

## Quick Start Guide: SG Project 5 for iPad

### Projects

To create a new project:

1. Tap **Projects** then tap **New Project** and enter a project name
2. Tap **Description** and enter a brief description of the project
3. The default Work Schedule is Monday-Friday. To include weekends, tap **Schedule** then **Set Work Schedule** and select **SG All Days**
4. On the **Objectives** tab, briefly define “success” for the project
5. No need to Save because all changes are auto-saved immediately
6. Tap the blue upward-facing arrow to close the Project Info

When you are done with a project:

1. Tap **Projects** and use the dial along the left to select your project
2. On the **General** tab, tap the **Archived** switch
3. The project will be hidden from your list, but still available if you ever need it

### Tasks

Build your task plan like an outline, with multiple levels to organize

1. Tap one of the **blue + buttons** to add a new task
2. **Swipe right or left** over the task name to indent/outdent
3. Tap the **gear button** for a mini toolbar
4. Use the **arrows along the bottom** to change between 4 views
5. To add people, tap **Task Detail** then tap the **People** tab and **Manage People**. Assign an **Owner** to each task and optionally other People.
6. On the chart view, tap the **Lock Button** to unlock the chart for editing
7. Tap a task to select it then drag the start, end, or middle of the task
8. Tasks are linked together by default, so that they happen in sequence. To unlink tasks, tap **Task Detail** then **Links**. The predecessor task will be highlighted in bright blue. Tap the name of the task to unlink it.
9. The Work Schedule, Work, Start/End Dates, and number of People assigned to a task are all related. **If you are only concerned with tracking the calendar schedule for your project, just ignore the Work field.**

### Reporting

Every week or so, send out a PDF status report to keep everyone on the same page

1. Tap **Projects** and use the dial along the left to select your project
2. Tap **Status** and enter up to 3 short paragraphs describing the current status of the overall project including any major concerns
3. Tap **Task Detail** and use the dial along the left to select each task:
  - a. On the **General** tab, update the **% Done** as you understand it
  - b. On the **Dates** tab, ensure that the Start & End dates are up-to-date
  - c. If you have task-level notes, enter those on the **Notes** tab
4. Tap the blue upward-facing arrow to close the Task Detail
5. Tap **Share** and select the **Email** tab
6. Select **PDF** format and tap **Send Email**
7. You can enter the email recipients when the email pops up, then **Send**