User Manual

Introduction

TeamingWay is a one-window project management and collaboration tool that has unmatched functionalities and features including task management, host team meetings, real-time chat, alerts, and many more. This software is designed for the team to meet, collaborate and manage teamwork seamlessly on a single platform. It comes with a web-based solution along with the mobile compatible app that enables users to have all project management tool facilities through this one work OS.

Benefits of TeamingWay as your collaboration tool

Keep your teams intact and users connected. TeamingWay gives its users a way to have complete control over their projects.

- Project managers create and can track their goals.
- Create reports and share them in real-time.
- Chat, meet or call for any short or long sessions.
- Automate emails to eliminate the hassle of manual task assignments.
- Manage teams and handle projects through a single platform.

Chapter no 1

Goals

Set the goal by creating new goals in Teamingway. Add the tasks, divide them among the team members, set milestones and timelines, and prioritize for better performance.

Each project has different criteria, and to accomplish each of them, you must set separate goals for it. Depending on the project or goal requirement, you can set it public or private, giving access to relevant stakeholders.

Users can also use the recurring task to auto-populate in the TeamingWay calendar, and you will always have full information on the important tasks.

Benefits of Goals

The goal is to help teams get more organized with their projects. It helps users to:

- Set goals as per the planned milestones.
- Add members for exclusivity.
- Add tasks to achieve a goal.
- Categorize for clarity.
- Track each goal according to the department.
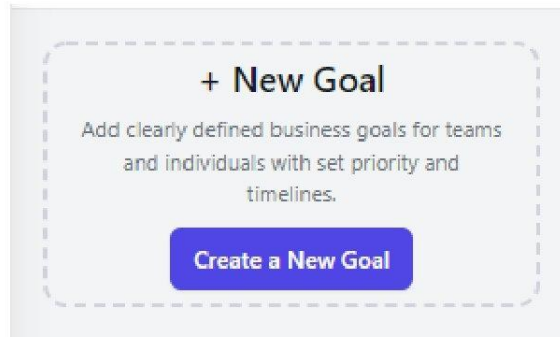- Stay on top of your deadlines.

How to Create A Goal?

- **Go to Goals list**

User will launch the TemaingWay and navigate to the **Dashboard**. Next step is to go to the "**Goals**" and click on it to access the goals list
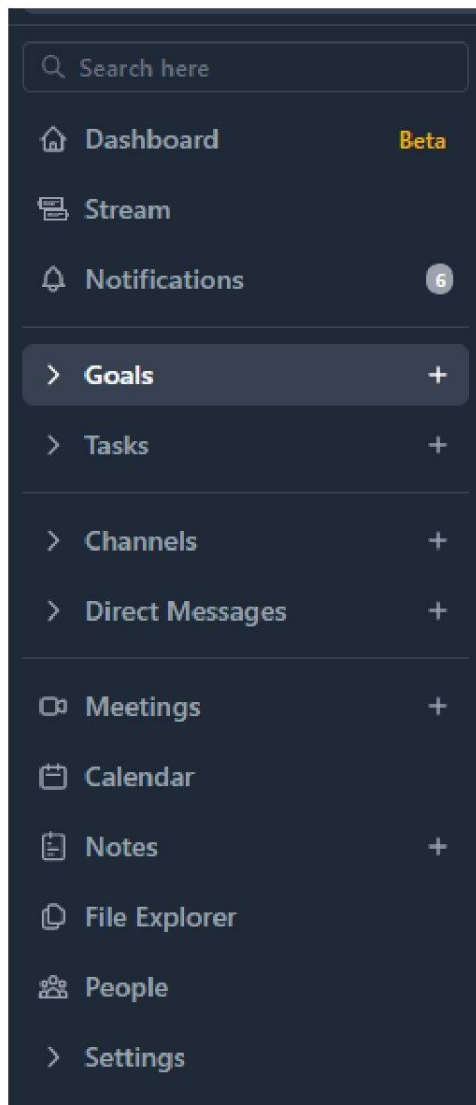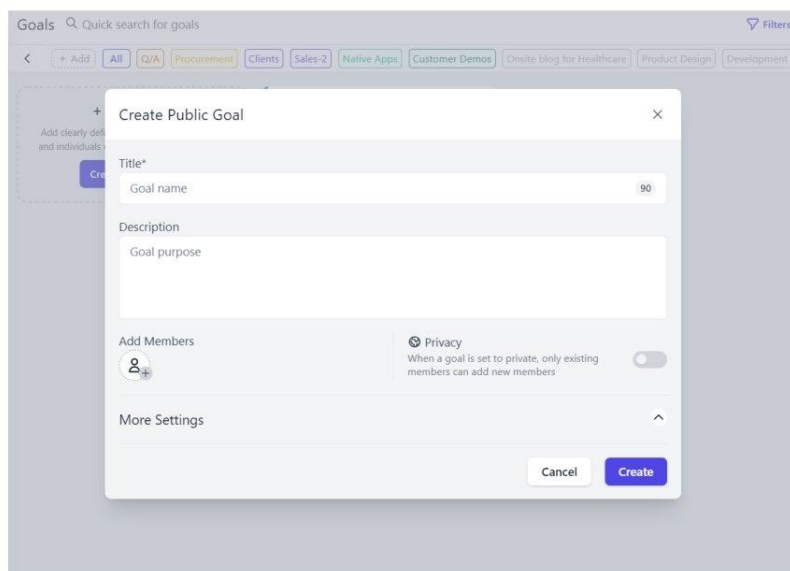
- **Create a New Goal**

Users can see the "**Create a new goal**" click on it and you can create a new goal by filling out all the necessary details.

- **Add your Goal Details**

Users can fill out the form with all necessary details. Only the goal name is required, everything else is optional:

● **Your Goal is Ready**

Users need to cross check the information before hitting "**Create**". On the goal card, you can see the department, members, number of tasks, tasks completed in the form of percentage and privacy, either public or private.


Additional Features of Goals

Users can have a vast number of features helping them at every step of the project. It assists them to be more clear and comprehensive in every way.
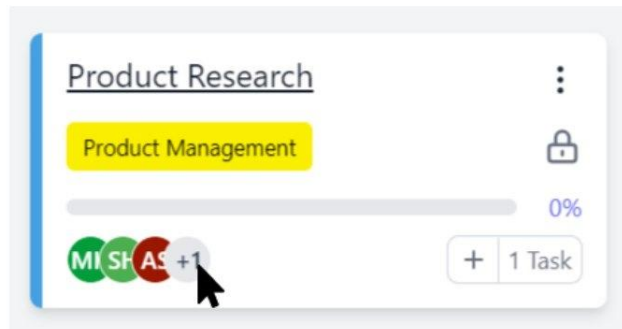
● **Set the Category of each goal**

Using the category option, add the purpose of the project or define the associated department through it. Users can keep each goal separate and easy to filter out.
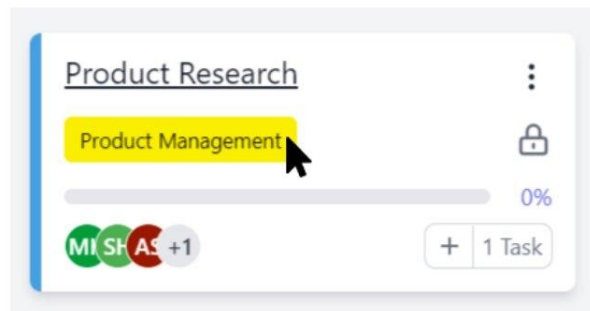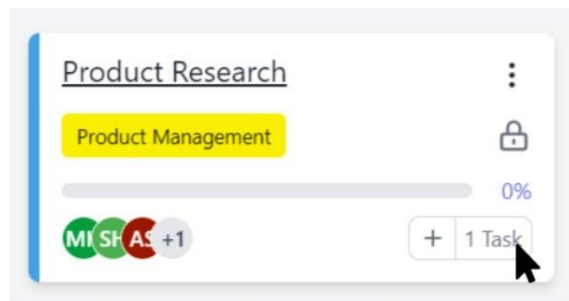
● **View all the members of the goal from a card**

Each user can view the list of members by clicking on the members visible on the card.

● **Check the number of tasks from the card.**

Users can view the count of tasks and if there is a demand or need for a new task, click "+" to get it done.

● **Each vertical has a color to show the priority.**

The color on the vertical defines the priority of each goal. Administrator or the creator of the goal can assign the colors as per the need.
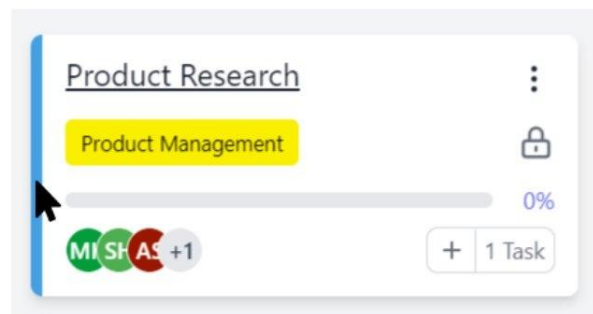
● **See if the goal is public or private**

Custom setting of the privacy is to see if the goal is public or private. This status is decided by the creator of the goal and if assigned, managers can change it.
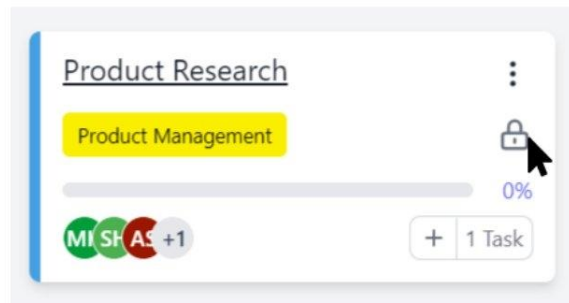

