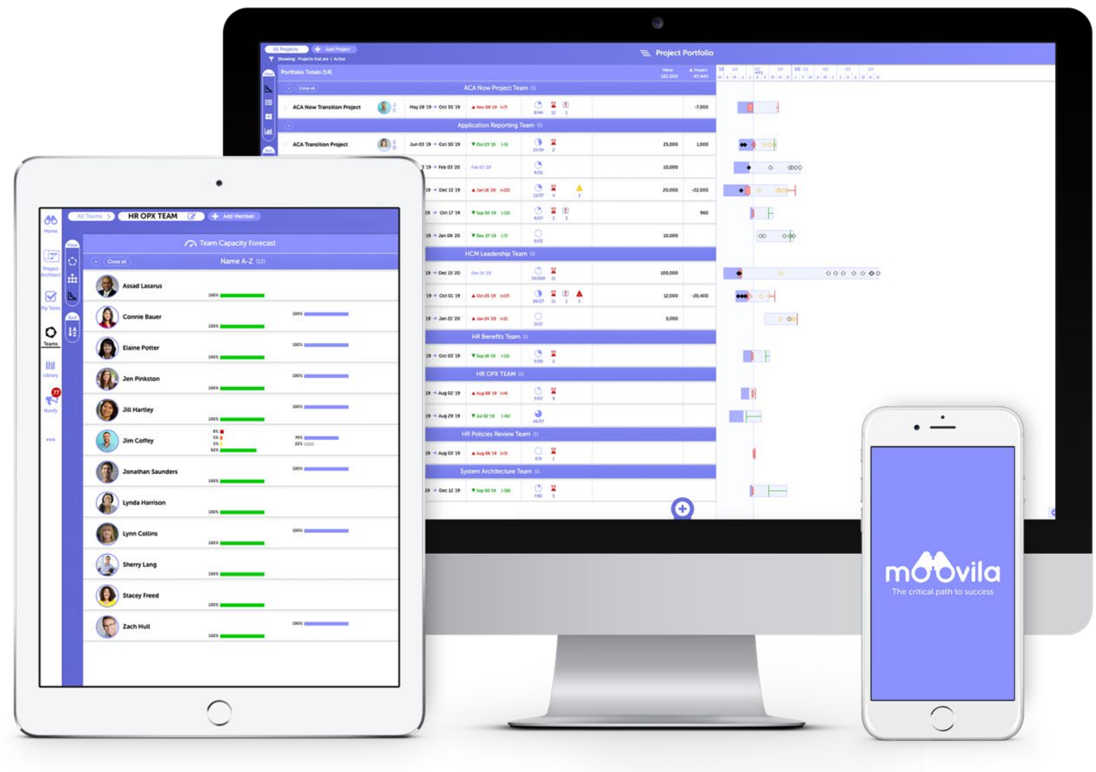
Moovila Quick Start Guide

moovila

Welcome to Moovila!

The Moovila Quick Start Guide is intended to give you an introductory, first-hand experience of using the solution. Feel the power and see its ease of use, so you can quickly start using it with your teams to improve work and process management.

As you're guided through features and functionality throughout this experience, look for ***ACTION*** sections for specific steps and instructions.



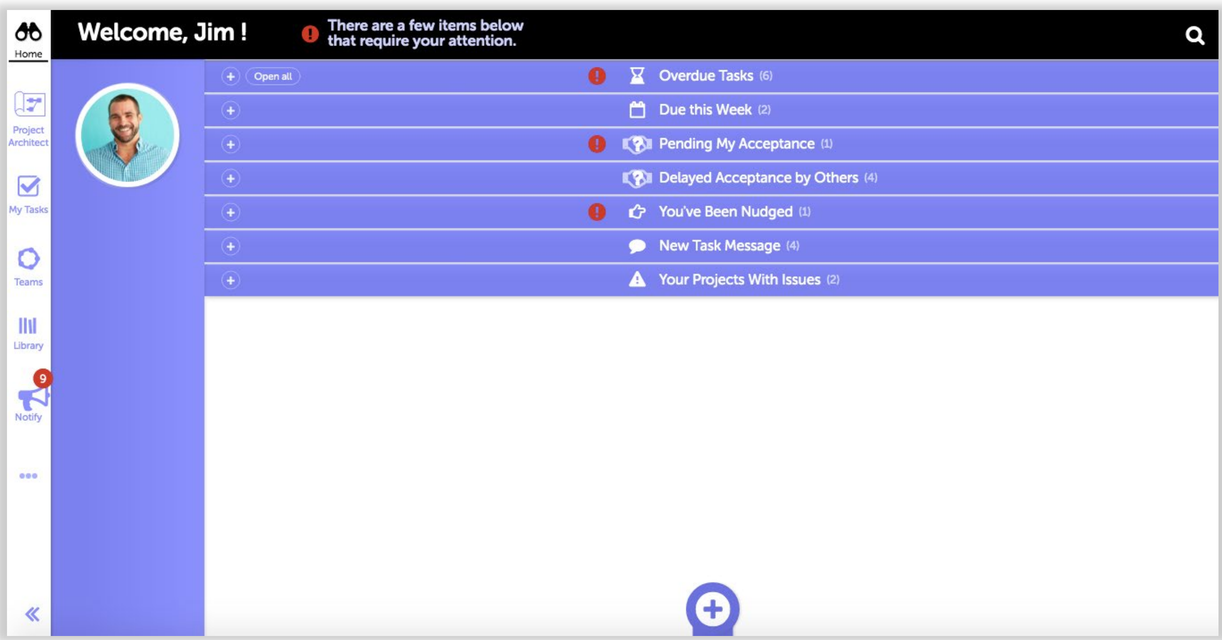
If you have any questions, please reach out to support@moovila.com.

Quick Start

Let's get started

Your first destination in Moovila is the Home Screen, which will give you a sense of where you stand with your current work and teams.

The more you use the system, the more dynamic and helpful the Home content will become. Since you're just getting started, there won't be much to report just yet. Eventually, this will become your go-to temperature check of SmartTask status, project delays, outstanding work assignments, capacity concerns, team messages and more.



ACTION: Navigating the Home content

1. Click any tab to reveal a list of SmartTasks.
2. Click any SmartTask in this list. This opens the SmartTask detail.
3. Click anywhere outside of the SmartTask to return Home.

Note: tabs that contain a icon, indicate that an item requires your attention (ex. a SmartTask is overdue, SmartTasks are pending your acceptance, someone has rejected a SmartTask assignment, etc.).

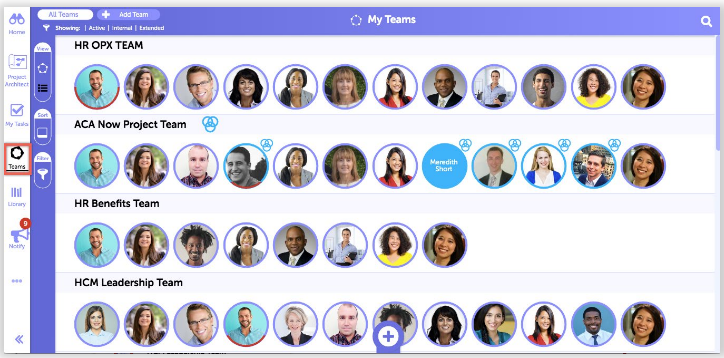
Meet your Teams

The Teams section is where you go to build and manage work groups of people from both in and outside of your organization. You can set permissions to create team Leaders and members to track work and communicate on collaborative work initiatives.

