

JAIRUS

**PROJECT  
MANAGEMENT  
PROCESSES**

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TEAMWORK PRACTICE SESSION



# PRACTICE EXERCISE I

*Organizing & Accessing Your Task List,  
and Navigating to Related Projects*

## STEP 1: LOG-IN

To access Teamwork; please bookmark this URL to log-in:

<https://jairusmarketing.teamwork.com/>

teamwork.com



### Jairus Marketing

Email address  
emily@jairusmarketing.com

Password  
..... 

Remember me [Forgot password?](#)

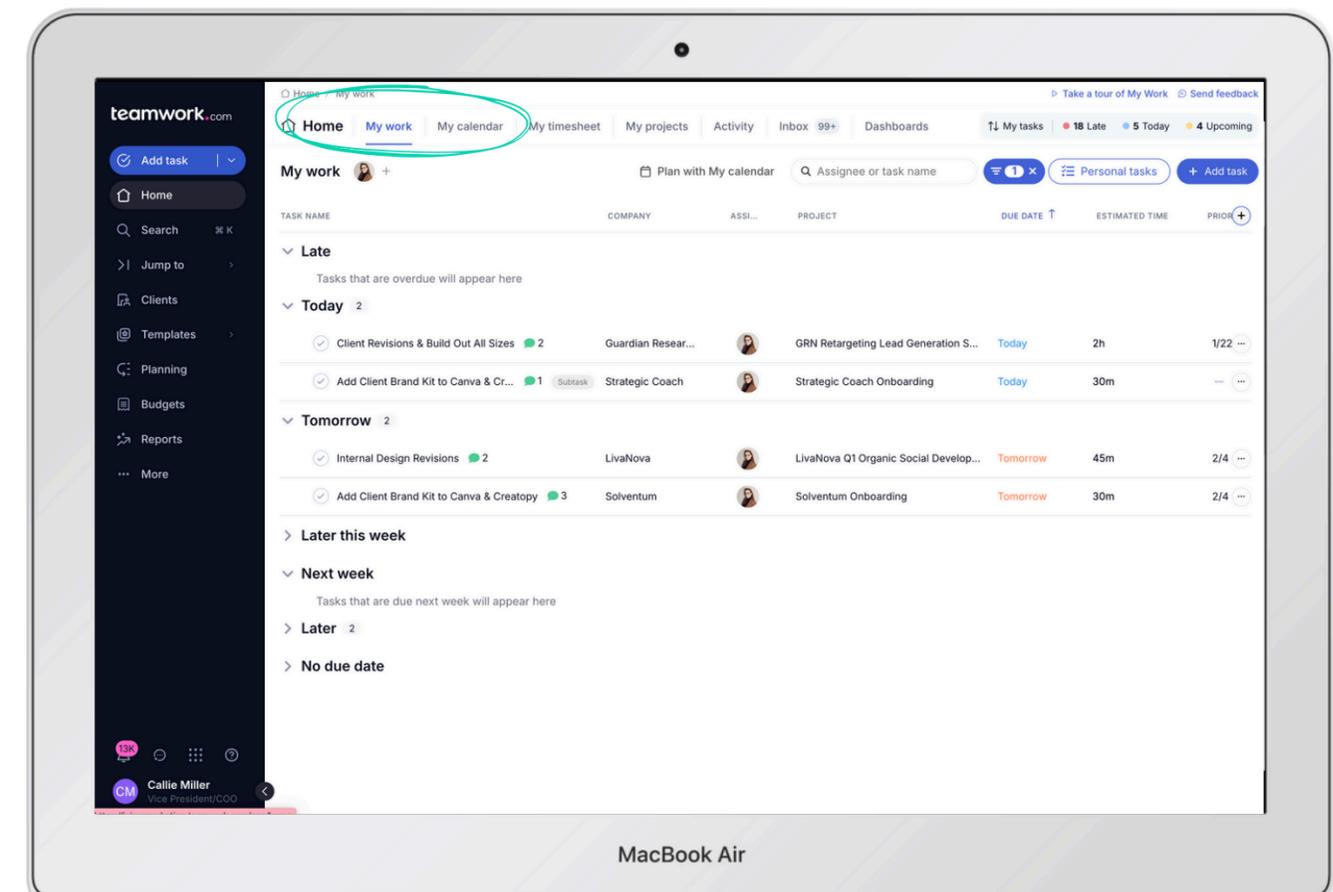
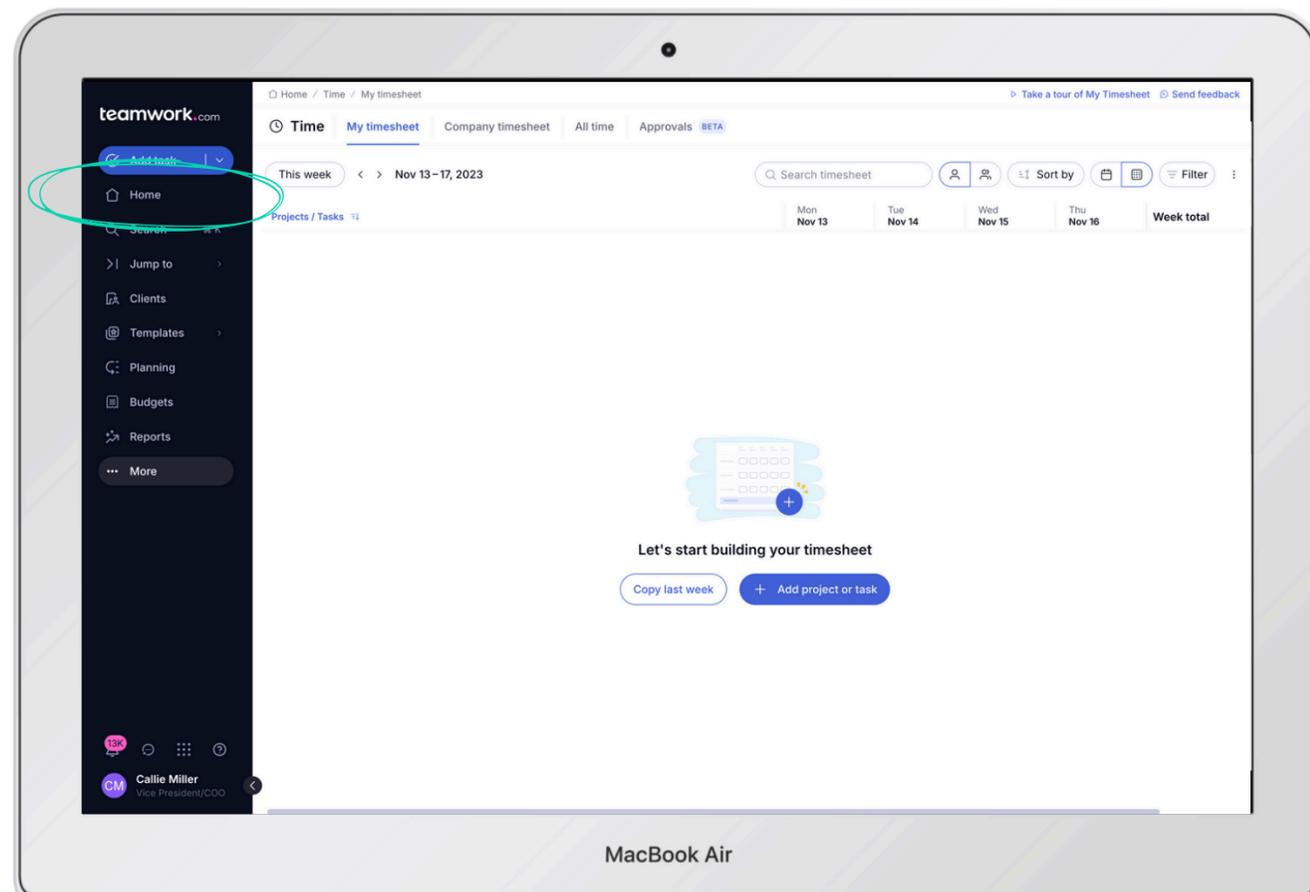
[Log in](#)