● **Easy Access to the short activities.**

Users can now perform all the quick actions just through the card. Check the three bullet buttons on the card and you can see options like meeting, notes and delete the goal, etc.
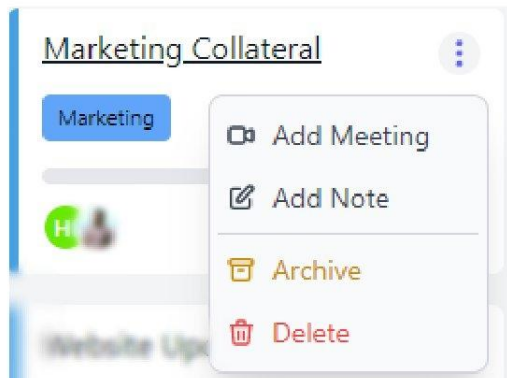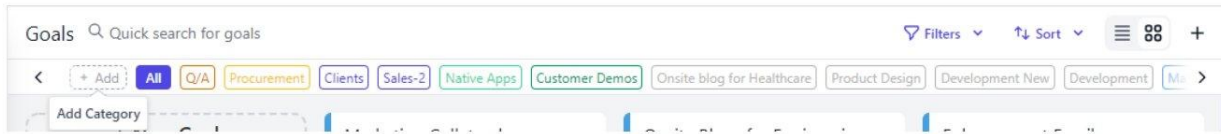

● **Sorting makes tracking easy.**

Sorting visual appeal makes the goals more interactive. The image shows the option to filter by selecting options like "All", "Sales", "marketing" or any other categories added by the user.
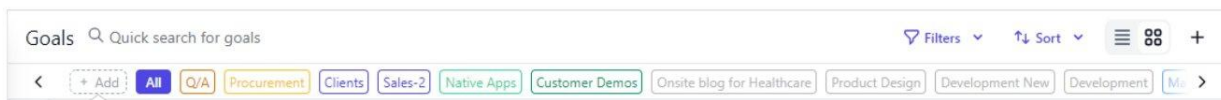
- **Select and add a category.**

If you are looking for a specific goal, you can select the category from the goals or add the new category through the ADD button.


- **Full menu of filters with numerous options.**

On the left side along with the search bar, users can find a dropdown to filter the goals and at the right top corner, there is a filter with numerous options (by clicking on it). Instead of going through all the goals, you can check them by type, privacy, priority and members to save your valuable time.
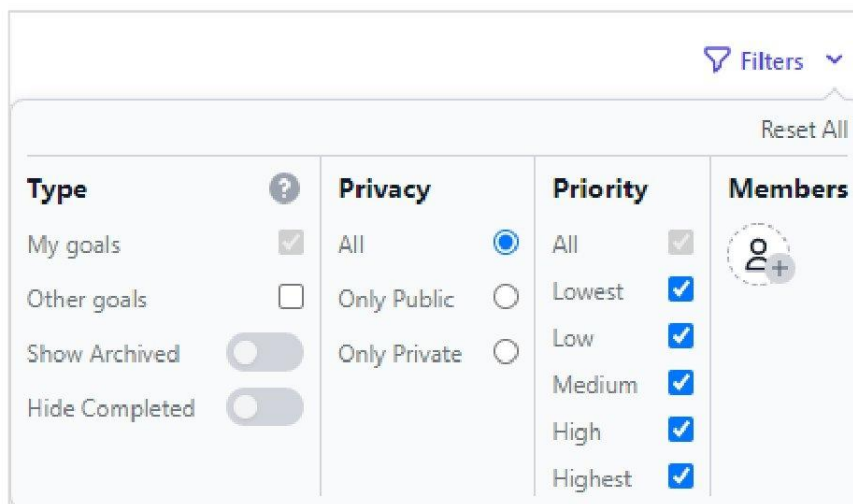
- **Sorting Option is also available**

Now, you can see your goals by sorting them from latest on the top to older on top. This is a time-efficient way to check your goals.
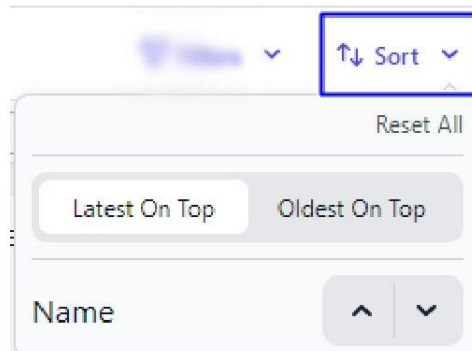

- **Set notification settings to Important**

A user can now opt to only receive relevant notifications and avoid being notified for the non-relevant tasks. Just navigate to goal settings and set the goal notification settings to "**Important**".
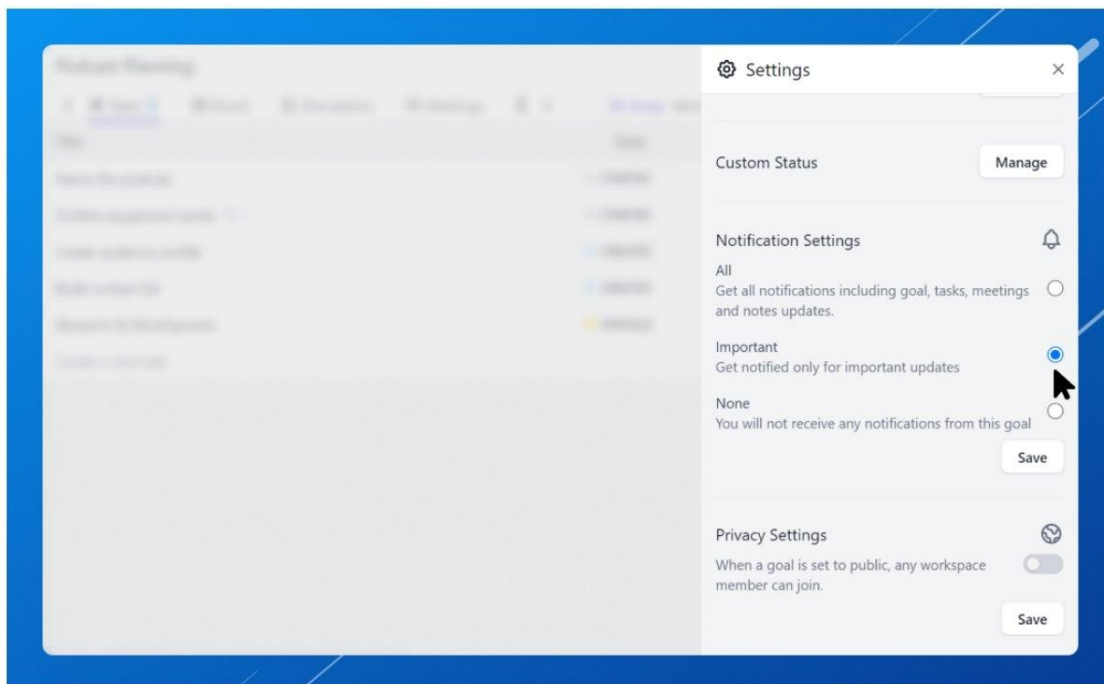
- **Add Goal members or remove**

A user can find **Add goal members** option to the top right corner. You can also see all the goal members there, and remove them as well directly from the list.

*Note: Remove member option is only available for Goal Owners.*
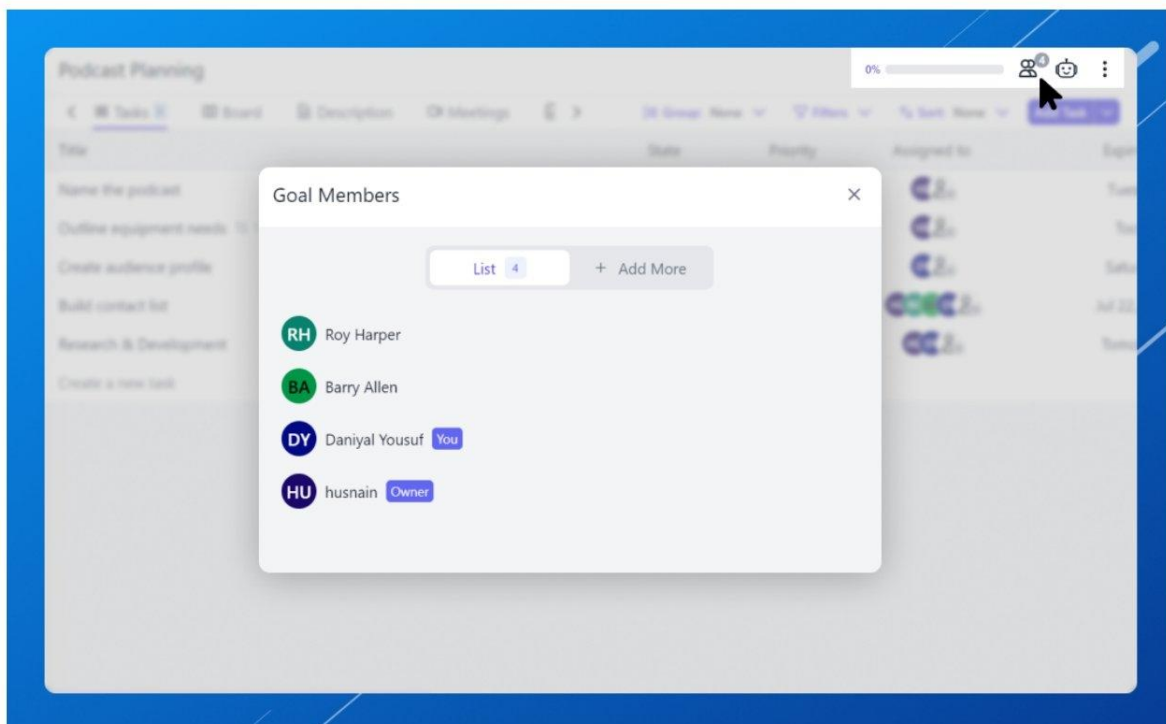
- **Directly change goal title from the header**