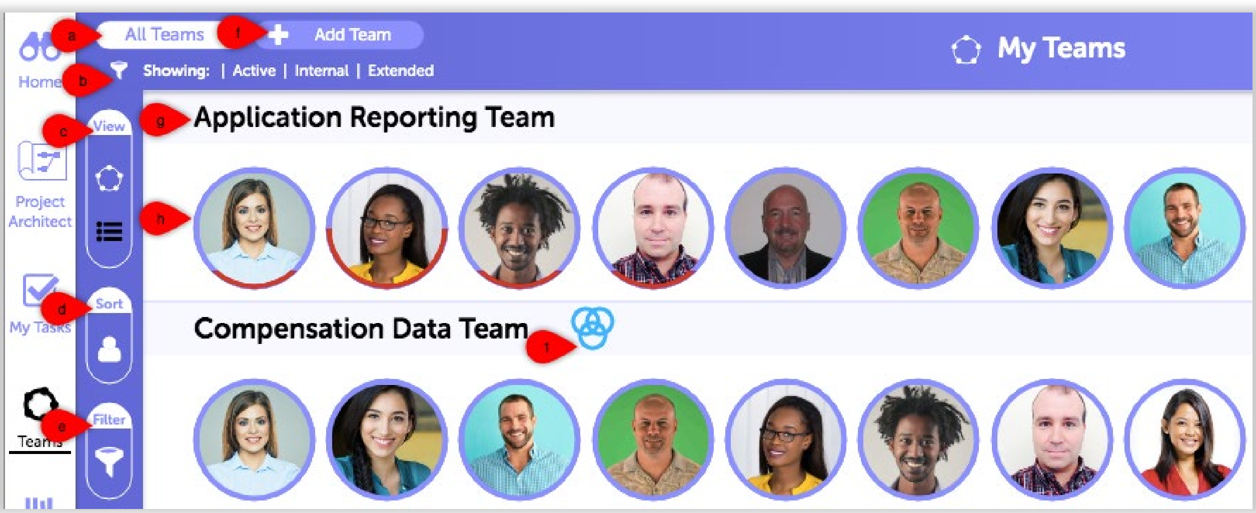
ACTION: Navigating Teams

1. Click the **Teams** icon in the left navigational menu bar (fourth icon from the top).

   Your existing teams appear in List view.



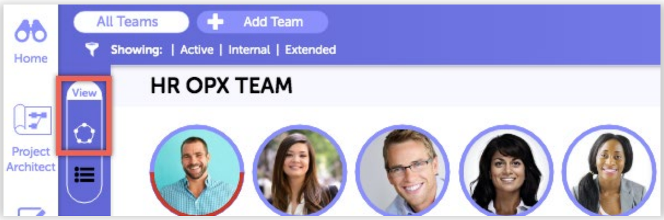
Let's dig deeper into List view.



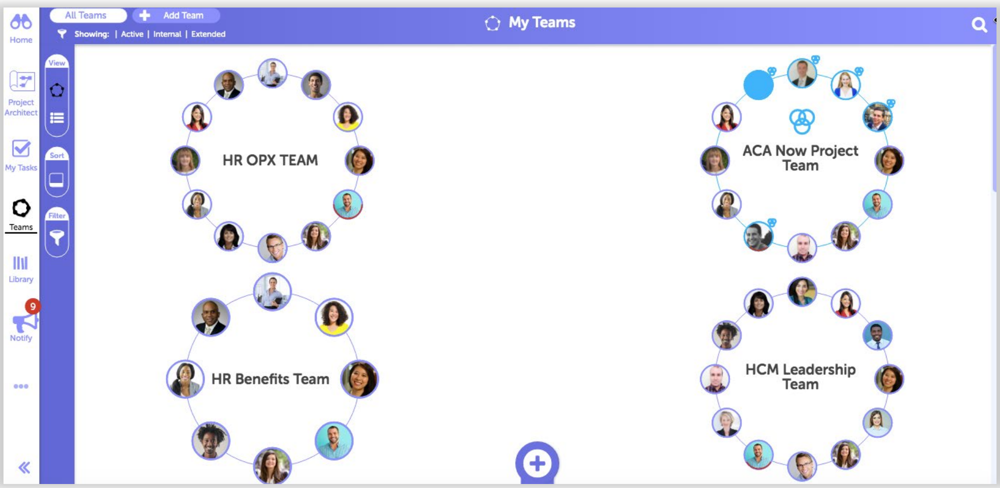
a. **All Teams Button:** This button allows you to return to your main Teams page as you begin to navigate further into your teams.
b. **Filter Status:** This details what kinds of teams you are displaying—in this example we are seeing teams that are active, internal and/or extended. By clicking on the **Filter** icon, you can change filter criteria.
c. **View Panel**: Here you can toggle between different ways of displaying your teams—List view or Circle view. The icon representing the current view is black.
d. **Sort Panel:** Click the **Sort** icon to rearrange teams by Activity, Name, Size, Extended, or Leader.
e. **Filter Panel:** Click the **Filter** icon to filter teams by whether they are Active, Archived, Internal, and/or Extended.
f. **Add Team:** Click the **Add Team** button to create a new team.

g. **Team Name:** This is the name of the team displayed. Click here to drill into team details.
h. **Team Members:** The first team member displayed is the Leader. Click on any team member to drill into team details.
i. **Extended Team Icon:** This icon denotes that the team has been opened to extended members, so this team may include members from outside of your organization.

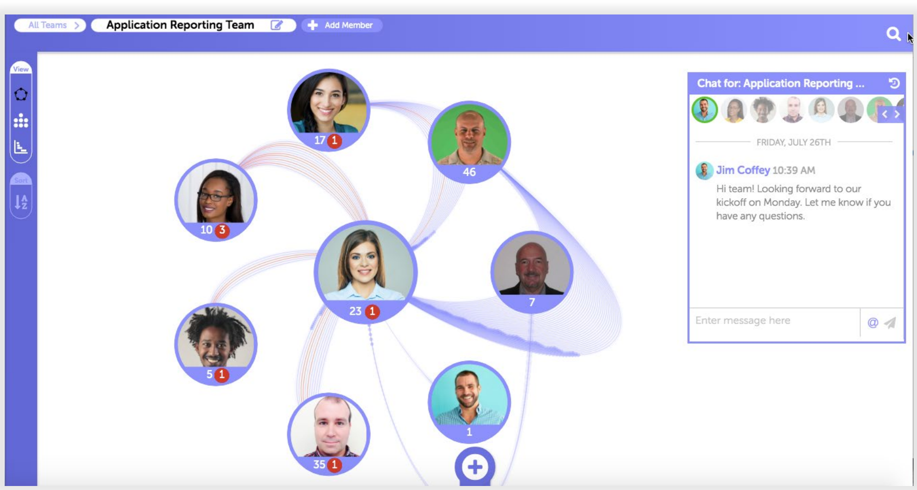
2. To view your Teams in an alternate format, find the View panel in the top left of the Teams navigation bar and select the **Circle** icon.



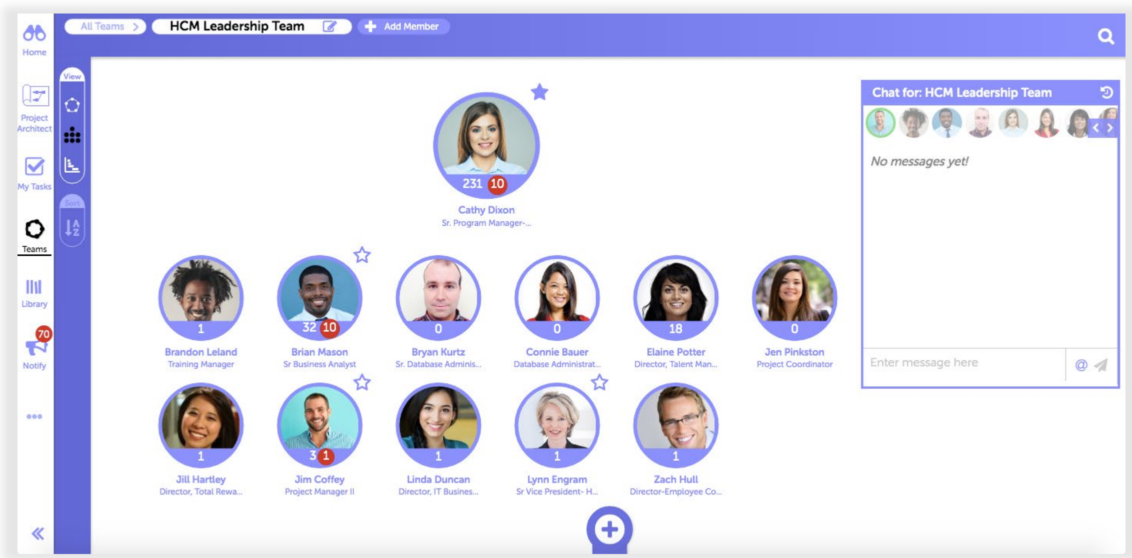
This is the Circle view of Teams:



