



Clarizen Go Quick Start Guide



Welcome

Welcome! Get to know the main building blocks in Clarizen Go

Workspaces

Use workspaces to manage projects, products, customers, teams, etc.

Boards

In a Workspace, use one or more Boards to create and track Tasks. Use multiple Boards to divide work into different sprints, teams, project phases, sub-projects, or any other group

Tasks

In the Board, organize tasks in Stages

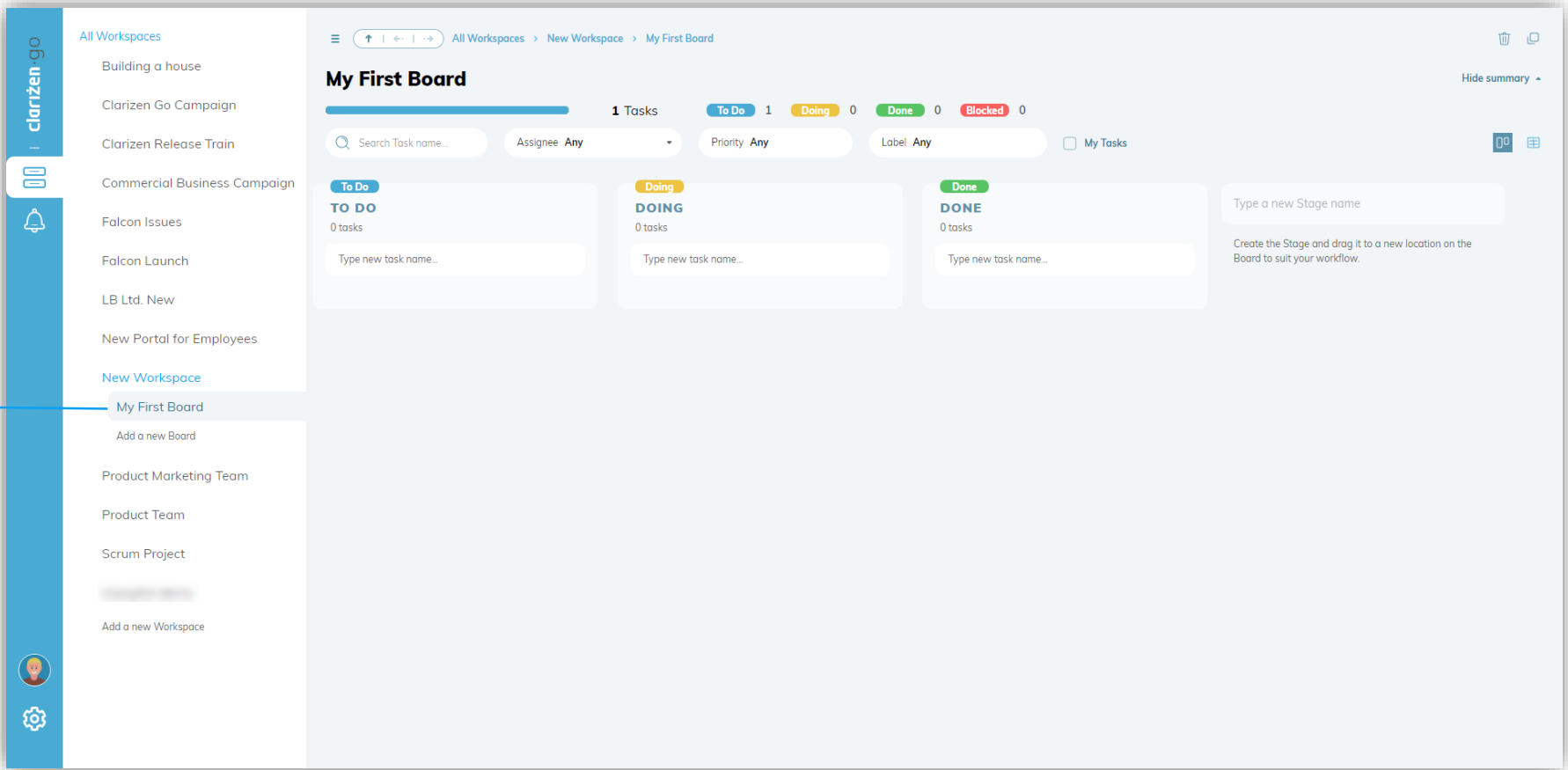
The screenshot displays the Clarizen Go interface. On the left, a sidebar lists workspaces under 'Commercial Business Campaign', including 'Outbound Marketing'. The main area shows a Kanban board for 'Outbound Marketing' with 7 tasks. The board is divided into stages: 'To Do' (3 tasks), 'Doing' (2 tasks), 'Done' (2 tasks), and 'Blocked' (0 tasks). The 'To Do' stage contains tasks like 'Assign & brief new writer' and 'Setup campaign analytics'. The 'Doing' stage contains 'Customer Success Story' and 'Schedule Review Process'. The 'Done' stage contains 'Define email audience segment' and 'Campaign KPIs'. The interface includes search bars, filters for assignee, priority, and label, and a 'My Tasks' toggle.