If you want to change the name of your goal, you have an option to do it directly.Just open your goal and you will find the rename option at the top of the task list.
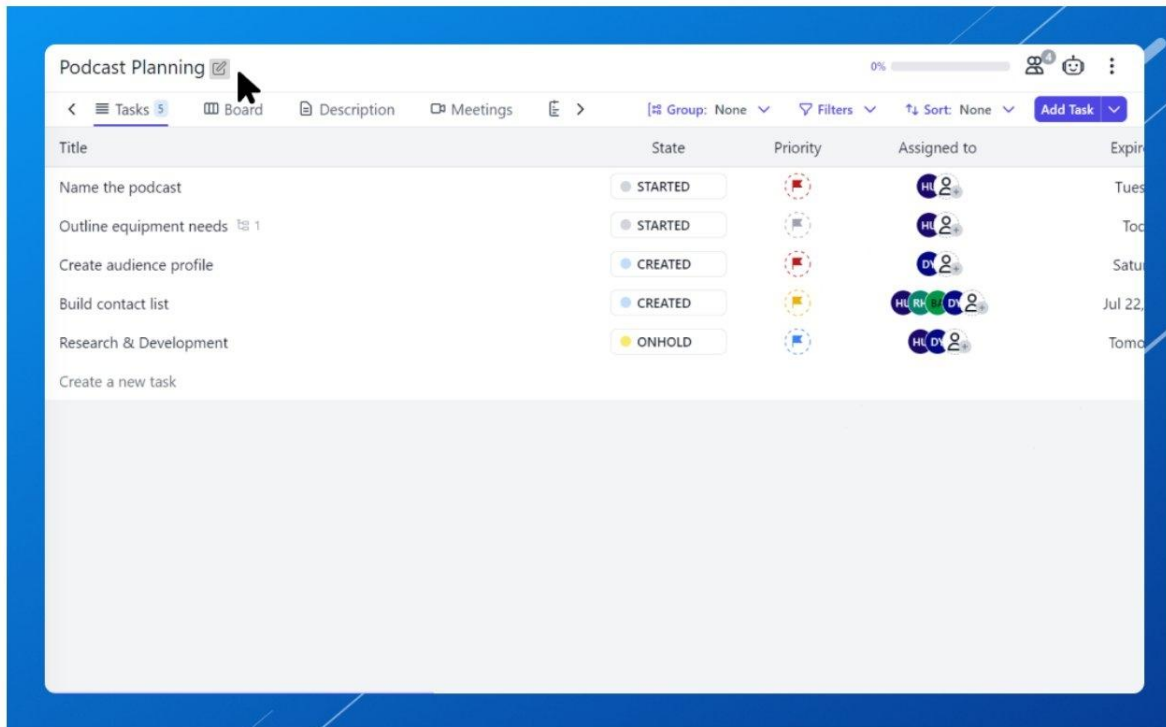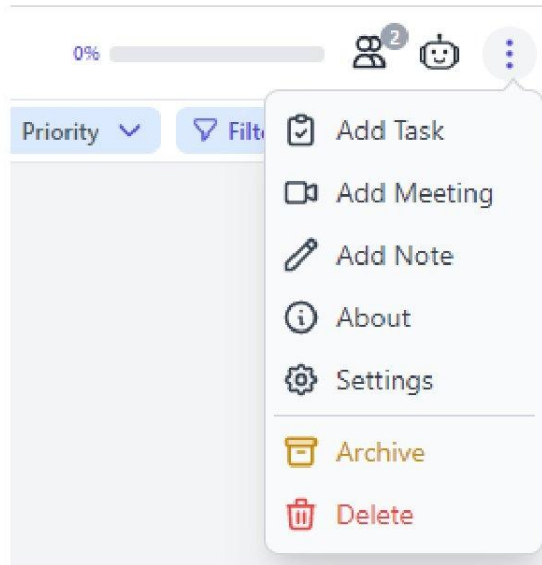

How to check Goal information?

To check the particular goal information, go to the desired goal and open it.
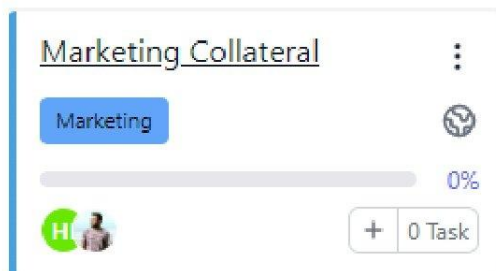
When you open the goal, you will find three dots at the top right corner. Click it to open the options and select **About**.

Upon clicking About, a user can see the goal information including goal name, purpose, owner, privacy, priority, and category and when it has been created.
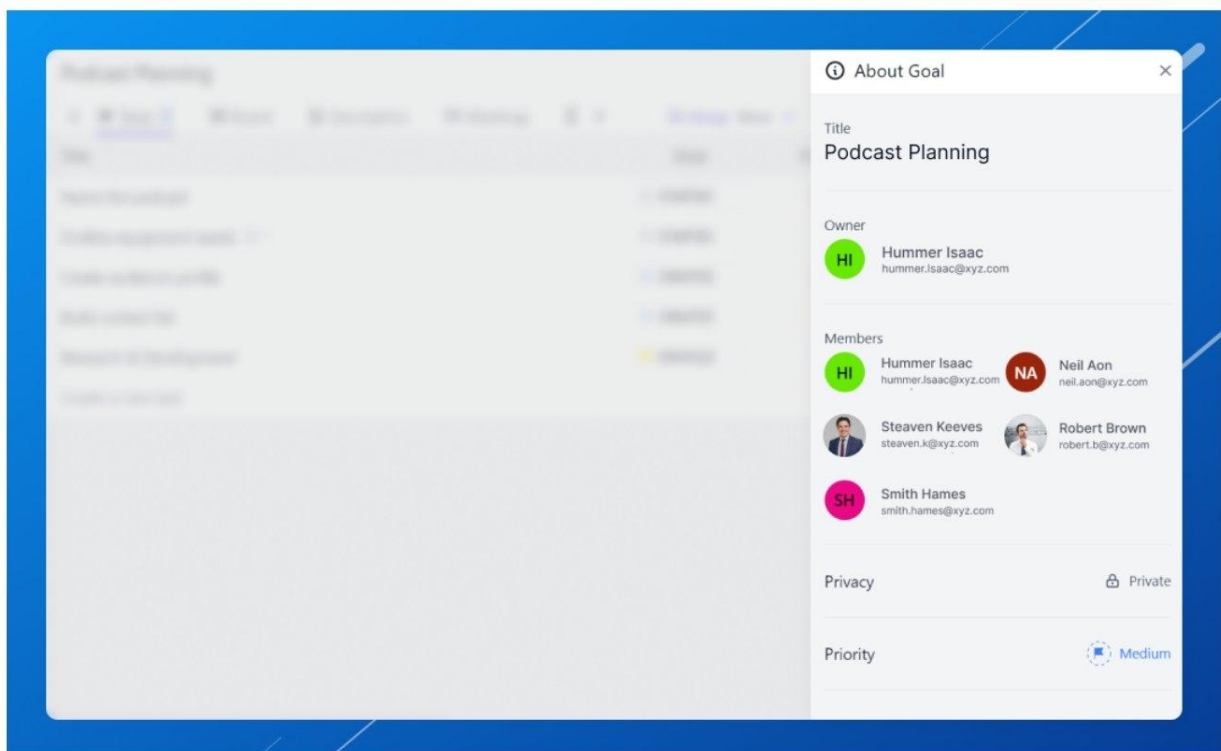
A user has an option to change the goal owner. Created a goal, but want another person to manage it now? Use the **change goal owner** option and appoint anyone else as **Goal Owner**
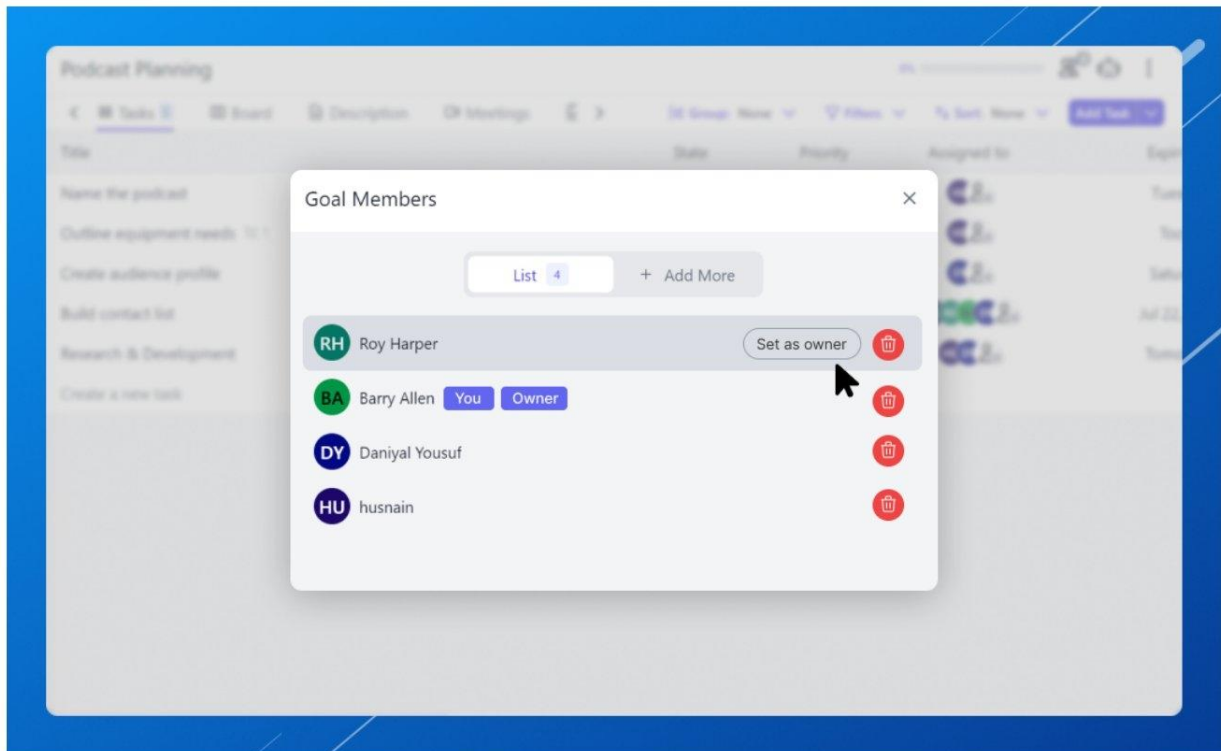
Chapter no 2

Tasks Management

The Task management feature allows you to have complete control over the tasks through a single platform. Organize, assign, prioritize, set the deadlines and schedule them for the members as you need them. You can also decide which tasks are the priority.