 [Log in with Google](#)

# STEP 2: NAVIGATE TO YOUR TASK LIST

In the left-side menu, click the Home button.

One on the Home tab, navigate to the My Work tab in the top menu bar.



The screenshot shows the Teamwork.com interface on a MacBook Air. The 'My work' tab is active, displaying a list of tasks categorized by due date: Late, Today (2 tasks), Tomorrow (2 tasks), Later this week, Next week, Later (2 tasks), and No due date. A filters overlay is open, showing options for Tags, Due date, Priority, Projects, Created By, Custom Fields, and Exclude tags. The checkbox for 'Only show tasks that are not blocked' is checked. A red arrow points to the filter icon in the top right of the task list.

TASK NAME	COMPANY	ASSI...	PROJECT	DUE DATE	ESTIMATED TIME	PRIOR
Late						
Tasks that are overdue will appear here						
Today 2						
Client Revisions & Build Out All Sizes	Guardian Resear...	[Avatar]	GRN Retargeting Lead Generation S...	Today	2h	1/22
Add Client Brand Kit to Canva & Cr...	Strategic Coach	[Avatar]	Strategic Coach Onboarding	Today	30m	-
Tomorrow 2						
Internal Design Revisions	LivaNova	[Avatar]	LivaNova Q1 Organ...			
Add Client Brand Kit to Canva & Creatopy	Solventum	[Avatar]	Solventum Onboard...			
Later this week						
Next week						
Tasks that are due next week will appear here						
Later 2						
No due date						

The My Work tab represents a list of all tasks in Teamwork that are assigned to you.