Meet Clarizen Go. Welcome to Your Workspace

Welcome

To help you get started, an example Workspace and a board have been created in your environment.

Your first Board



Customize Stages to Suit Your Processes

Update Task progress

Drag tasks between Stages to update progress

Set colors

Set the Stage status (color) to reflect the status of the tasks in the Stage (To do, In progress, Done)

Add Stages

Organize Tasks in Stages that represent the phases in the project.
Add Stages if you require additional phases in the project.

The screenshot displays a Kanban board for a project named 'R&B Incorporated'. At the top, there is a navigation bar with 'All Workspaces > LB Ltd. New > R&B Incorporated'. Below this, a progress bar shows '3 Tasks' with a breakdown: 'To Do' (1), 'Doing' (2), 'Done' (0), and 'Blocked' (0). Search and filter options include 'Search Task name...', 'Assignee Any', 'Priority Any', and 'Label Any'. A 'My Tasks' toggle is also present. The board is divided into three columns representing stages: 'TO DO' (1 task), 'DOING' (2 tasks), and 'DONE' (0 tasks). Each stage has a header with its name and a count, and a text input field for adding new tasks. The 'DOING' column contains two task cards: 'Reorder sample booklet' (Low priority, assigned to Larry Bear) and 'Revise article' (Medium priority, assigned to Larry Bear). A 'Create project outline' card is visible in the 'TO DO' column. On the right side, there are icons for trash, copy, and a 'Hide summary' dropdown. A floating dialog box on the right prompts the user to 'Type a new Stage name' and provides instructions: 'Create the Stage and drag it to a new location on the Board to suit your workflow.'

Create Tasks

Tasks can be basic, or include all the details

Include checklists and check off done items

Add labels for filtering and searching

Set independent due dates or relative to a Milestone.

Categorize tasks into logical groups, such as epics, categories or work types.