Task management also allows you to keep track of your goals and be aware of the progress of each member's tasks. This gives users a clearer view of their tasks and maintains the pace.

Benefits of the tasks management

The tasks management feature helps you manage the project's productivity and have better visibility of each task. With the task's creation, you can:

- Work compilation under a single platform
- Reliable remote access
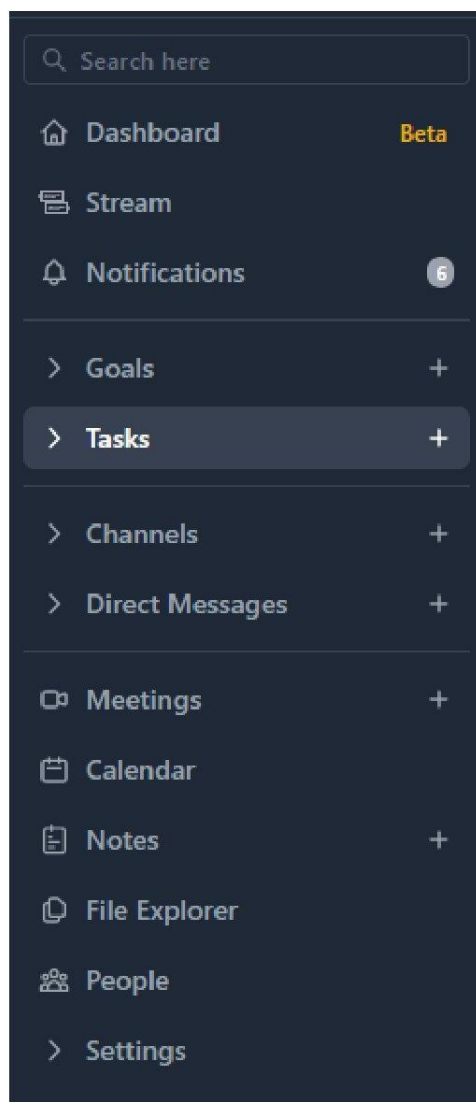- Easy collaboration and sharing
- Clear analysis of the projects

How to Create a Task

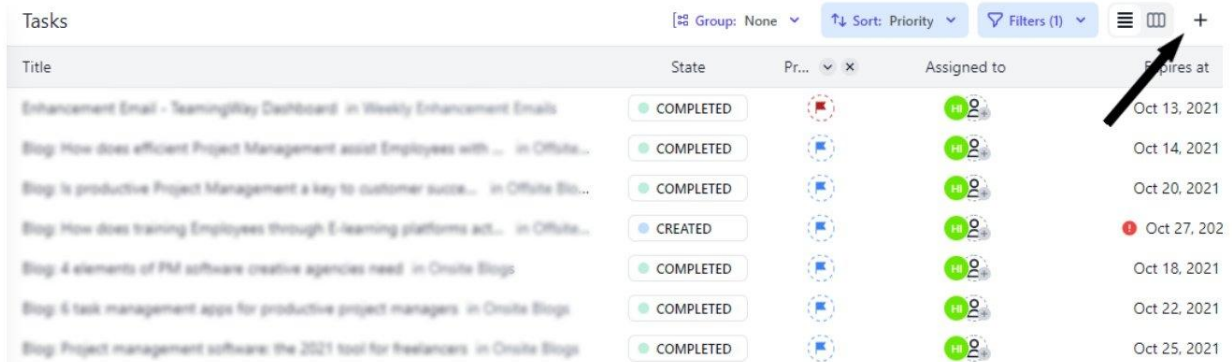In TeamingWay, users have 2 ways to create the tasks:
- ➔ Create tasks directly through the dashboard.
- ➔ Create it from the specific goal card.

1. Create a task from the dashboard.

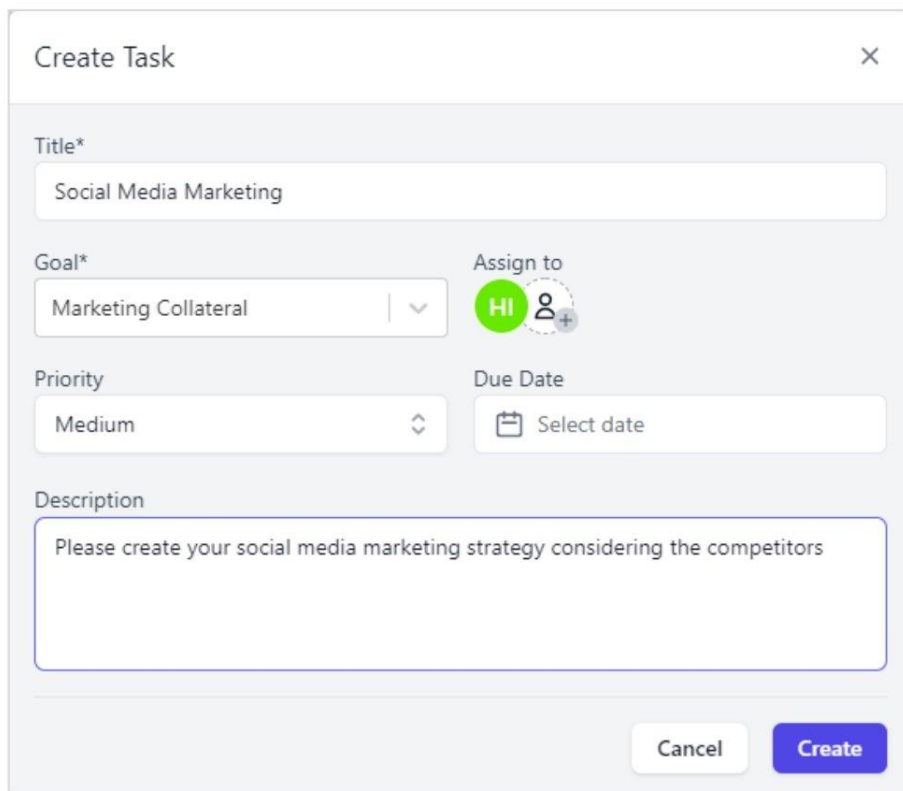Navigate to the dashboard. Click on "**Tasks**".

Then on the right corner, you will see the add task option at the top of the screen. Click the "**+**" sign for it.

When you click it, you will see the screen as follows below. Just add the right information of your task and here you have the freedom of adding the task to any goal of your choice and as per the requirements.

Just put the right details to every field and your task is ready.

2. Create a task by going to the particular goal

Go to the Goals from the Dashboard.
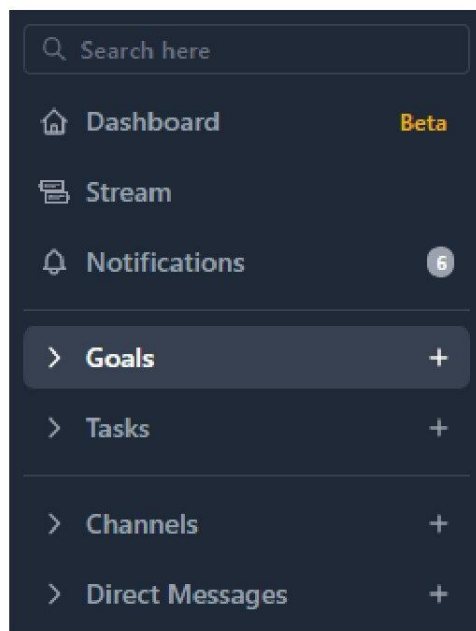
Bring your cursor to the goal you want to add the task to and click "+".
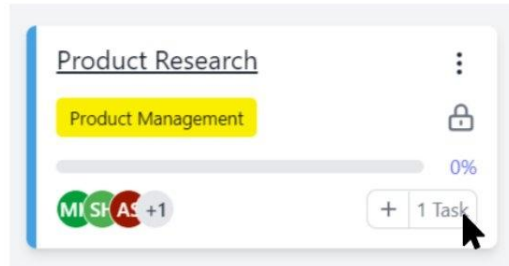
Here just add the details of your task just like you could add in the first method.

Now, click "**Create**" and you will be done. You can then see the task added in the list.

Chapter No 3

Messaging

Real-time chat and messaging are the ways to stay close and connected for better collaboration. Discussions for the projects are never-ending, and streams, direct messages and channels come immediately to help you keep the flow of communication. Share files, chat, create threads, and stay in touch with your teammates.

Coordinating among the teams is no longer quite formal. Considering these changes and shifting of the way colleagues collaborate brings more elaborate chatting solutions. TeamingWay gives you an informal yet an organized way to reach out to each other with the needed information.

Benefits of Messaging

Communication is the main key to ensuring you are working as a team. The messaging feature keeps the flow and makes teams brainstorm together even if they are far away. They can always save the streams and chats to read them later too.