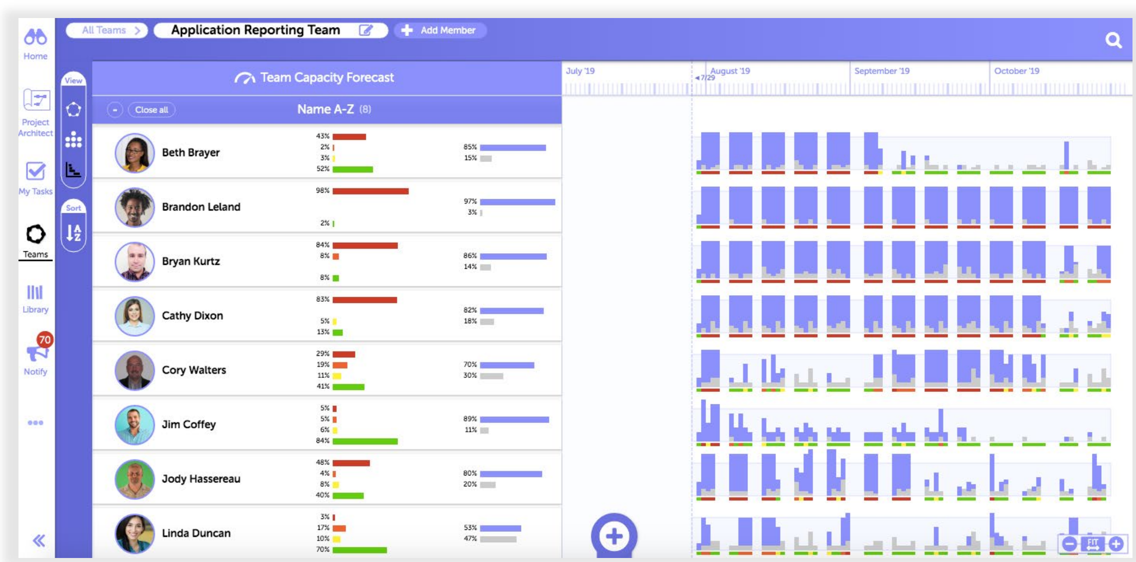
3. Click on one of the teams to view their detail:
   a. **Detail Circle View:** The team's primary leader lies at the center of the circle. Use this view to see assigned SmartTasks as a connection between team members with the color denoting whether a SmartTask is on time (purple) or behind (red). The numbers in each team member's avatar correspond to their assigned SmartTasks, with overdue displaying in red.



b. **Bubble View:** In this view the team's primary leader is displayed at the top and denoted by a purple star. Team members with white stars are leaders and those without stars are simply team members. The numbers found in each team member's avatar correspond to the number of SmartTasks that they've been assigned, with late counts displaying in red.



c. **Capacity Planning View:** This view lists team members alphabetically and displays their availability for the coming 90 days. It also provides visualization around days that are over/under-booked with work and the breakdown of work in Moovila vs. meetings for each team member.

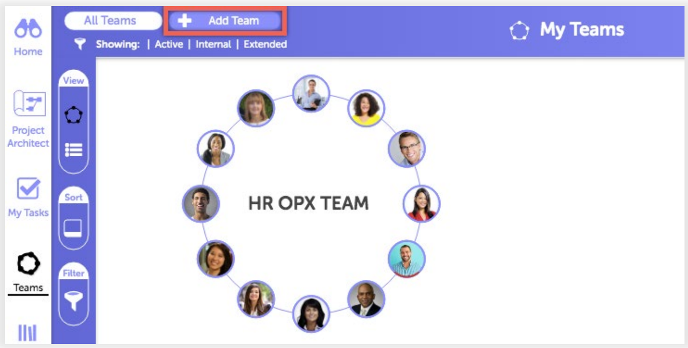


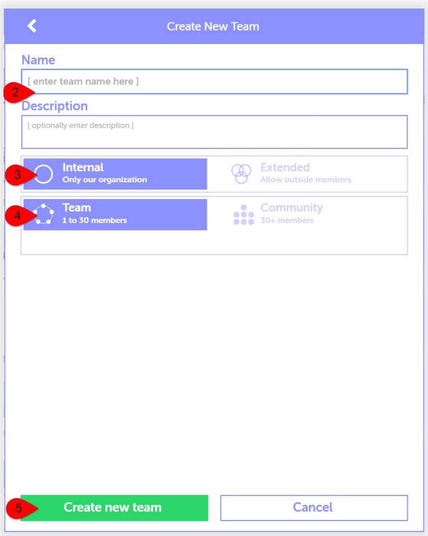
ACTION: Interacting with Teams

1. Enter a message to the team in the chat panel. Everyone on that team will see your message.
2. Click on the avatar of one of your teammates in the Team Flow diagram. This takes you to their SmartTask list.
3. Click the Teams icon in the left navigational menu bar to return to a list of your Teams.

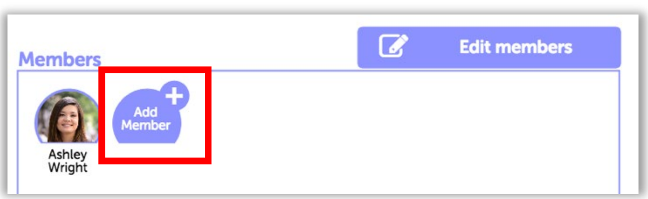
ACTION: Building a new Team

1. Click the **+ Add Team** button in the top left section of the Teams header, next to All Teams.

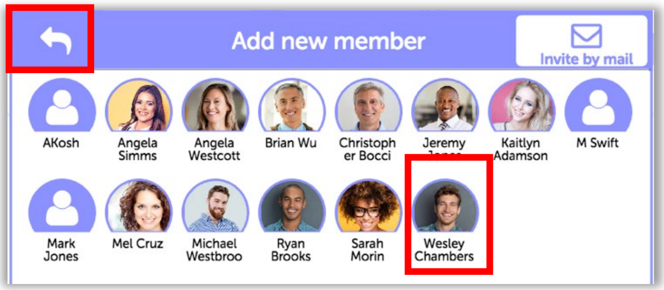




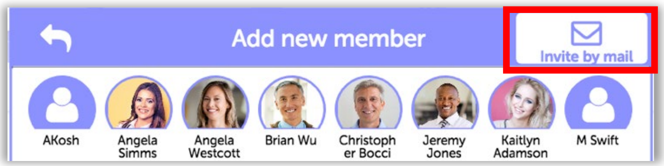
2. Enter a team name and description.
3. Select **Internal** vs **Extended**. (Extended Teams contain members outside of your enterprise.)
4. Select **Team** (1 to 30 members) VS **Community** (30+ members).
5. Click **Create New Team** at the bottom of the form. You can now add members.
6. Click **Add Member** in the Members section.



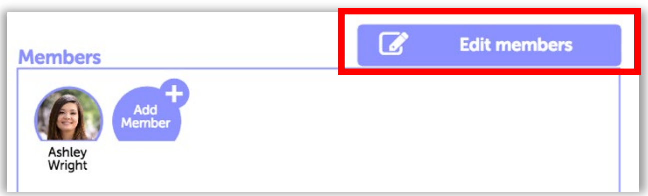
7. Select an existing Moovila user(s) by clicking their avatar. Then hit the **back** arrow in the top left.



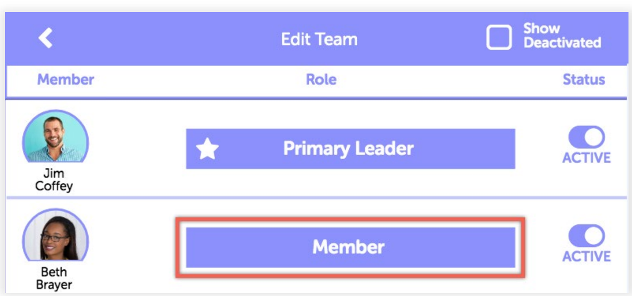
8. Click **Add Member** in the Members section once more.
9. Click **Invite by mail** in the top right. This prompts a form to invite a new user via email.

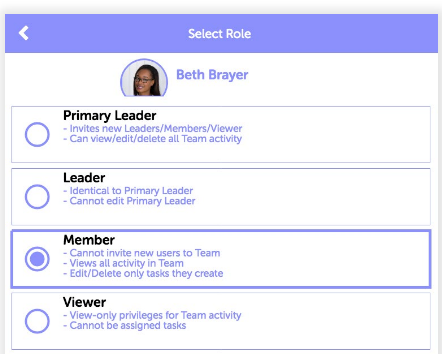


10. Complete the form and hit **Send Invitation**.
11. Return to the Edit Team detail, then click **Edit Members**.



12. Click the **Member** button on one of your newly added teammates to select their role.





13. Click the **back** arrow to return to the Team detail, then hit **Save** at the bottom of the form.

Manage work with SmartTasks

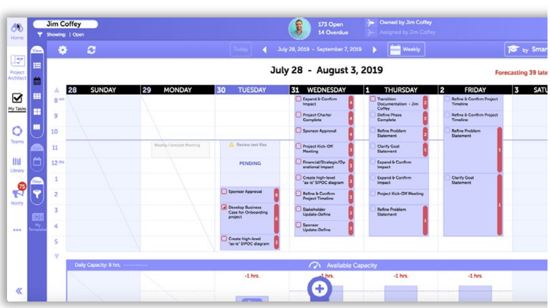
SmartTasks are Moovila's building blocks of success. Assign and track work in an intuitive experience that allows you to shape your data and view your work on your terms with a varied set of display options. And, every SmartTask requires an acceptance, which means team accountability will increase because it's clear who has agreed to do what.

