work well when dragging and dropping projects into priority as you can effectively create **dependencies**. For example, at the top of the list, you have an active project (green traffic light), then under that you might have some in-active projects that are dependent on the one above it being completed. Once the project above is complete, you can set the traffic light status to green.
Click on the indicator to change its color.

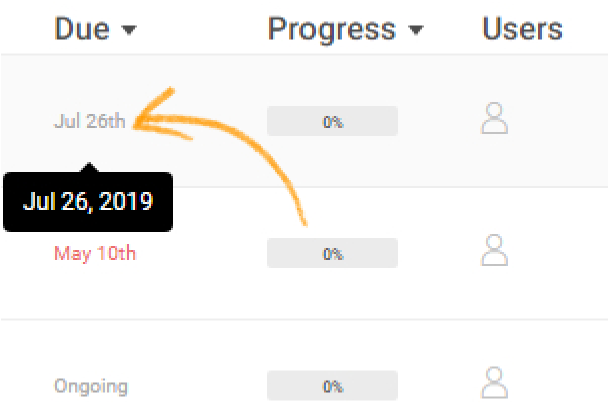
Importance

Next to the status indicator is a star icon which you can click on to mark the project as important. The project will be highlighted and will stand out as important compared to other projects.



Due Date

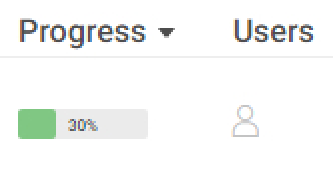
Due dates can be assigned to projects and tasks. You can set a start date and a due date for a project. The time span will show in the projects list, and will also be reflected in the Calendar.



When a project is due the date will highlight in amber and show up in your notifications feed. When the project is overdue the date will highlight in red.

Progress Bar

Progress can be calculated automatically in two ways, either by the number of tasks completed or by the number of hours tracked against the estimated hours.
You can manipulate the second way by the **Time** setting If you want to override the progress and set a manual value, you can do this by clicking on the progress bar.



Tip: You can set your preference for how progress is calculated in the My Company page which is accessible from the Account menu (top right).

User

The user displays the profiles of the users and teams that are working on the pre-mentioned project.

Tags

Projects can be grouped together with multiple tags, to help you filter out projects and organize them better. Your 30 most popular tags will show above the projects list. They can be used to filter projects out.

> **Tip:** You can tag projects by clicking on the project name to open the project activity window, then click *Add Tag*.

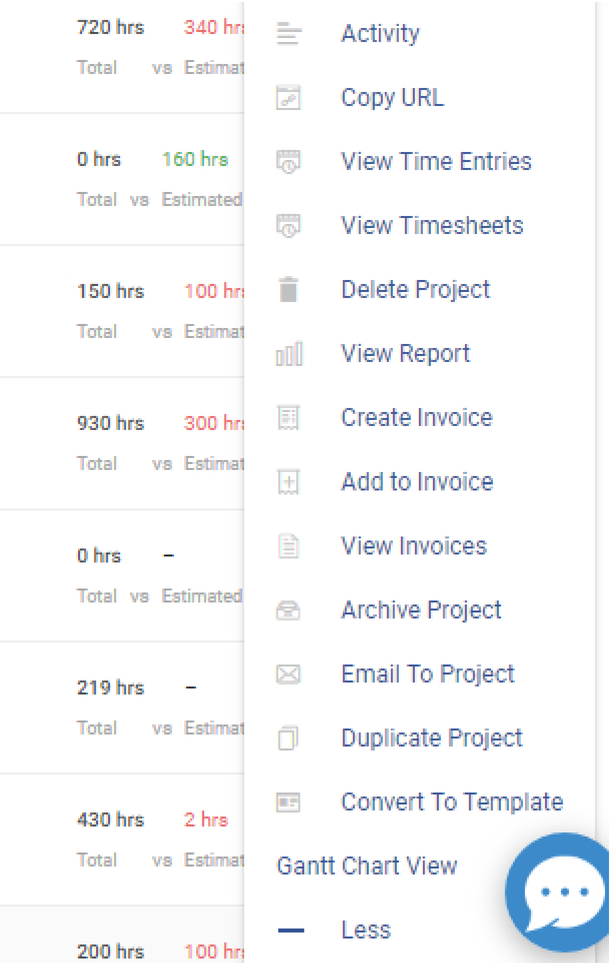
Tags can be added by edit section of the project.

Billable

The billable section records how much time spent on a project is up for billing.

General Settings

The general settings for a project can be found the extreme right of the project. They can be accessed by clicking the 3-dot dropdown.



These are some basic settings that have been covered below:
Activity: Opens the activity section, which shows you the history of the project.
Copy URL: Copies the URL of the project for sharing purposes.
View Time Entries: Opens the time entries window.
View Timesheets: Opens the timesheet window.
Delete Project: Deletes the project.
View Report: Opens a detailed graphical report of the project.
Create Invoice: Redirects you to the create invoice screen.
Add to Invoice: Adds an invoice to the project.
View Invoice: Opens the Invoices page.
Archive Project: Saves the Project to the Archives.
Email to Project: Emails the project details to a client.
Duplicate Project: Creates an exact copy of the project.
Convert to Template: This feature is useful when creating similar styled projects. There is a separate article for the same.
Suggested Reading: Advanced Project Settings