- Keep a record of your messages
- Share files and project details
- Reach out to each other and help through the project

How to check the stream

To check the stream, you just need to click it from the menu bar.
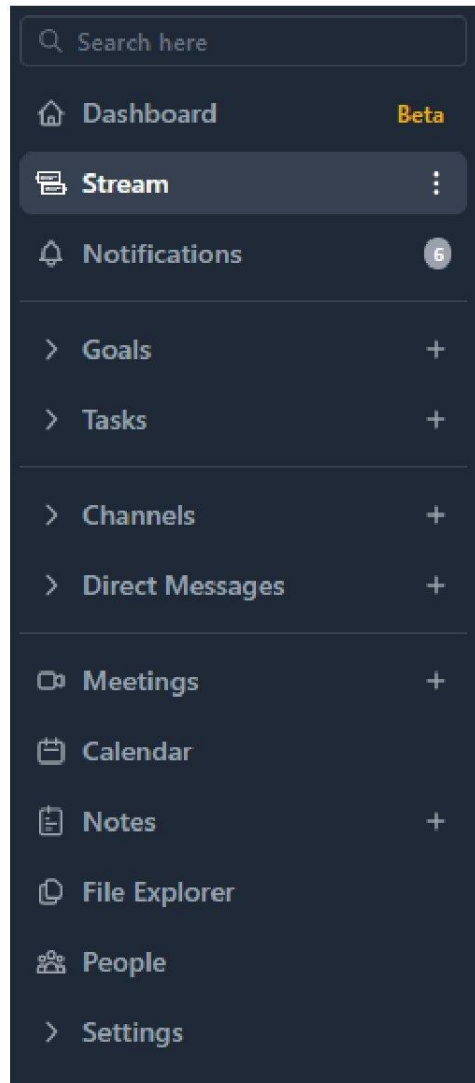
- **Mark as read**

If you think there is nothing related to your work being discussed in the stream, you can also use the option to "mark as read".
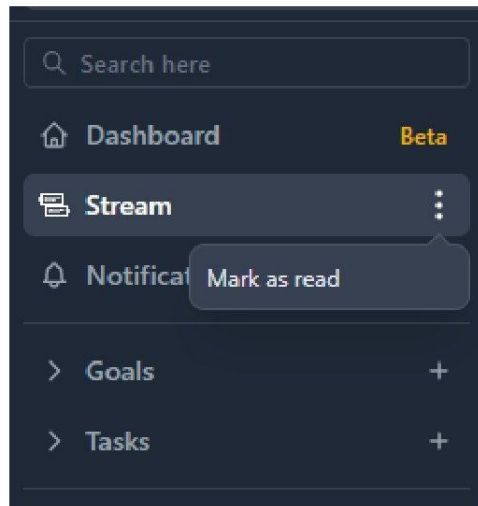
- **Organize your stream and make it manageable**

Don't make the conversation boring and use emojis. Additionally, you can quickly share the files or have a discussion to understand the major and minor details of the project.
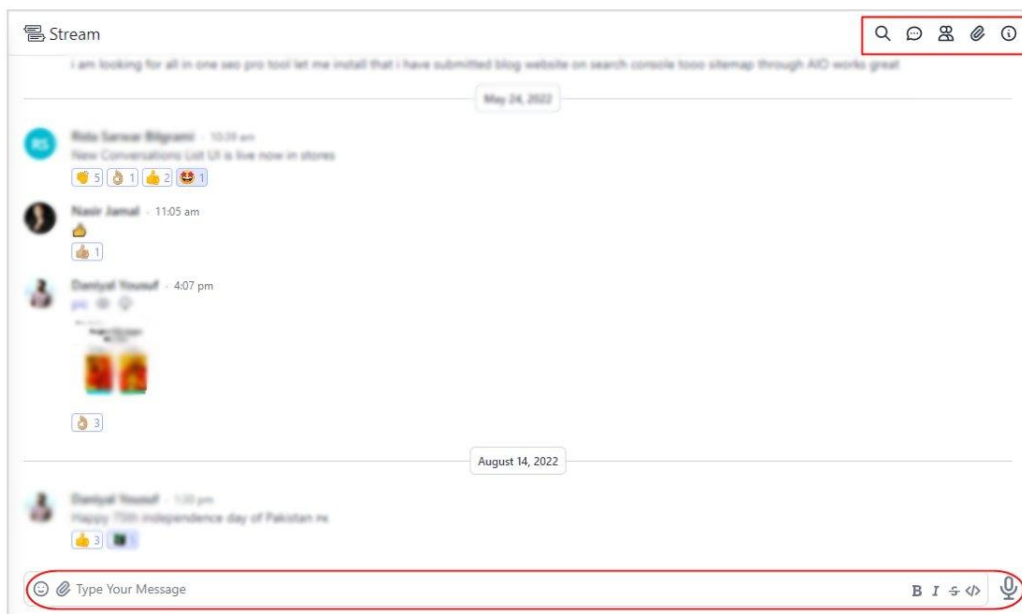
Here a user can find all the messages of his teammates and company members. Stream is for everyone. Anyone can send the messages here and everyone can read it. So, if there is an announcement for the whole company, a manager doesn't have to inform them one by one, stream makes it possible to share the news with all.

Use the search button on the top to keep track of messages, threads, members and files efficiently.

- Search Messages to filter them out.
- Search Threads to read the significant ones.
- Search Members to know which members are part of the discussion.
- Search Files to have all your files with you.

Choose the text format for your messages

- Make your messages bold using B
- Make the message Italic using I
- Share files through the attachment symbol
- To make it polite and friendly, add the touch of emoji too.

Profile Card

Click on the user avatar and it will display their profile card. It lets you quickly see a user's information directly from the conversation screen.

You can also send a **direct message** to them without going to their profile.
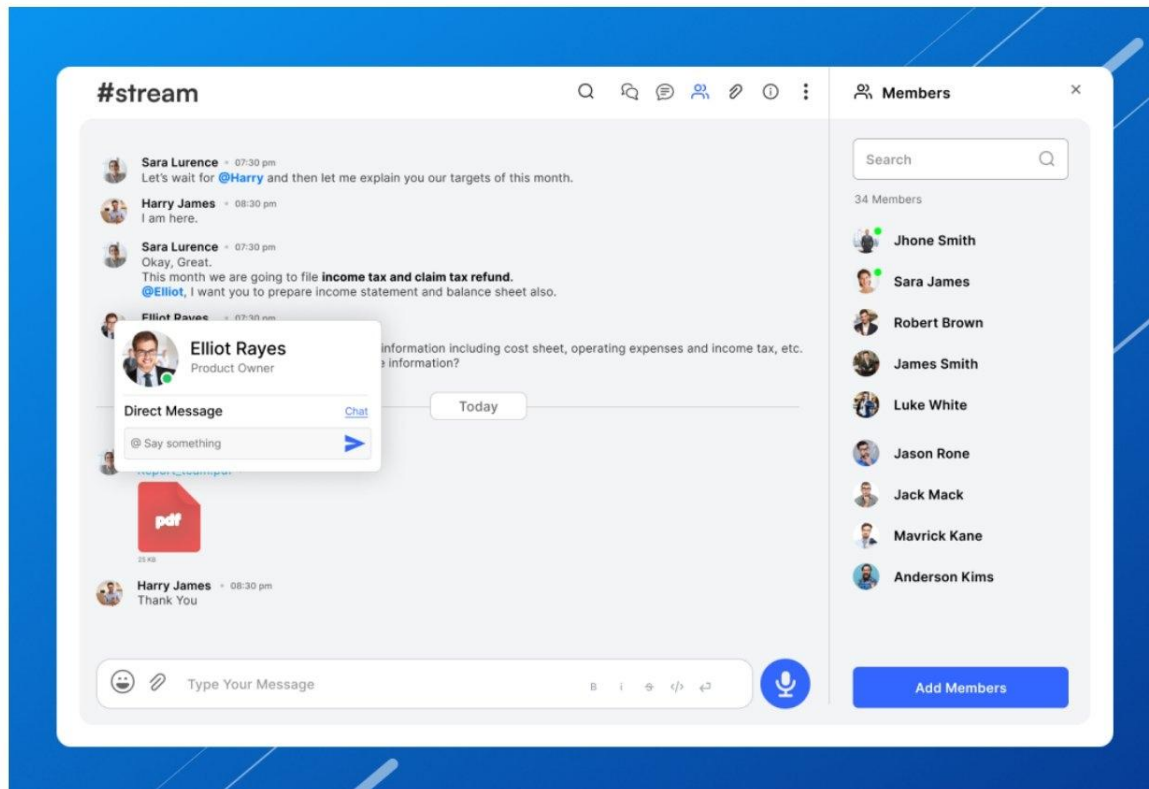
<center>**Channels/Direct Messages**</center>

How to Create a Channel

To create the channel, a user needs to click it from the menu bar.
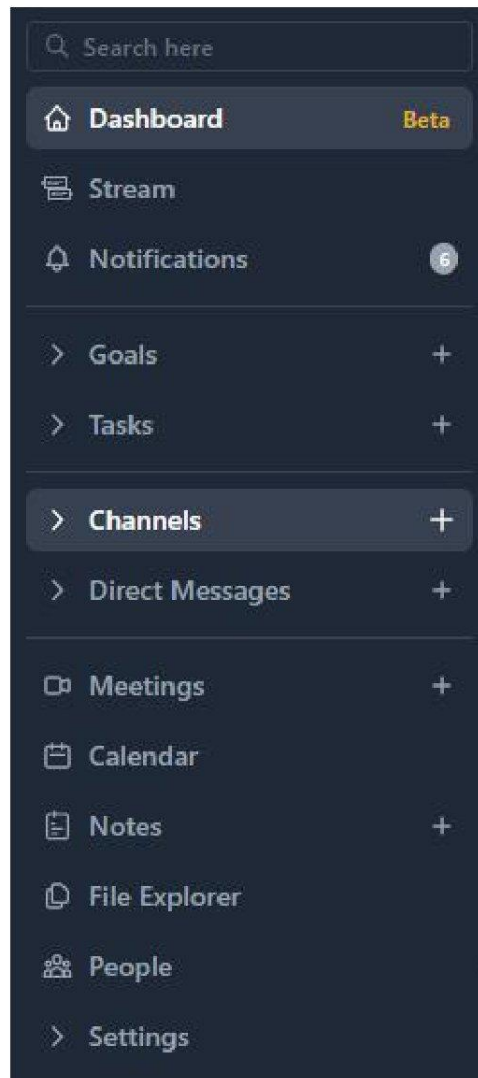
When a user presses the channel +, you will see the screen shown below. Add all the relevant information including the channel name (it can be your department or project name) and members you want to add. Then, you have some advanced options like private or public channels, set read only mode or allow all the members to participate etc.