ACTION: Shaping your SmartTask data

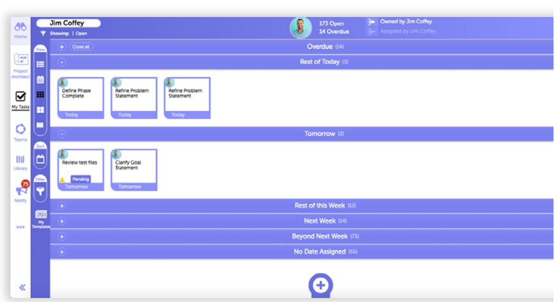
Use the steps shown in the image below and detailed with the corresponding numbers to explore the My Tasks area:

1. Click the **My Tasks** icon.
2. Click through the **View** panel to review your SmartTask display options (initially SmartTasks display in the List View):

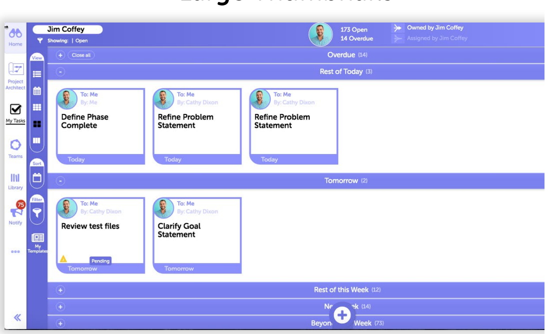
Calendar



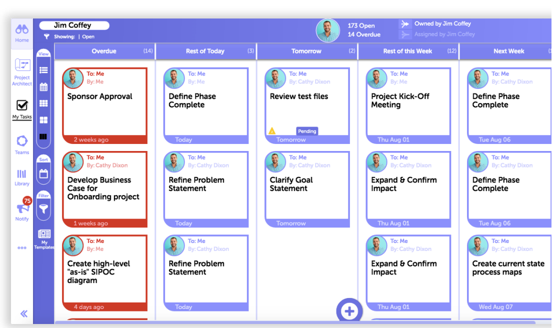
Small Thumbnails



Large Thumbnails



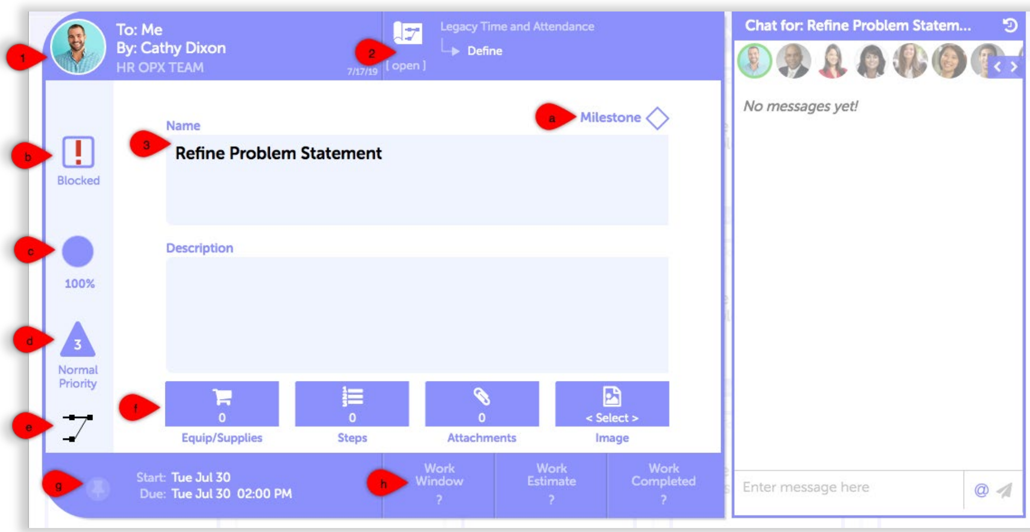
Kanban



3. Click the **Sort** button to arrange SmartTasks in groups by Due Date, Status, Priority, Owner, Assigner, Team or Project.
4. Click the **Filter** button, just below your name in the top left or in the left navigational bar to review your filtering options:
5. Click the arrows next to your name to cycle between SmartTasks Owned and Assigned by you.
6. Click **Open All** on the first group header to reveal all SmartTasks under all headers.
7. Click on any SmartTask to open and view detail.

ACTION: Exploring SmartTask details

Use the steps shown in the image below and detailed with the corresponding numbers to dig deeper into a SmartTask:

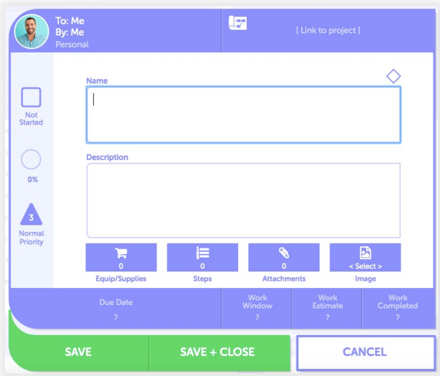


1. Review the SmartTask Owner information. Displayed are the SmartTask owner, assigner, team name and the date assigned
2. Review the Project Information. Displayed are the project associated with this task, project phase and SmartTask status.
3. Review the rest of the SmartTask details (including Name and Description):
   a. Milestone Status
   b. SmartTask Status
   c. Progress (% Complete)
   d. Priority Level
   e. Critical Path
   f. Equipment/Supplies, Steps, Attachments, Image
   g. Start & Due Dates
   h. Work Window (duration), Work Estimate, Work Completed (time entry)
4. Then close the form by clicking anywhere outside of the SmartTask detail.

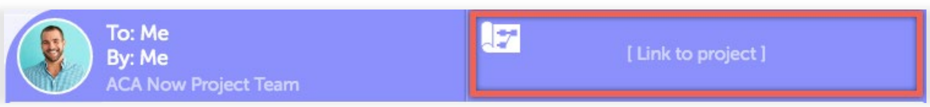
ACTION: Assigning SmartTasks

Note: SmartTasks are assigned to you under Personal by default. This means only you can see the SmartTask, unless you assign it to someone else or yourself in one of your Teams.

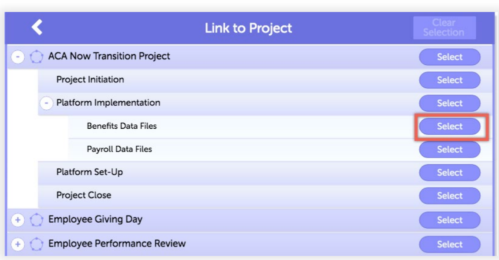
1. Click the  button on the bottom of the screen to prompt the SmartTask creation form.



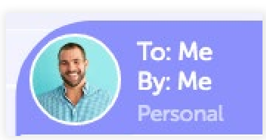
2. Enter a SmartTask name, and optionally a description.
3. Click the **Link to Project** button in the upper right corner of the form to associate your SmartTask with an existing project.



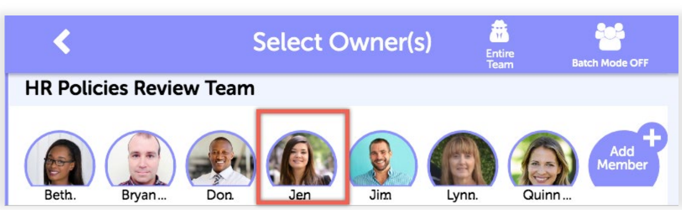
4. Choose the project or project + phase to connect the SmartTask.