Make sure you have the filter for "Only show tasks that are not blocked" checked to ensure only tasks that are ready for you show up on your list.

# STEP 3: CONFIRM LIST ORGANIZATION

TASK NAME	TASK LIST	PROJECT	COMPANY	DUE DATE ↑	ESTIMATED TIME	PRIORITY ORDER	BOARD
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Next, confirm that the columns at the top of your My Work tab are organized in the following order. If not, please re-review our [Teamwork Task Organization Playbook](#) to adjust your list - this is a crucial part of managing your tasks in Teamwork.

Make sure your list is sorted by Due Date (Click the Due Date column name to ensure it turns blue with an up arrow).

- Task Name
- Task List
- Project Name
- Client Name
- Due Date
- Estimated Time
- Priority Order
- Board Status

## STEP 4: REVIEWING TASKS & RELATED PROJECTS

On your task list, scroll down and find the task called Test Task 1, tied to a task list called Onboarding Practice Task List: Moving Projects Forward and a project called Teamwork Practice Tasks.

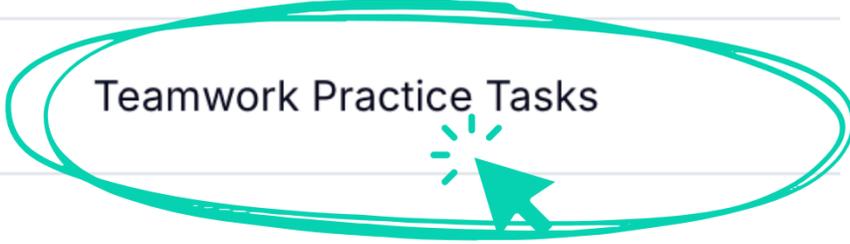
Click on the project name (Teamwork Practice Tasks) to open the project.

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Test Task 1: Valerie      Onboarding Practice Task List: Valerie

Teamwork Practice Tasks

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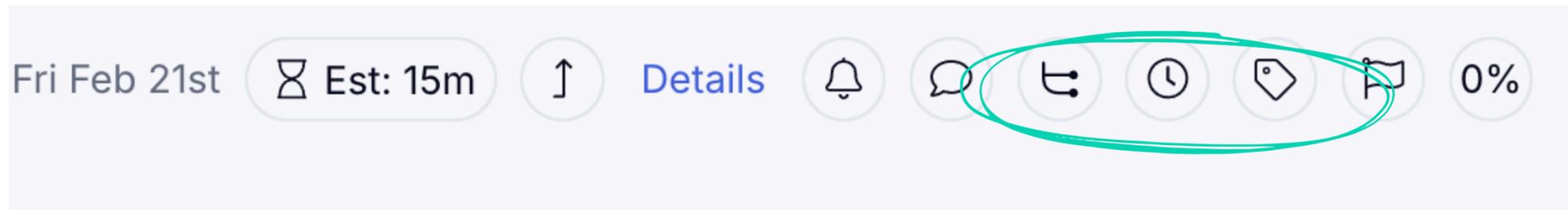
# STEP 4: REVIEWING TASKS & RELATED PROJECTS

Once you've opened up the project, find your active task within the correct task list (active tasks have a gray checkmark icon next to them).