Add attachments

All Workspaces > LB Ltd. New > R&B Incorporated

Revise article

Medium **DOING** Doing Assignee: Larry Bear

Description

Body text | B | I | U | | 99 |

The article is ready for revision

Checklist

- Create draft
- Review draft
- Make revisions

Type to add a new item

Labels Add a label

Documentation Draft

Scheduling

Estimated Effort Remaining Effort

5 Days 3 Hours

Start Date Due Date

Jun 28, 2019 Use Milestone date Select due date

Epic

Corporate

Board **Stage**

R&B Incorporated Doing

Attachments

Choose a file or Drag it here

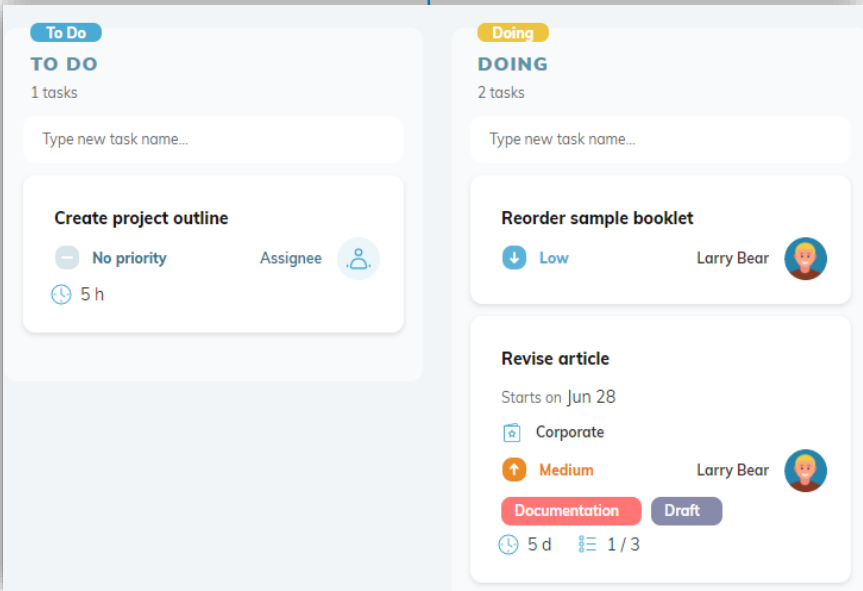
Different ways to view the work

Switch views and focus on what you need to do.

In all views you can filter by priority, assignees, labels or your own tasks.

Kanban
Customize the board Stages to reflect different phases in your process. Drag Tasks to update progress

Grid
View and update tasks inline



Name ↑	Priority	Status	Stage
Type to create a new Task			
Create project outline	No priority	To Do	To Do
Reorder sample booklet	Low	Doing	Doing
Revise article	Medium	Doing	Doing

Track important dates with Milestones

Track progress with Milestones

Manage by: [Tasks](#) [Members](#) [Epics](#) **[Milestones](#)** [Boards](#)

Sort by: **Name** [↑ A-Z](#) Milestones **All Milestones** [All](#) My Milestones

Type a new Milestone name

Milestone Name	Tasks	To Do	Doing	Blocked	Done	Due Date
Cyber Ins Launch	9	2	3	0	4	June 19
Email1: Cyber Risks	3	0	2	0	1	April 15
Email2-Cyber Protect	5	3	2	0	0	May 1

Track important dates with Milestones (cont.)

Set due dates for Tasks relative to a Milestone

The tasks' due dates will automatically shift if the Milestone moves

The screenshot shows a configuration panel for a task. It is divided into two main sections: 'Start Date' and 'Due Date'.
- Under 'Start Date', there is a button labeled 'Select start date'.
- Under 'Due Date', there is a toggle switch labeled 'Use Milestone date' which is currently turned on. To its right, the text 'Due on Mar 07, 2019' is displayed with a small calendar icon.
- Below these, there is a 'Milestone' dropdown menu currently set to 'no date'.
- To the right of the milestone dropdown is a 'Before Milestone Due Date' section, which includes a numeric input field set to '0' and a unit dropdown menu set to 'Weeks'.

Categorize with Epics

Categorize tasks into logical groups, such as epics, deliverables, work types, customers, or anything else by which you want to group and track tasks.

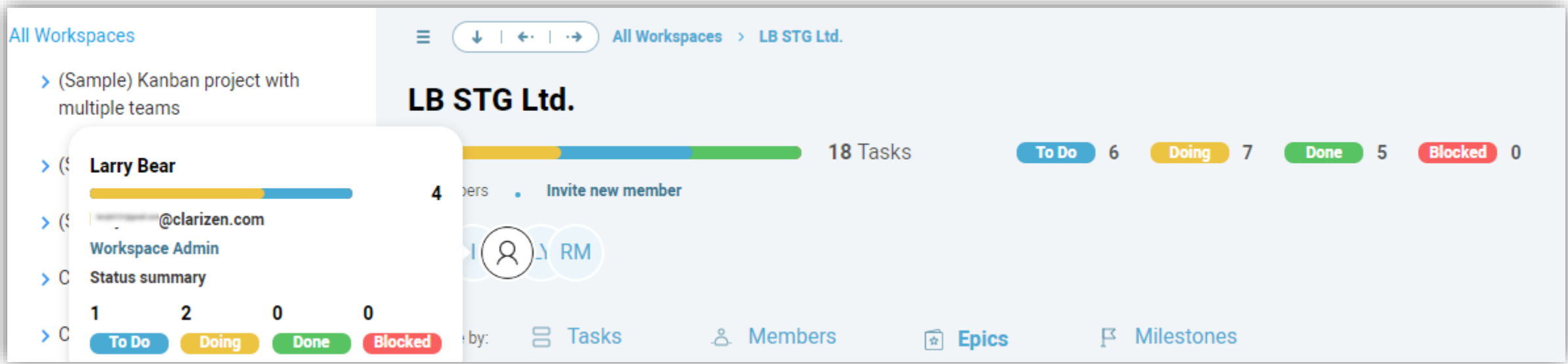
View and track tasks in the Workspace, under the Epics tab.