Create Channel ×
Channels are where your team communicate

Name*
Enter channel name

Users

Public Channel
Everyone can access this channel

Read Only Channel
All users in the channel can write new messages

Broadcast Channel
Only authorized users can write new messages, but the other users will be able to reply

Cancel   Create

Now, when users go to the menu bar and click channels, they will be able to see the created channels as shown in the image below.
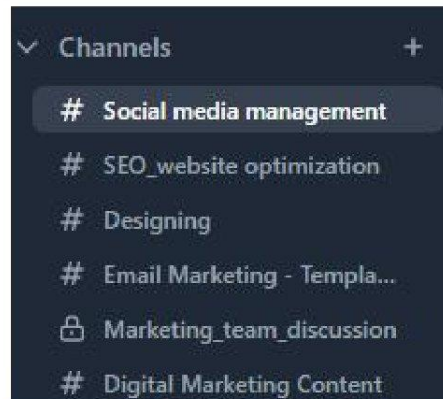
Open the desired channel and start the conversation with the selected members. You can securely discuss the projects with the members, plan the things, and share your input and output on the projects with each other.

How to create a direct message

Go to the menu bar where you will see Direct Messages.
Click + to start the conversation with a member you want.
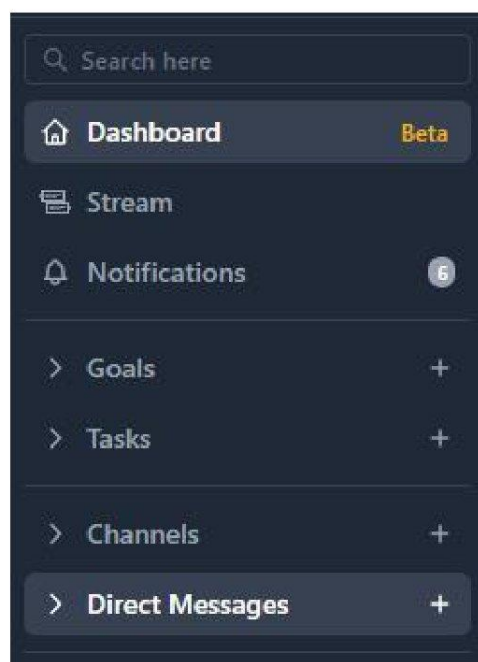
On clicking Direct messages +, you will see this screen as shown below. Add the member you want to start a conversation with.
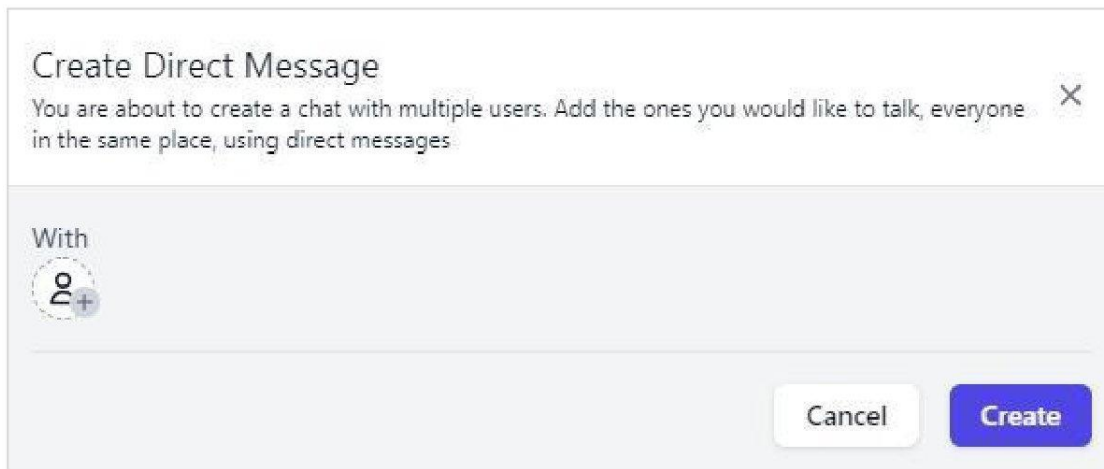
When a user is done with creating a direct message process, you will start seeing it in your menu bar, under direct messages. All the conversations with the member names. Just click one and start messaging.

Chapter no 4

Meetings

Personalize your meetings with TeamingWay and schedule them without worrying about the invitations. Once you add the members, they will automatically get notified of the meeting. Share screens, files and discuss your projects in detail during the sessions. You can also turn your meetings into conference calls with remote workers of the organization.

It has all of the standard meeting features, including scheduling, audio through call-in or VOIP, and video conferencing. TeamingWay also includes tools for recording meetings and managing the real-time flow of meetings, such as screen sharing, meeting notes, chat, and follow-up and breakout meetings.

Benefits of Meetings

Work dynamics are never the same. Reach out to teammates in-person just through the screen of TeamingWay to ensure they are clear about the project. Share your ideas and brainstorm together to achieve your goals. More benefits include:

- Check out all the scheduled meetings
- Easy to share project details
- Hassle-free video conferencing
- Secure & confidential meetings

How to create a meeting

To create a new meeting, go to **Meetings** in the menu bar at the left side of your screen and Click +.
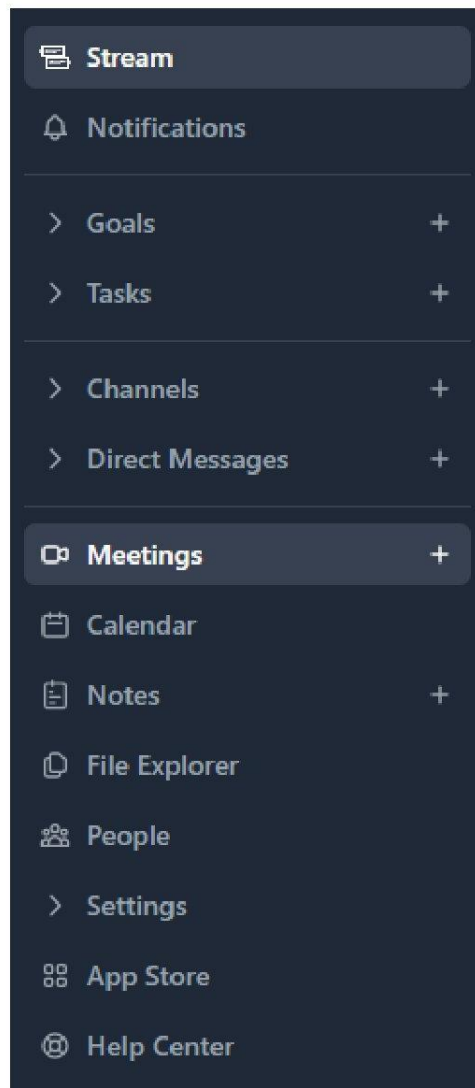
When you click +, you will see this form on your screen to schedule a meeting. Fill all the required boxes including Title, Duration, Date and Time, Goal (if you want to keep it specific between goal members), Add participants, and meeting agenda so the members could know about meeting agenda for which this meeting has scheduled. Just click the schedule and it will start showing in the list of upcoming meetings.

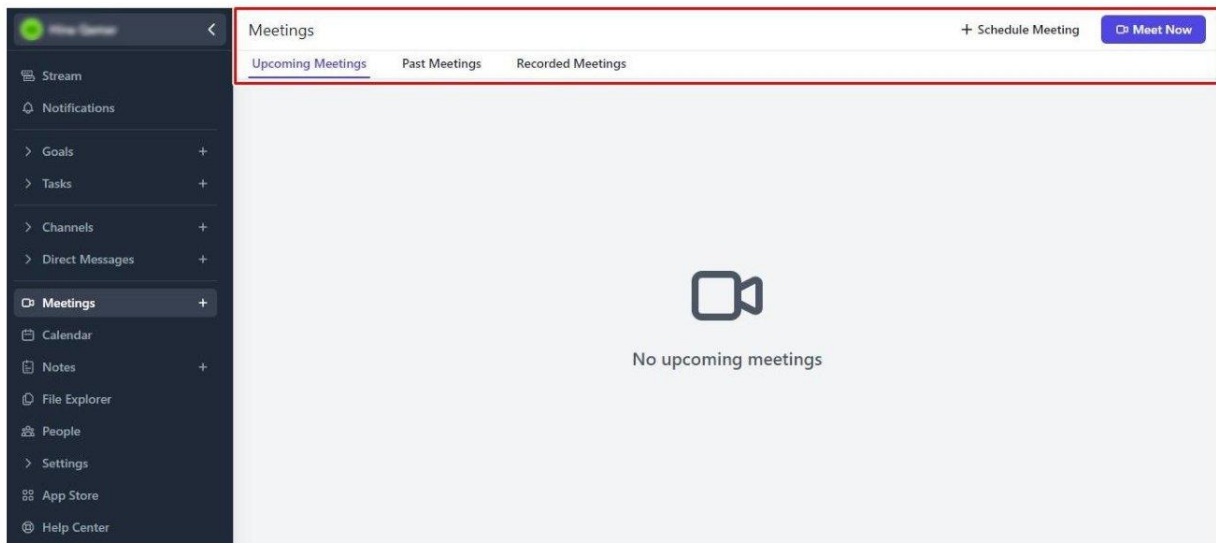You can also start an instant meeting with any member or guest you want. Just click on **Meet Now** and share the meeting link with the other person to start the meeting.

Secondly, when you Click on the Meetings in the menu bar, you will see the screen shown above. It has 3 options where you can see Upcoming meetings, Past meetings and Recorded meetings.

Upcoming Meetings: The meetings which are scheduled with you. It will show both the meetings, either you have scheduled or someone has added you to their meeting.

Past Meetings: It is for the record so you can see how much meetings you have attended and when they were scheduled,

Recorded Meetings: Every meeting has a record option, the host can record any meeting and if you were being part of the meeting, you will be able to find the recorded versions in this list.