5. Click the round avatar in the top left corner of the form to prompt the Select Owner(s) screen.

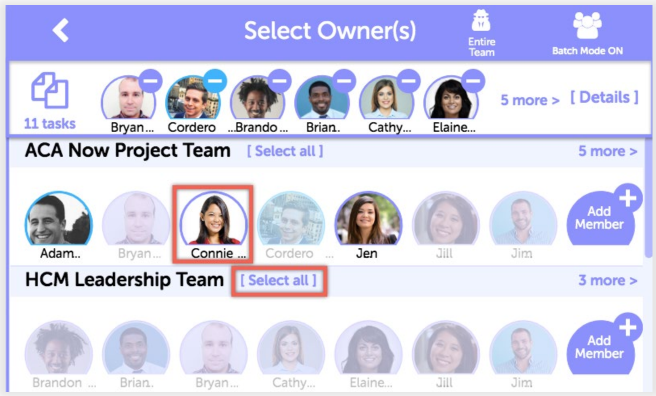


6. Select the SmartTask owner(s).
   a. To assign to one person, select a person from any team, by clicking on their avatar.



   b. To assign the SmartTask to multiple people, create a Batch by hitting the **Batch Mode OFF** button in the top right of the form header, which will turn Batch Mode on.

Select people individually, and/or assign a full team by clicking **Select all**. Note: Batch Mode is on, Moovila will create a separate SmartTask for each individual assigned.

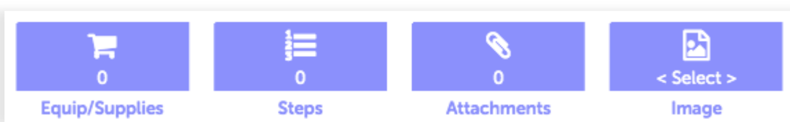


7. Click **Viewing Privacy** to choose who can see your SmartTask. Then hit the **back** arrow in the top left.

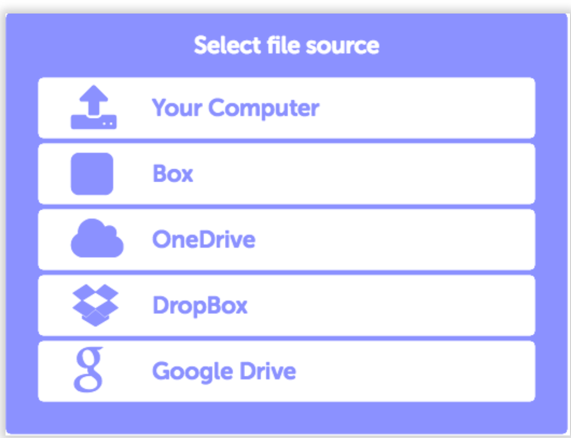
8. Next, optionally assign Due/Start Dates and Work Window (duration) by clicking on each section.

The Work Estimate and Work Completed will usually be addressed by the SmartTask Owner.

9. You can also add Steps, Attachments, an image, and associate Equipment/Supplies by clicking each button.



In Attachments, you can link to the following cloud storage services:



Once you authorize the connection to your storage accounts, your credentials will be maintained for continued easy access.

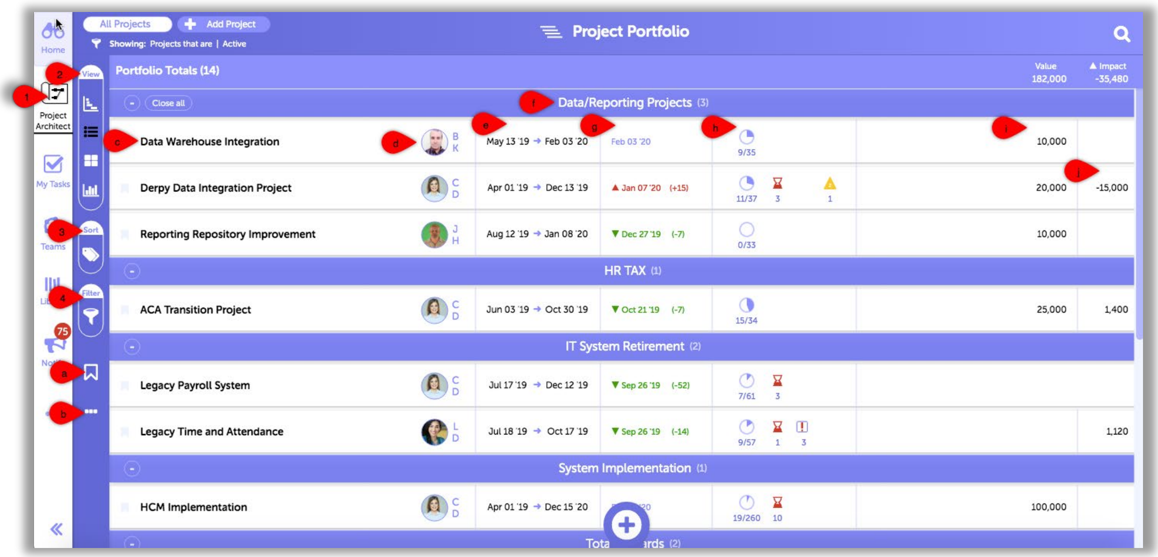
10. Click **SAVE** or **SAVE + CLOSE** at the bottom of the form to save and assign the SmartTask.

Become a Project Architect

Project Architect helps you streamline processes and collaborate across your organization to efficiently manage work initiatives. Moovila's Critical Path Engine™, a vital Project Architect feature, delivers a clear picture of project health by calculating your odds of success in real-time so you can adjust to delays, communicate plans – and changes, and easily track project status to deliver on-time and on-budget.

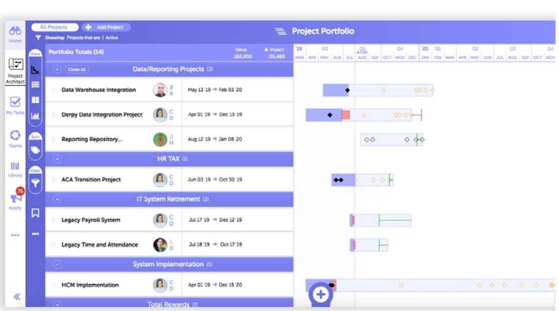
ACTION: Explore the Project Architect's Project Portfolio

Follow the numbers in the images below and their corresponding instructions to get to know your Project Portfolio.

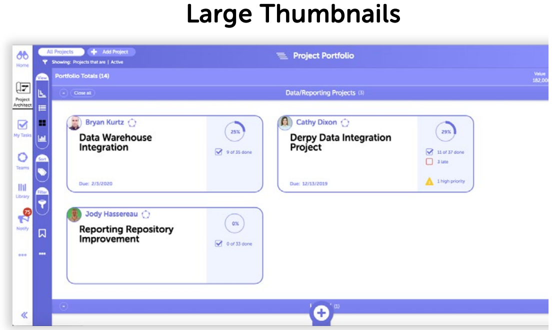


1. Go to your Project Portfolio by clicking **Project Architect**.
2. Click through the **View** options to see different options for displaying your project listing. By default your Project Portfolio will display in List view, but the system will remember your last choice next time you log in. Other views include:

Gantt



Large Thumbnails



3. Click through **Sort** options to see different grouping options available for your projects. These include Name, Owner, Team, Project Scope, Program, Category, Priority, Open Issues, Due Date, Recently Changed, Value and Financial Impact.
4. Click the **Filter** icon to review options. These include filtering by Status (Active / Completed / Archived), All Projects, Projects Involving You, and Project Type (Projects / Templates).

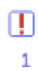
   Note other elements of the Project Portfolio screen:

   a. Bookmark Icon: Click to view bookmarked projects
   b. Other Icon: Click to import a project from MS Project

c. Project Title
d. Project Primary Leader
e. Planned Project Duration (displays start date → end date)
f. Project Category: Reflects how the projects are being grouped via the Sort function
g. Forecasted Project End Date: Displays the date that a project is forecasted to end without intervention. Dates in purple will end on-time, dates in red are behind, and dates in green will finish early.
h. At-a-Glance Status Icons:

SmartTasks Complete: In this example there are 26 out of 57 SmartTasks complete in this project.

Overdue SmartTasks: In this example there are 10 overdue tasks in this project.



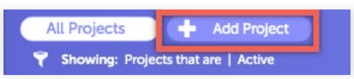
Blocked SmartTasks: In this example there is one task that a team member has marked as "blocked."