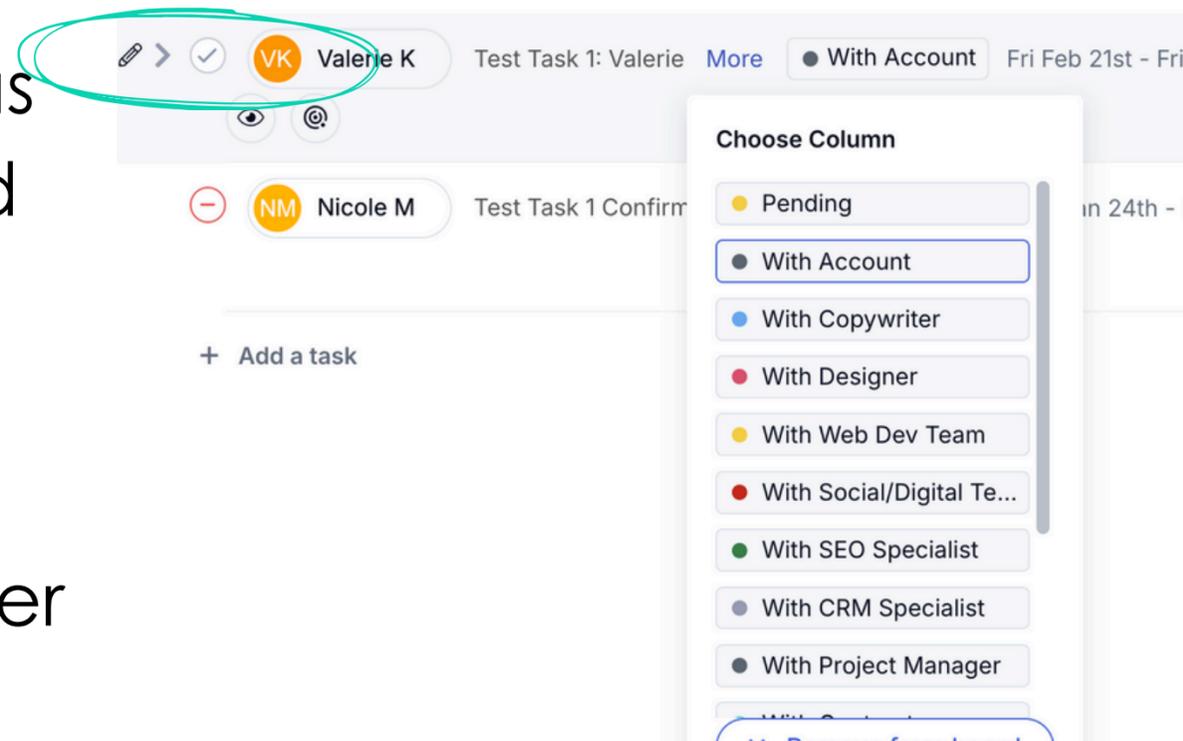
The screenshot displays a task management interface. At the top, a breadcrumb trail reads: Home / Projects / Miscellaneous / Teamwork Practice Tasks / List. Below this, a header bar for 'Teamwork Practice Tasks' includes a star icon, a 'List' tab (underlined), and other tabs: Files, Time, Dashboard, and More... An 'Automate' button is also present. On the left, a 'Task Lists' sidebar shows 'All Lists' (2 items) and 'Onboarding Practice Task ...' (2 items). The main area is titled 'Tasks' and features a 'New List View' toggle, a search bar for 'Assignee or task name', and an '+ Add task list' button. The task list is titled 'Onboarding Practice Task List: Valerie' and includes a note: 'You can customize this list for projects that don't fit into an existing template'. Two tasks are listed: 1. 'Test Task 1: Valerie' assigned to Valerie K (VK), marked as active with a checkmark, 'With Account', and scheduled for 'Fri Feb 21st - Fri Feb 21st' with an 'Est: 15m' duration. 2. 'Test Task 1 Confirmation: Valerie' assigned to Nicole M (NM), marked as 'Pending', and scheduled for 'Fri Jan 24th - Fri Jan 24th' with an 'Est: 5m' duration.

# STEP 5: COMPLETING YOUR TASK

Once you've located your task, click the small clock icon and log your time (15 minutes).



Next click the board status (current set as With Account), scroll down and selected Completed. This will automatically complete your task - be sure to confirm that the gray "active task" check mark changes to a green checkmark icon after you've changed the status.



# STEP 6: MOVING THE PROJECT FORWARD

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  Nicole M Test Task 1 Confirmation: Valerie  Pending Fri Jan 24th - **Fri Jan 24th**  Est: 5m

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Once you've logged your time and closed your own task, it's time to move the project to the next person in line. After completing your own task the next task in line (below yours) should have become active with the task icon changing from a red minus sign to a gray checkmark. To finish passing the project along, you also need to:

- Update the task board status from pending to "With" the Appropriate person - in this case "With Project Manager".

# STEP 6: MOVING THE PROJECT FORWARD

- To ensure the assignee knows the task is ready and has everything they need, you'll make a comment on their task letting them know it's ready for them. Clicking on the task name (Test Task 1 Confirmation) will open the task details box.
- At the bottom of the details box is a section for Comments. This is where you'll send the Project Manager a not letting him/her know you've completed your task.
- Once you've made your comment, you're done! You've successfully moved a task from your task list forward!

Assigned to: Nicole Ma...  
Dates: Feb 21 - Feb 21  
Priority: No priority  
Tags: No tags  
Followers: No followers  
Reminders: No reminders

See more

Details Dependencies 1 Activity

Subtasks  
+ Add a subtask

Time logs  
+ Log time on task

Files  
Drag and drop your files here. [Browse files](#)

Comments

**No comments**  
Mention someone or post an update below to get the conversation started

CM Add a comment

**Have trouble accessing your task list or moving the project forward? These resources can help!**

**Client Projects**

**Watch Now**

**Organizing Your Task List**

**Watch Now**

**Your Task List**

**Watch Now**

**Logging Time**

**Watch Now**