Chapter 5

Templates

Templates can save a lot of time for your team. Any task that is either repeated or needed every day, week or month, or even for every year, just create the template, use it later and get it done. TeamingWay offers you a time-saving feature. By utilizing this feature, you can create and save tasks as a template and customize it as per your need of the time.

You can also allow specific people to have access to a particular template. It will help you keep the tasks associated with relevant team members, hence becoming more organized.
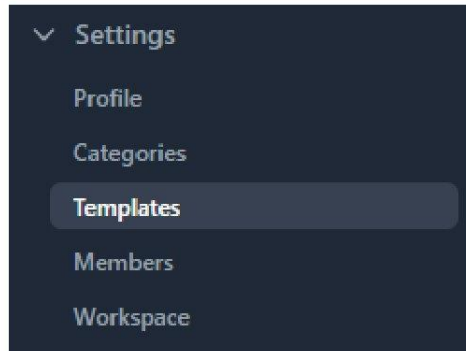
Benefits of templates

Automation has changed a lot for the project managers and other team members working on a project. You do not have to rely on the manual system at all anymore. Besides, starting everything from scratch can be burdensome. Templates can reduce the burden and help users of TeamingWay and give a smooth way to customize the templates.

- Users can better organize or collect data according to the customer's needs.
- It gives you the flexibility to manage different information masterfully.
- It gives everyone a proper structure and format to begin with.
- It lowers the risk of forgetfulness about the project requirements.

How to create a template

If you want to create a new template, you can simply navigate to the **Settings** from the left menu in the dashboard of TeamingWay. Click on settings and you will see the **Templates** option there.
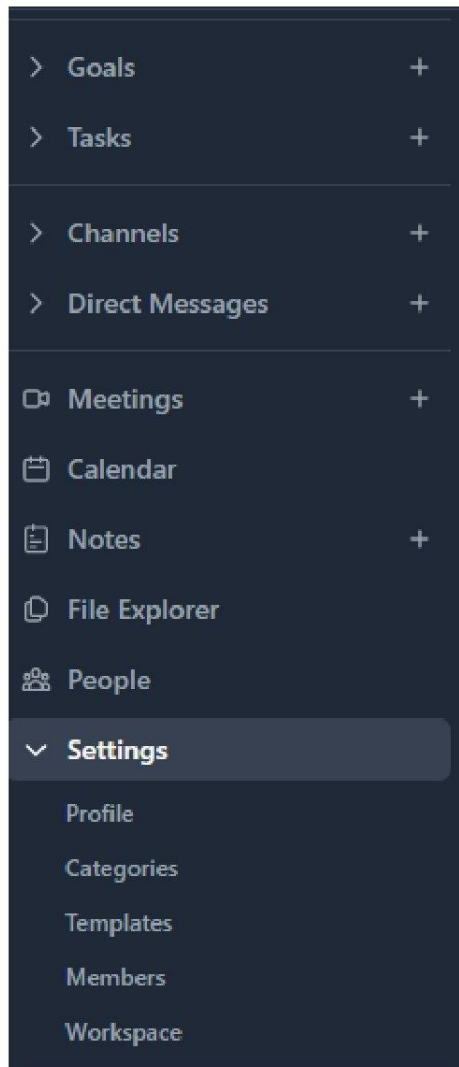
Once you click on templates, you go to the screen shown below.

You can see the 3 options to add your new template to it.

- **Custom Fields:** It allows you to add fields as per the need of your project.
- **Tasks:** Task templates are meant for specific tasks.
- **Workflow:** Set the details along with the status using a workflow template.

Creating a Template in Custom Fields

Now, if you are generating a template in custom fields, this screen will show:

You need to add the Name and Descriptions, and you can also add custom fields from the drop-down menu.

If you want to add more fields, you can click on Add and get the 6 more options for it.

- Short Text
- Long Text
- Dropdown
- Date Time
- Number
- Checkbox

By clicking on the field of your choice, you will have 3 more boxes to fill such as Name, Description, and Default value as you can see below on the screen.
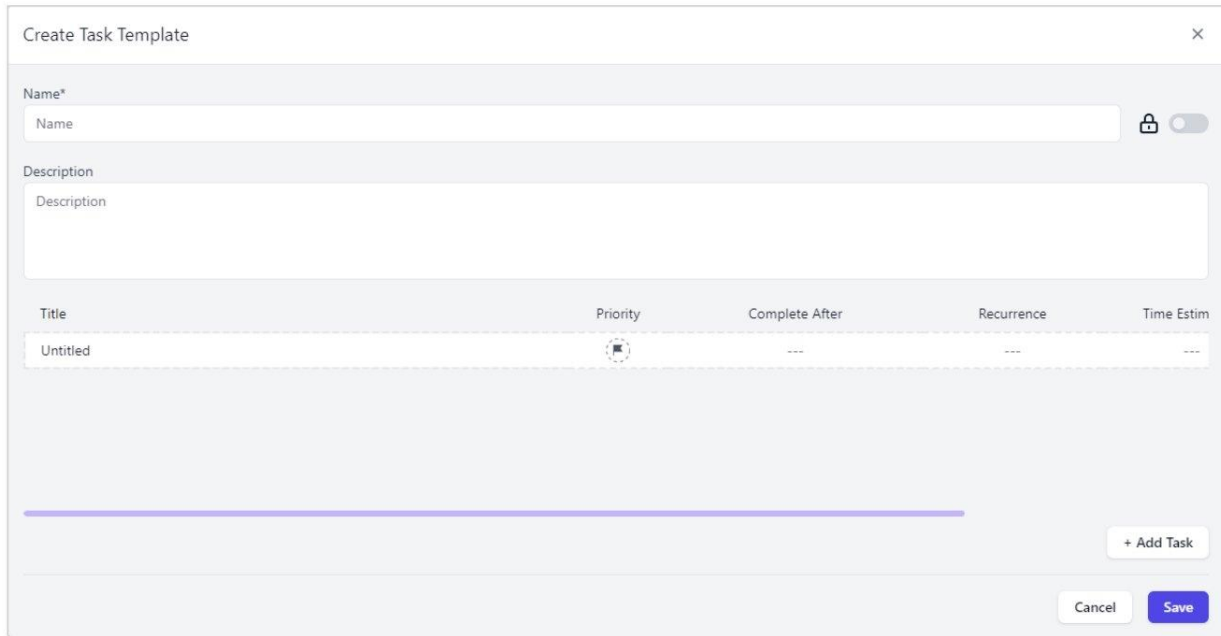
This will help you keep your project organized and have all the information stored properly.

Creating a Task Template

Now, if you choose a task template and click add a template.
Below is the window you will see.
Add all the required information and click Save.

Create Task Template				✕
Name*				🔒 ⬤
Name				
Description				
Description				
Title	Priority	Complete After	Recurrence	Time Estim
Untitled	⬤	---	---	---

+ Add Task

Cancel   **Save**

Creating Workflow Template

By clicking on the workflow, you will see the window below. It requires specific information. As it is about the workflow, it definitely requires more than just a Name and Description.

So, to make it convenient for you, we have added the Status feature too. You can set the status anytime as you customize the template according to the project.