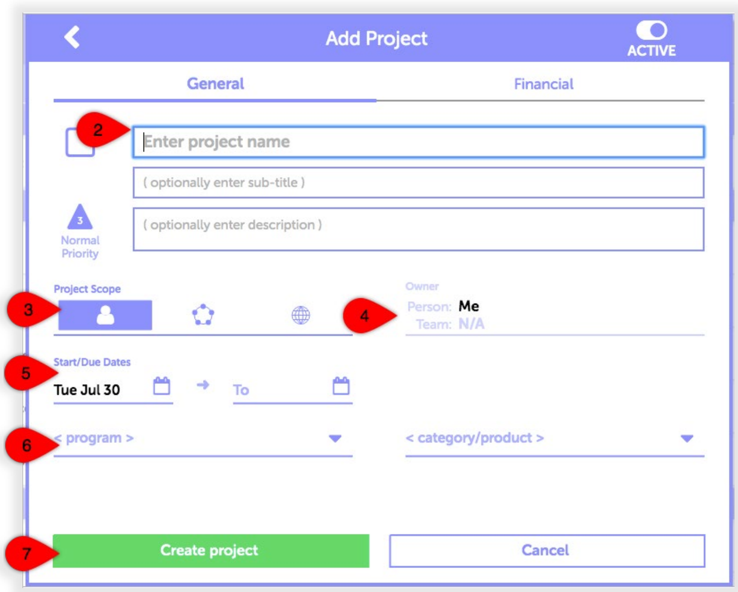
SmartTask Priority: Depending on the task's priority, this triangle will appear in red (critical) yellow (high). In this example there is one critical task in this project.

i. Assigned Project Value
j. Assigned Project Financial Impact

ACTION: Create a Project

1. Go to Project Architect by clicking **Project Architect**, the second icon in the left navigational menu bar. Then click the **+ Add Project** button in the top right, next to All Projects. The Add Project window will open.

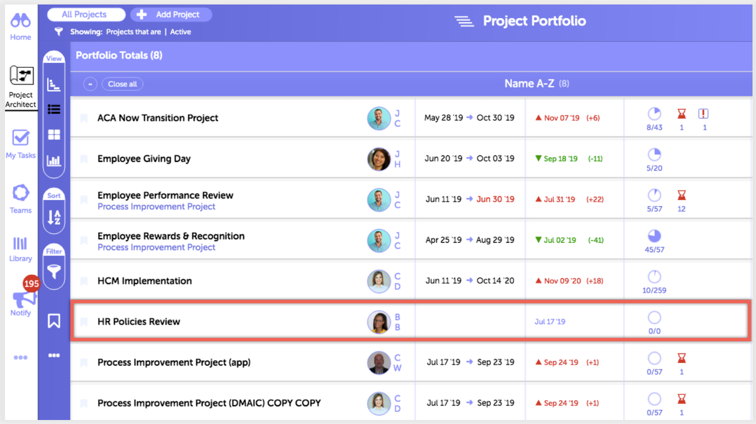




2. Enter a project name. And, optionally provide a sub title, image and/or project description.
3. Set the project scope: Personal, Team or Enterprise depending on who you want to be able to see and engage with your project.
4. Assign the Project Owner: First select the **Team** icon, then click the dropdown to set the Project Owner. This prompts the Team list. Select an avatar of the project owner, from the desired team to set them as the Project Owner, in that associated Team.
   Set the project Start / Due Dates. The Due Date is optional, and the Start Date is required to save a project.
5. Choose a Program and/or Category/Product for your project, if relevant.

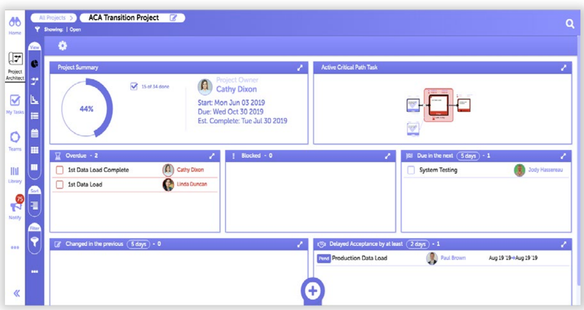
6. Click **Create project** at the bottom of the form to save your project.

7. Open the project you just created by clicking on the project in the list.

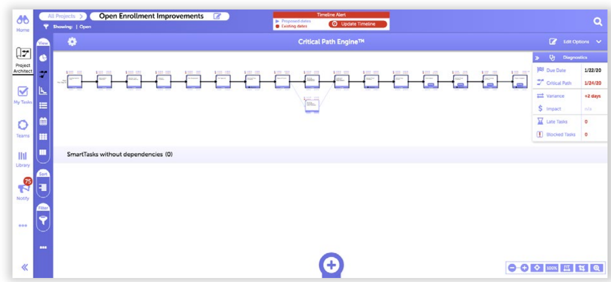


8. Click through the options in the **View** panel.

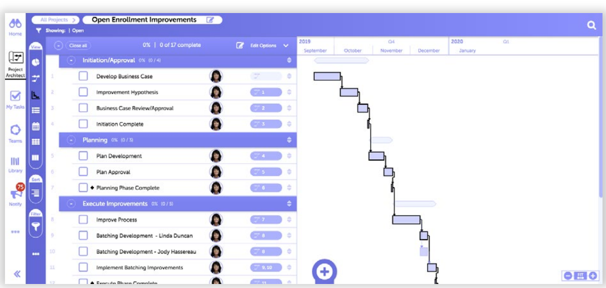
Dashboard



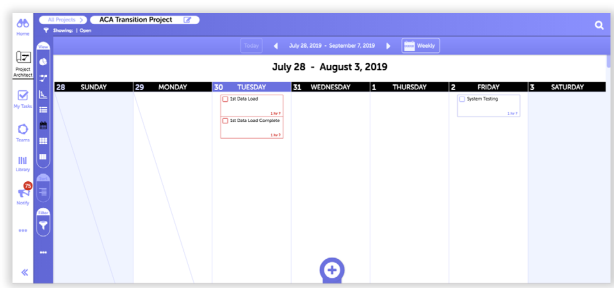
Critical Path



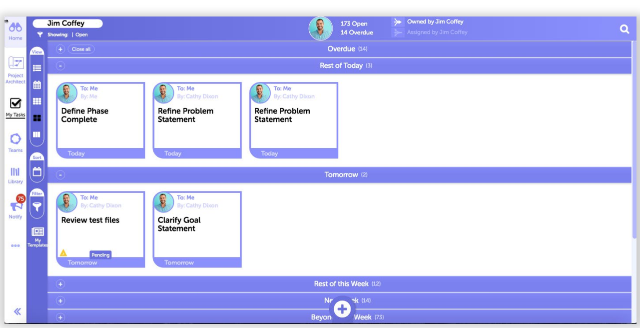
Gantt



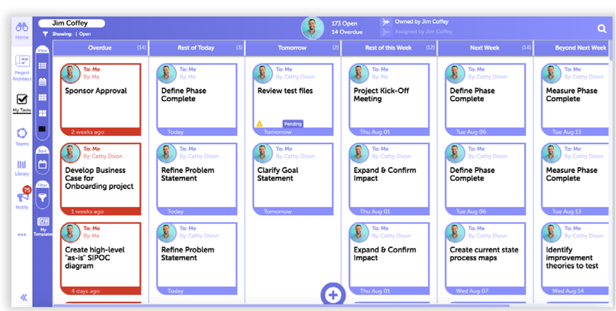
Calendar



Large Thumbnails



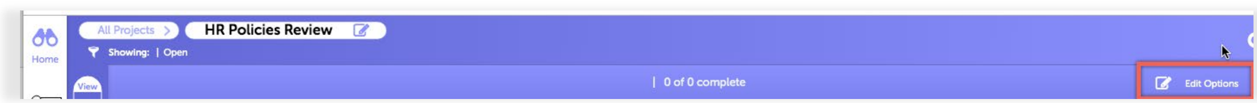
Kanban



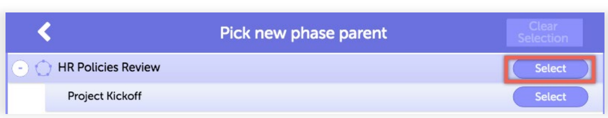
9. Click **Edit Options** in the top purple bar. Let's take a moment to review the actions available via this menu:

Edit task dependencies	Create and edit relationship or linkages between SmartTasks.
Edit project details	Opens the Edit Project window so that general or financial details about the project can be updated.
Batch edit	Modify several SmartTasks or phases at once, changing the owner, phase, status or priority.
Batch delete	Simultaneously delete multiple SmartTasks.
Add a phase	Insert a new phase (grouping of SmartTasks) into the project.
Duplicate a phase	Save time by copying an existing project phase.
Move a phase	Shift a phase's hierarchy in the overall project or move to a new or different project in your portfolio.
Delete a phase	Remove an unneeded phase from the project.

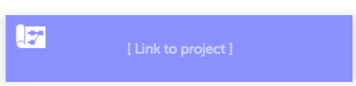
10. Select **Add a Phase** to create grouped phases within your project.