The screenshot shows the 'Epics' tab in a workspace. At the top, there are navigation options: 'Manage by: Tasks', 'Members', 'Epics' (selected), 'Milestones', and 'Boards'. Below this, there are filters: 'Sort by: Name', '+A-Z', 'Epics All Epics', 'All', and 'My Epics'. A search bar is present with the placeholder text 'Type a new Epic name'. The main content area displays four epic cards, each with a title, a progress bar, a total task count, and a status summary.

Epic Name	Total Tasks	To Do	Doing	Blocked	Done
Audience Targeting	4	2	1	0	1
Design & Layout	7	0	3	1	3
Email Campaign	5	3	1	0	1
Marketing Materials	8	1	5	0	2

See an updated status in the Summary

In Workspaces and Boards you can view the current status of the tasks.
In a Workspace, hover over a user to see the user's status.



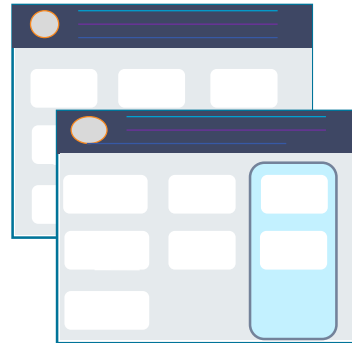
How will you use Clarizen Go?

Here are some examples

Manage a project with multiple teams

Create a Board for each team

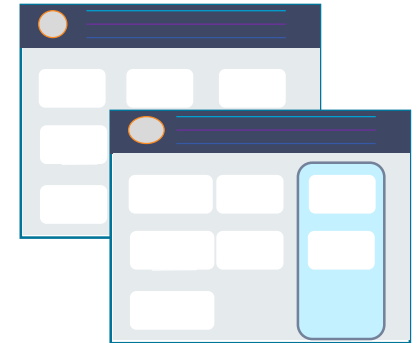
Create Stages to reflect the work process of the specific team



Manage a Scrum Project

Create a Board for each sprint

Add a Stage for each phase in the sprint.
Add tasks to Stages.

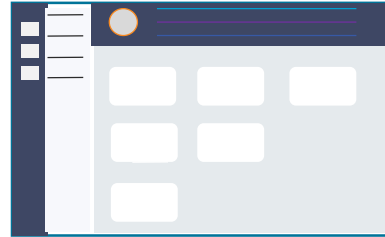


How will you use Clarizen Go? (cont.)

Some more examples

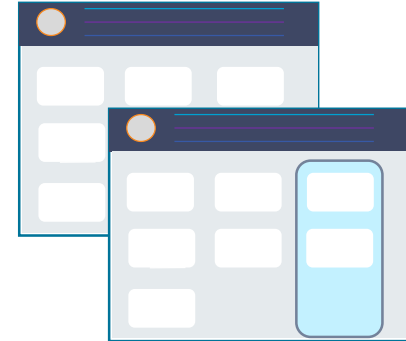
Manage a project with multiple customers

Create a Workspace for each customer

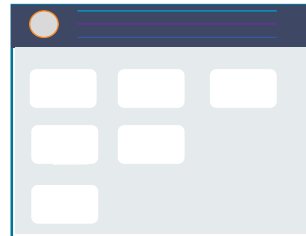


or

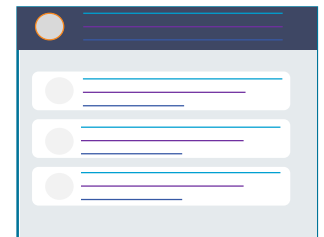
Create a Board for each customer



Create a Board for each work type or deliverable, such as Demo, RFP, etc.



For each Task, associate an Epic. Epics represent Work types or deliverables such as Demo, RFP, etc.





THANKS

www.clarizen.com