Once you have added all the information needed, click Save until you need it next time.
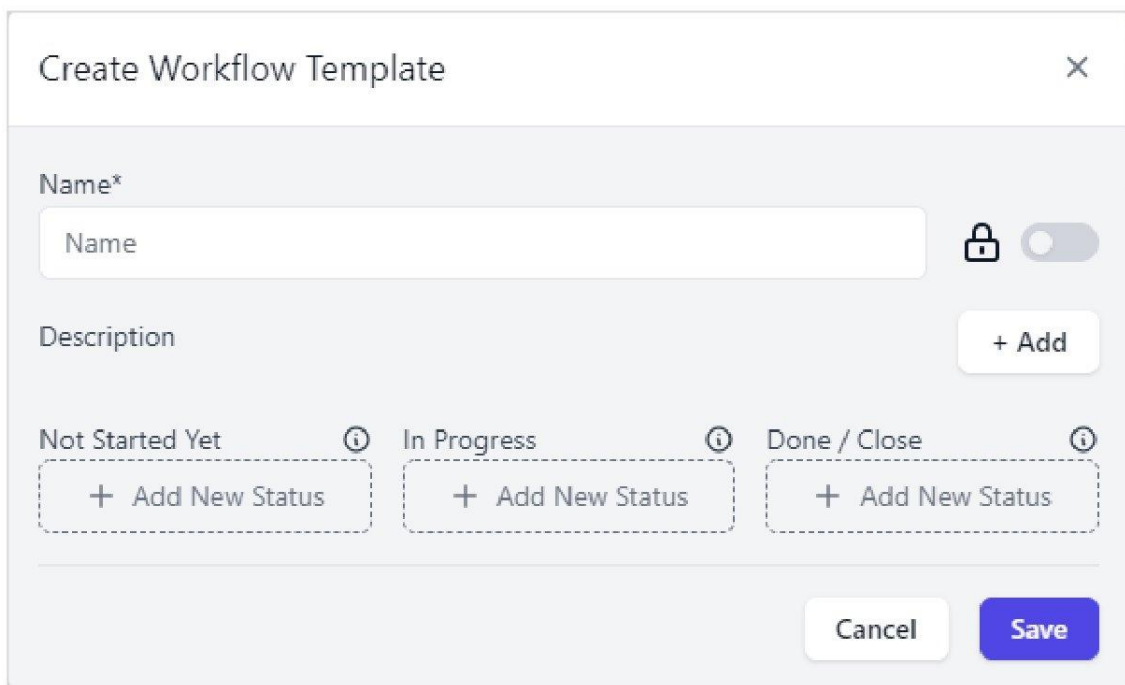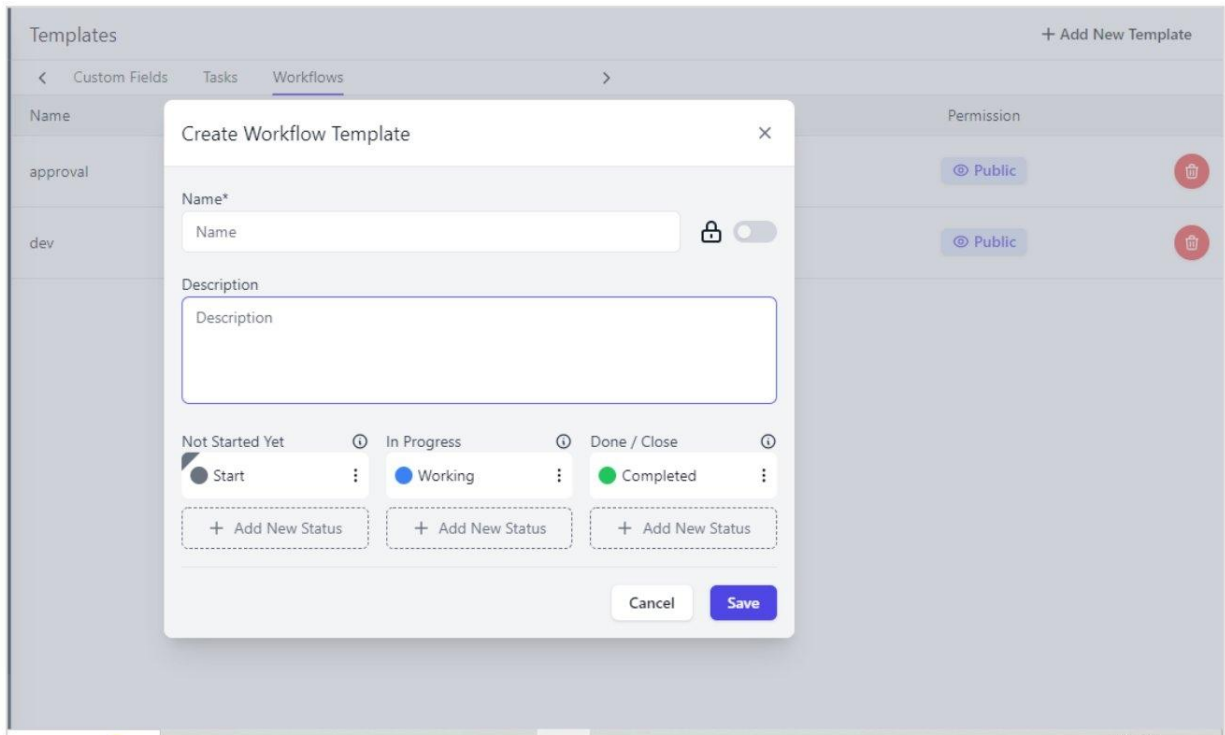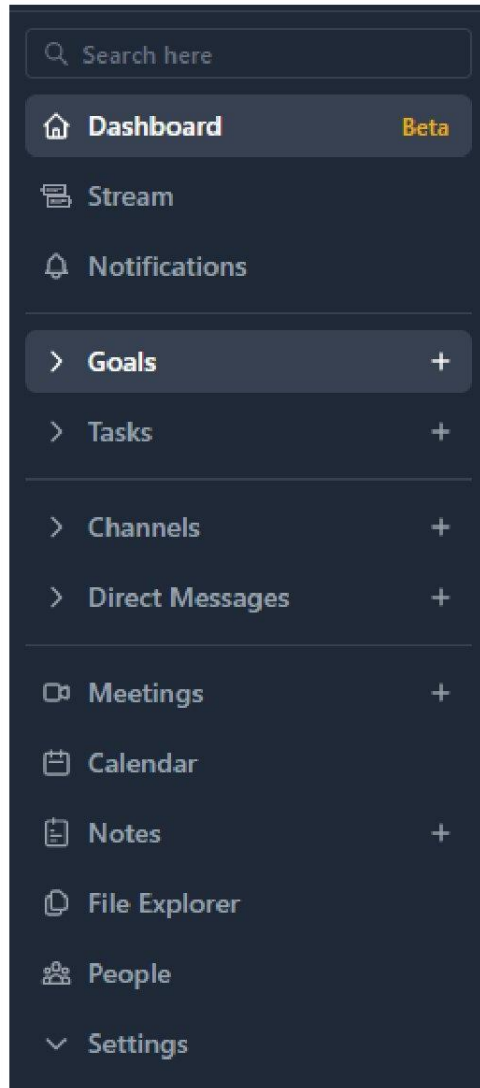
And you will see your template in the list. Now, the template is ready to use for any task, or goal you have for your projects.

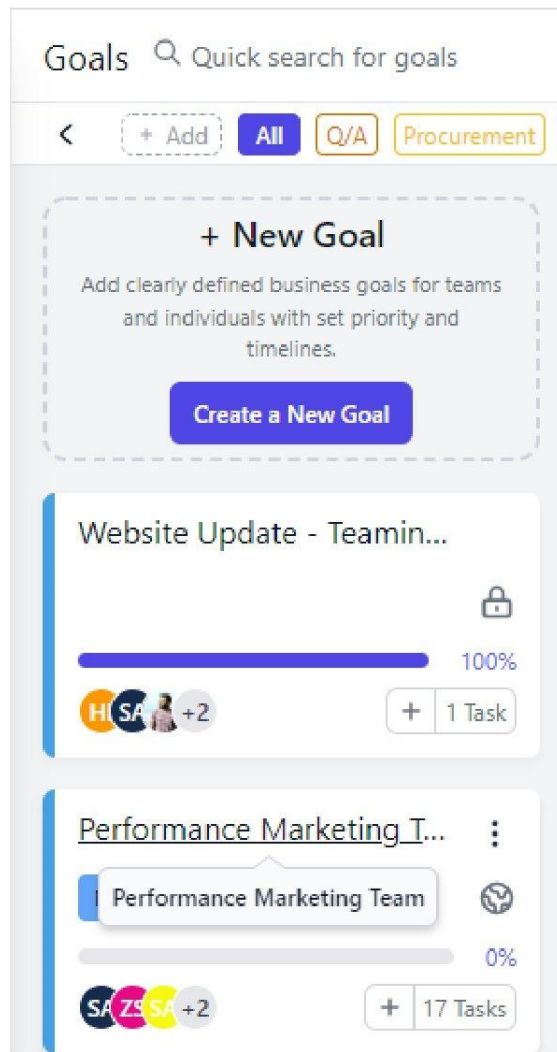**Note:** All templates have 2 options, you can set them to public and private both.


How to create tasks using a task template

Reach out for the menu in the TeamingWay and you will see the Goals. Click on it to go to the goals you already have lined up.

Here, on the screen below you can see all your goals. Choose any goal you want to add to the template.

Once you open the goal, click on Add task in the right corner of the screen and the drop-down will show you the option to "Add from template". Click on it and you will be redirected to the screen for choosing the template from the list of templates.
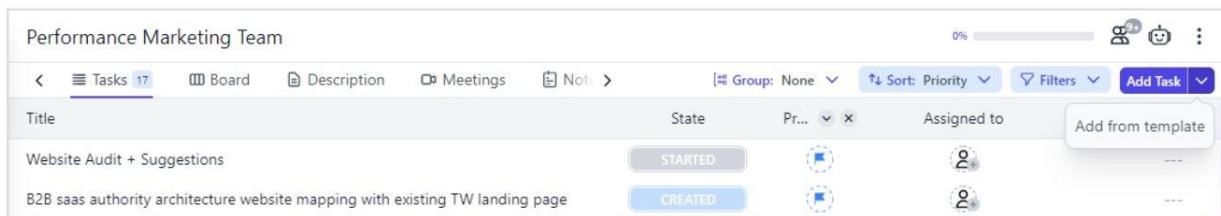
Here is the list of templates, choose the one you need and click Create.
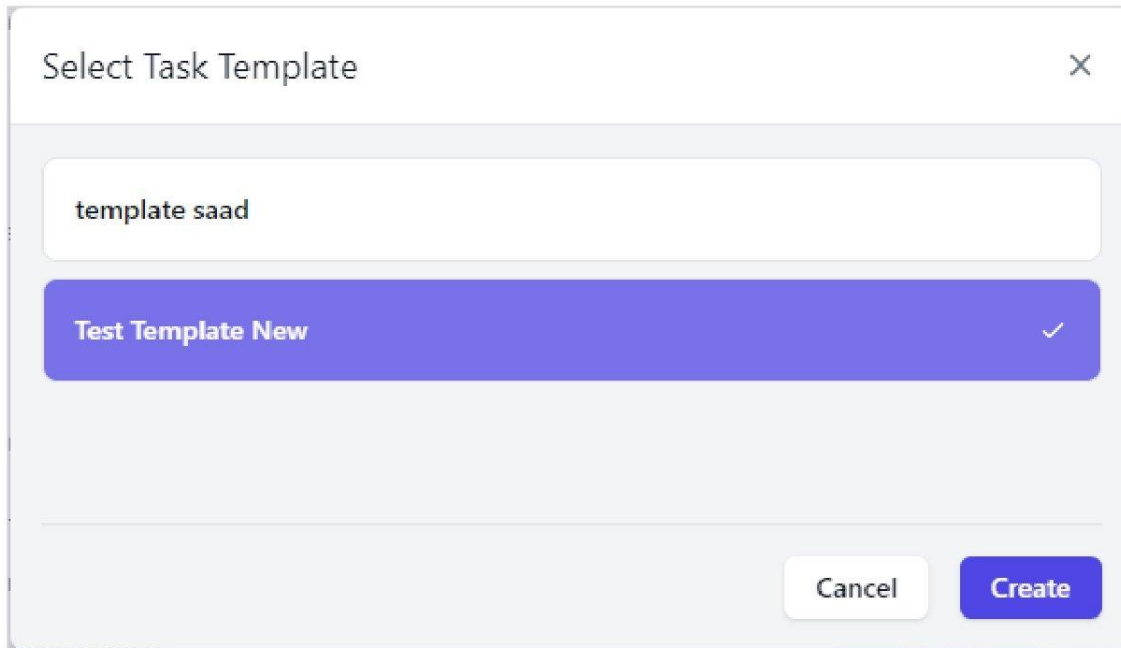
You have now successfully added the template and it is ready to use as you need it for your project.