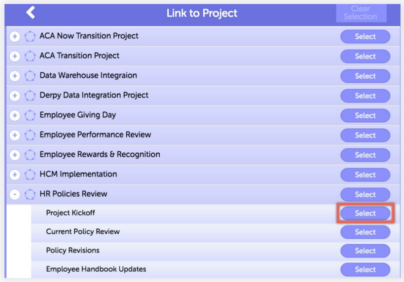
11. Enter a phase name, and optionally a description. Click **Create phase** to save it. (Double click the phase bar to edit the name and description at any time after saving.)
12. To add another phase, click the **+ Add Phase** button again. This prompts a form for selecting where your new phase will go. Hit the **Select** button in the phase you would like the new phase to be nestled under.



13. To add a SmartTask to the phase you are in, simply click the  button at the bottom of the screen. This will prompt a SmartTask creation form, which will auto-populate the project association with the phase of the project you are in.
14. To associate an existing SmartTask with your project:
    a. Go to My Tasks via the left navigational bar. Open the SmartTask detail of the desired task.
    b. Click **[click to edit details]** at the bottom of the SmartTask.
    c. Click the **Link to Project** button in the top right of the SmartTask to prompt Project Link form.



    d. Expand the desired project to the phase you would like to add your task to. Then hit **Select**.

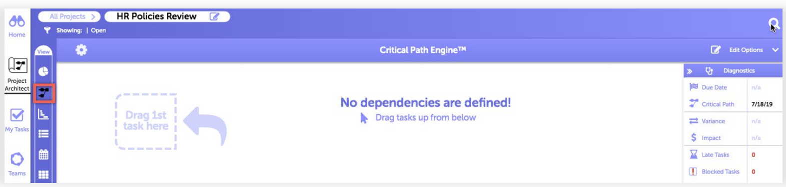


e. Press **SAVE** / **SAVE + CLOSE** on the SmartTask detail.

ACTION: Explore the Critical Path Engine™

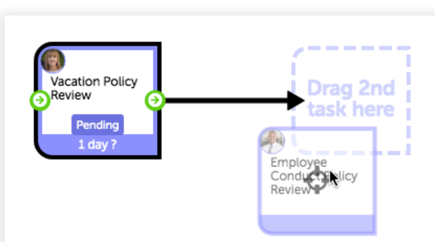
It is important to create dependencies or relationships between SmartTasks, so that at the start or completion of one SmartTask, the next SmartTask in that series may begin. This is the foundation of identify the Critical Path, which determines the timeline and minimum number of days required to complete a project.

1. Open your new project.
2. In the View section of the left navigational panel, select the **Critical Path** icon from the menu.

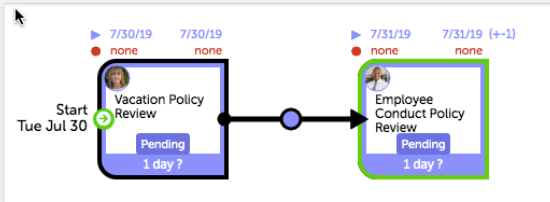


3. Click on one of the SmartTasks in the "SmartTasks without dependencies" section at the bottom and drag it to the area marked "Drag 1st task here".

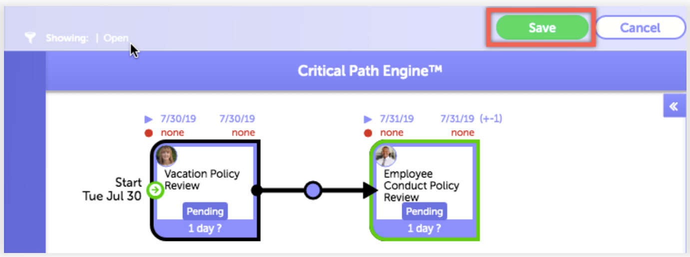
4. Then, drag another SmartTask without dependencies to the area marked "Drag second task here".



This creates the Critical Path. You can continue to stitch together dependencies from here.



5. Click **Save** to save your dependencies.

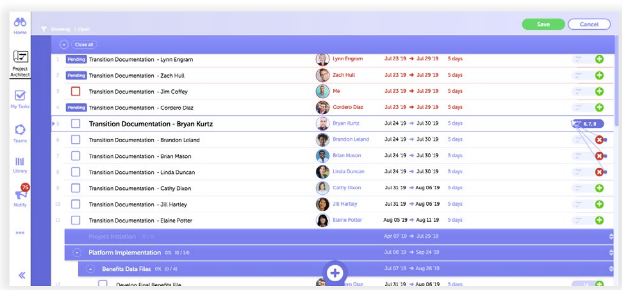


This prompts a message asking if you'd like to save dependencies and update task dates, in addition to the option of sending date change notifications. Select **YES** or **NO**, then **ON** or **OFF**, and **Save**.

NOTE: SmartTask dependencies be accessed and edited via Gantt and List views as well.

Gantt

List



To dive deeper into Critical Path functionality, please reference the Moovila User Guide.

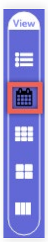
Manage capacity and prioritize work with SmartSchedule

Get an accurate view of availability by integrating with Outlook or Google Calendar to include all commitments (SmartTasks, meetings, holidays, etc.) to calculate and manage capacity in one place. Finally, the power to effectively balance workload and relieve overburdened contributors.

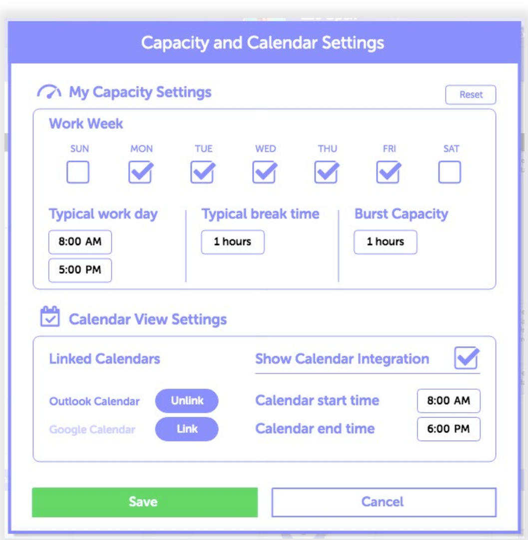
SmartSchedule prioritizes your work for you, shows you when to work on what and forecasts which SmartTasks are at risk of being late to optimize efficiency and ensure on-time execution.

ACTION: Link Outlook calendar

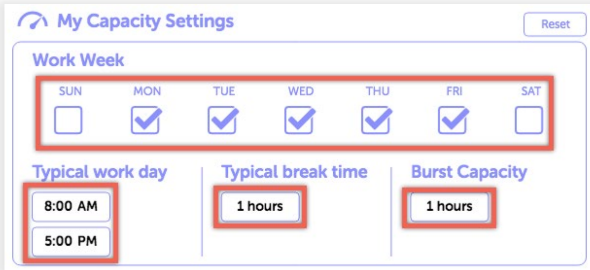
1. Click on the **My Tasks** icon in the left navigational menu bar. Then click the **calendar** button in the upper left View menu.



2. Click in upper left of header bar to open Capacity and Calendar Settings.

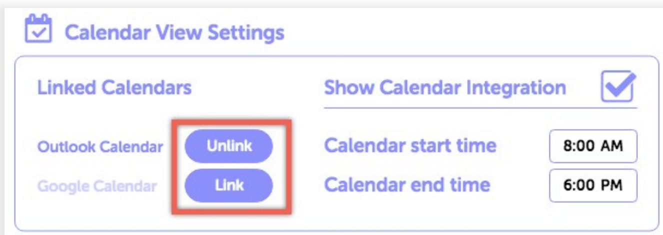


3. Update Moovila with your typical work schedule in My Capacity Settings.

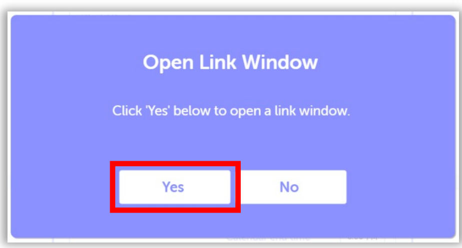


   a. Select the days in your typical work week.
   b. Set times of your typical work day.
   c. Enter length of typical break time.
   d. Enter Burst Capacity or time available for overtime each day.

