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