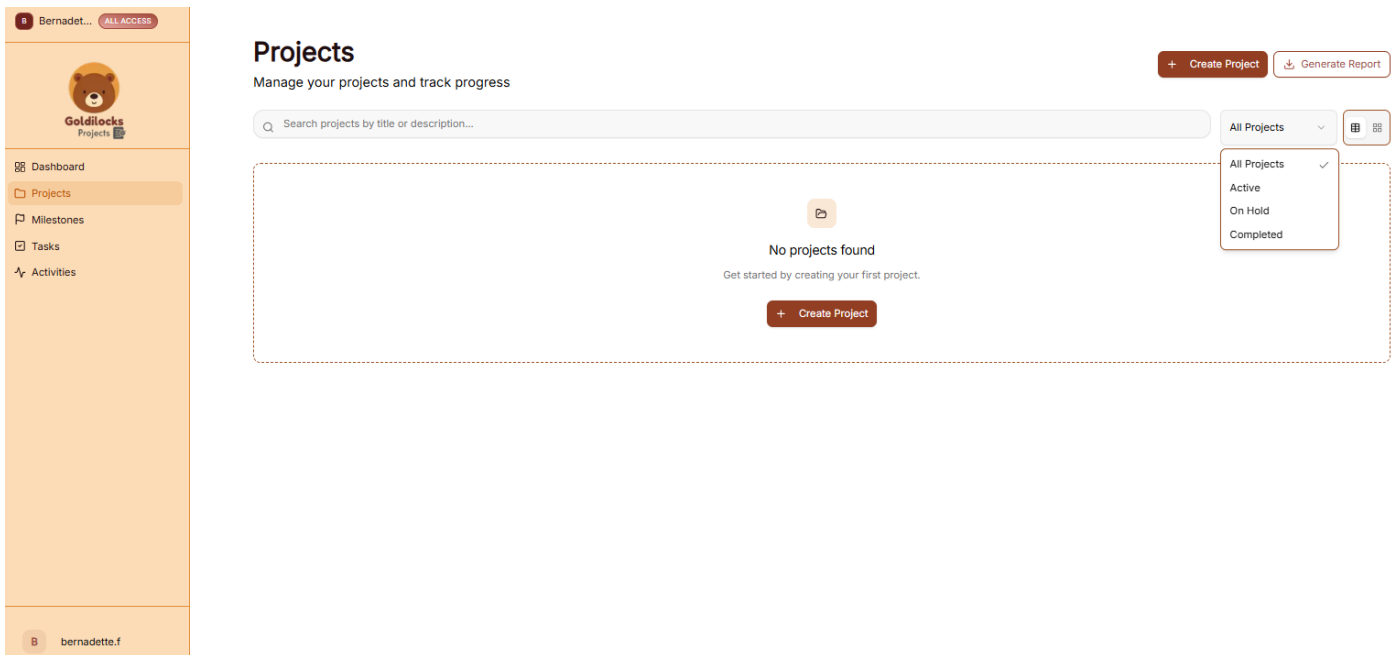


# Managing Your Projects

## Managing Projects



The Projects page is designed to help you manage your high-level initiatives and track their progress through a searchable list or grid view.

## Managing Your Projects

At the top of the Projects page, you have several tools to organize and filter your workspace:

- Search: Use the search bar to find projects by title or description.
- Filter by Status: Use the dropdown menu to filter your view. Options include:
  - All Projects
  - Active
  - On Hold
  - Completed
- View Toggle: Switch between a List View or Grid View using the icons next to the status filter.
- Generate Report: Click this button to export your project data.

## Creating a New Project

**Create New Project** ×

Add a new project to start tracking tasks and milestones.

**Project Title \***

Enter your project name

**Project Description**

Provide a brief description of the project

**Start Date** **Due Date \***

Pick a date Pick a date

**Project Status**

Active

Cancel Create Project

To start a new initiative, click the brown "+ Create Project" button. This opens a configuration window:

- **Project Title \***: Enter a unique name for your project (Required).
- **Project Description**: Provide a brief summary of the project's goals or scope.
- **Start Date**: Select the date when work on the project begins.
- **Due Date \***: Select the final deadline for the project (Required).
- **Project Status**: Use the dropdown to set the current state (e.g., Active).
- **Create Project Button**: Click the brown button to save and launch your project.

## Exporting Data

**Generate Projects Report** ×

Choose a format and export your report

PDF — best for printing and sharing

Excel — best for analysis and editing

Cancel Generate Report

When you click Generate Report, a pop-up window allows you to choose your preferred export format:

- **PDF**: Best for printing and sharing official progress updates.
- **Excel**: Best for deep analysis and manual data editing.

- Generate Report Button: Finalize the export in your chosen format.
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