4. Click **Link** button in Calendar View Settings to link your Outlook or Google Calendar.

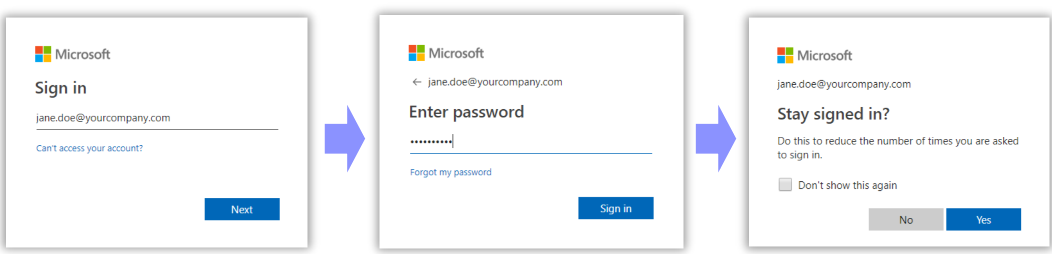


5. Click **Yes** on Open Link Window pop-up to be redirected to your Microsoft or Google login.

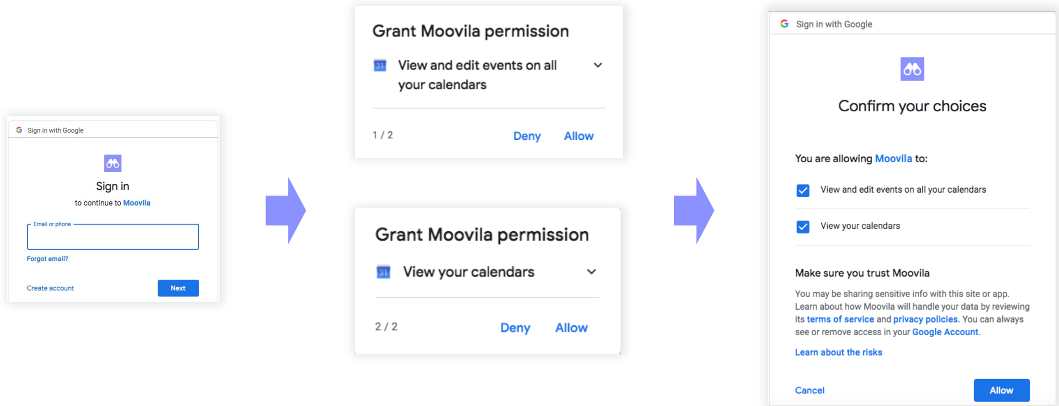


6. Enter the email address and password for the account(s) to be linked.

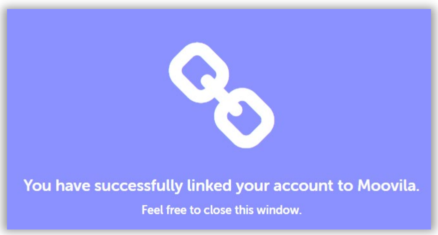
For Outlook:



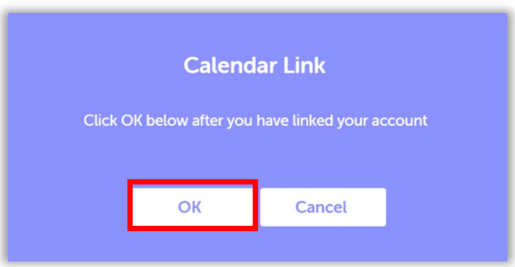
For Google Calendar:



7. Success message will be displayed, window will close, and you will be redirected back to Moovila.



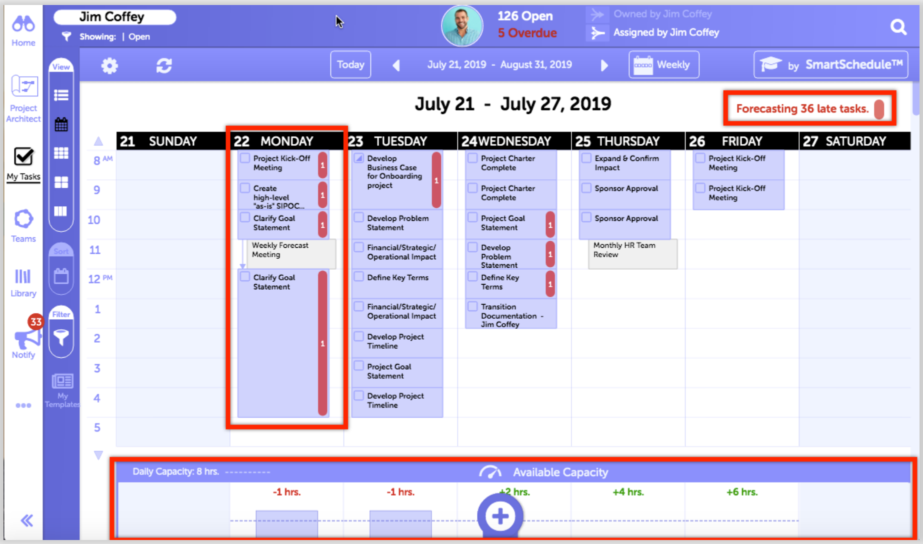
8. Select **OK** from pop-up window.



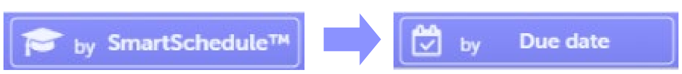
9. Click **Save** to complete linking of calendar(s).

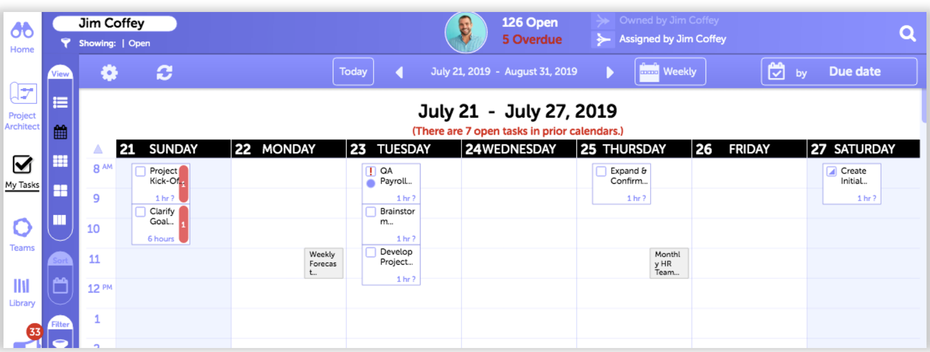
ACTION: Start using SmartSchedule

1. Once your calendar is linked to Moovila, your meetings will be displayed in gray in SmartSchedule calendar view, and SmartTasks will be displayed in purple. SmartSchedule is able to automatically prioritize SmartTasks based on your calendar availability plus the priority, due date and time required. SmartSchedule also assists in forecasting work capacity and SmartTasks at risk of being late.



2. Click **by SmartSchedule** in the upper right corner of header bar to switch to Due date view, which will display your assigned SmartTasks by due date.





Discover and share in the Library

Your Library is the place to share documents, templates and attachments. You can publish to Enterprise channels or directly to Teams, depending on who you want the audience to be. Enterprise channels are defined by your Enterprise and visible to everyone in your Enterprise. Team channels are only visible to the members of that Team.

To add something to the Library, publish a SmartTask. Then, the published SmartTask becomes an actionable item that can be shared with and/or assigned to teammates.

Stay in the know with Notifications

Keep an eye on your Notifications to see updates on work that's been assigned to you and the status of work you've assigned others. You'll also receive notifications on Team invitations, as well as nudges and pats.

You can adjust your mobile and email notification settings in your Profile, which can be found under the [Options Menu.]

To explore other formatting options for your Notifications, click through the icons in the View toolbar in the left navigation.

Remember the Options Menu

From updating your Profile and managing password to contacting Support, the Options Menu contains a robust set of functionality.

My Profile	Put a face to your name and let people know who you are and what you do in you organization. Also, configure notification and interface settings.
Timecard	Log time associated with your projects and SmartTasks to track time spent and ai future planning.
Logout	Log out of Moovila.
Change Password	Easily change your password.
Switch Accounts	Create multiple Moovila accounts and simply switch between them without havin to log in/out.
Refresh	Refresh your experience to make sure your data is fresh.
Support	Questions? We’ve got answers – in the form of FAQs, user guides and a form to contact Support directly.
About Moovila	Find the latest Moovila Version information and more.

Put it in park

This concludes the script portion of your Moovila Quick Start. Please continue to explore the solution with your team, and we will be here to answer questions, give additional guided tours or help you define your use case more clearly.

Questions?

We've got answers. Contact us anytime for help using the platform, soliciting feedback or with general questions.

FAQs & Support Form
moovila.com/support

Email Support
support@moovila.com