Create a New Activity in Project Management - ProjeQtor

Creating an Activity in the Project Management also known as ProjeQtor is done when ...

1. You need to do work in a related department or field.
2. You need to schedule work/task for another person.

An Activity is a task or work that is required to be done by a staff member, supervisor, event manager, support staff or the development team. Activities contain specific statuses, levels of responsibilities and provided Progress Dates, Work Hours, Assignment, Photos and Notes that relate to a Work or Task that is required to be done.

ProjeQtor or the Iconic Project Management Software is a project management program that manages each project, their related activities and support tickets.

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HOW TO CREATE A NEW ACTIVITY IN PROJECT MANAGEMENT aka (ProjeQtor):

1. Log into your account in ProjeQtor by going to https://iconic.productions/projeqtor/view/main.php

to access the Activities.

to create a new Activity.

4. Add a description of the work required in this Activity. It is recommended that this field be as detailed as possible for easy reading and easier to search and find it.

5. Select the Activity Type for the Activity.

   Here is an explanation of each Activity Type that can be used.
   - **CRITICAL ERROR!!! To be complete ASAP No Hours Allocated** = use this when the work/task is an **ERROR/PROBLEM** so important that it has to be actioned within 1 hour of adding into the system.

   - **CRITICAL ERROR!!!** = use this when the work/task is a critical **ERROR/PROBLEM** and needs to be actioned within 3 hours of being entered.

   - **CRITICAL Change/Upgrade** = use this when the work/task requires a **CRITICAL CHANGE/UPGRADE** of its current setup and needs to be actioned within 3 hours of being entered.

   - **CRITICAL New** = use this when the work/task is a **NEW** work/task, not done before and requires to be actioned within 3 hours of being entered.

2. Press the Activities Button

   - **URGENT ERROR!** = use this when the work/task is and **ERROR/PROBLEM** and

3. Press

needs **URGENT**, but **NOT CRITICAL** attention and can be actioned within 3-8 hours of being entered.

- **Urgent Change / Upgrade** = use this when the work/task requires an important **CHANGE/UPGRADE** of its current setup and needs to be actioned within 3-8 hours of being entered.

- **Urgent New** = use this when the work/task is a **NEW** work/task and is not **Crtical** but important and can be actioned within 3-8 hours of being entered.

- **Error** = use this when the work/task refers to an **ERROR** that needs to be done, but can be actioned within 1 - 14 days.

- **Change / Upgrade** = use this when the work/task refers to a **CHANGE/UPGRADE**, but can be actioned within 1-14 days from being entered.

- **New** = use this when the work/task is a **NEW** activity, not ever done or noted before and can be actioned within 1-14 days from being entered.

- **To-Do** = use this for any work/task that needs to be done, but has no limit of time required.

- **Developer Error - No Hours Paid or Allocated** = this **can only be used by Senior Executive Management** and refers to a development or software or computer issue that has occurred because of an error from the programming / developing team.

6. Select the Project the Activity work/task is meant to be associated with.

   Important: The list of projects displayed is based on the permissions and allocations that your user account has been assigned to.Â If you are required to work or have access to a Project that is not listed on your user account, contact support.Â Read the FAQ (I need support who do I speak to? **)** on how to ask support for assistance.

7. Enter a reference for quick search or an Event number in the **External Reference** field.Â This is optional.

8. Enter the name of the person who has requested this work to be completed.Â This can be your supervisor or manager who asked you to do the work, or another staff member who has asked for the work to be done.
   1. If the name of person is not displayed in the dropfield, press the **search button** and search for the name of the person in the **Name** field

   2. When you have found the name in the results, click once on the name to select it.

3. Press the **check tick**

   to confirm the name.

4. It will return you to the **Main Activity Window.**

9. Enter in detail the work/task description of what is required to be done.Â

   Use the Word Function Features to bold, change colour, highlight specific words, just like you would do in a word processor to make things look professional and easy to read.
   Important: if the Description window is too small to write the description of the work/task to expand and open the description windown in full screen.

   Â blank.

   as displayed.Â It needs to remain as recorded in the beginning to record the work/task.

12. Enter the person who is responsible for the work/task.Â

    This could be your name if you are meant to work on the activity.Â If you are scheduling this for another person, then select their name from the dropdown field.
    1. If the name of person is not displayed in the dropfield, press the **search button** and search for the name of the person in the **Name** field

    press the

    2. When you have found the name in the results, click once on the name to select it.

    3. Press the **check tick**
10. Leave**Â**
    to confirm the name.
    4. It will return you to the **Main Activity Window.**

13. Leave the **Results** field blank, until the work/task activity is completed.Â This field will only be required when the **Status** of the activity is changed to **Done.**
11. Leave

14. Move to **Assignment**.Â If you are a manager or project leader, you can assign the activity to a worker.Â To do this refer the FAQ procedure of [How to add resources (staff/contractors) and assign or allocate hours to an activity using the Assignment function]

15. Move to the **Progress Section**Â

    of the software.

    section
    1. In the first field enter the date the activity will start.Â This normally is the same date that the activity has been entered.

2. In the field below this, enter the **requested end date**.Â This is the estimated date that the work/task activity is to be completed by the persons assigned or responsible for the activity.

17. Select the planning status of the work/task activity.Â **It is recommended that the best planning status to select is REGULAR BETWEEN DATES for all activities.Â** This ensures that the assigned worker planning is scheduled specific to the validated start and end dates.Â

    Here is a list of the meanings of each planning status.

    - **as soon as possible** = use when the work/task is meant to be done asap. (only use when an activity is very urgent and your priority is between 1-10)

    - **must not start before validated date** = use this when the work/task is meant to start from a specific date.Â By selecting this you will need to enter the **start validated date**
      of when the work is meant to be started.

    - **work together** = use when the work/task can be done at the same time as other activities.Â Use this planning status when the activity is not urgent or critical.

    - **regular between dates** = THIS IS THE MOST RECOMMENDED PLANNING STATUS TO CHOOSE FOR all work. use this when the work/task can be done between specific dates. By selecting this planning status you will need to enter the start and end dates.Â

      This means that the work must be done during these specific dates.

    - **regular in full days** = use this when the work/task can be done in regular work hours as per your work hour rosters. By selecting this planning status you will need to enter the start and end dates.

      This means that the work must be done during these specific dates.

    - **regular in half days** = use this when the work/task can be done in regular half day hours as per your work hour rosters. For example, if your rostered work day is 8 hours, using this status will mean that the activity will be required to be done for 4 hours per day between the set number of days allocated. By selecting this planning status you will need to enter the start and end dates.

      This means that the work must be done during these specific dates.

    - **regular in quarter days** = use this when the work/task can be done in regular quarter (1/4) day hours as per your work hour rosters. For example, if your rostered work day is 8 hours, using this status will mean that the activity will be required to be done for 2 hours per day between the set number of days allocated. By selecting this planning status you will need to enter the start and end dates.

This means that the work must be done during these specific dates.

- **as late as possible** = use this when the work/task can be started at any time/date schedule, but must be completed by a specific date. By selecting this planning status you will need to enter the end date.

  This means that work can be started on any date, but must be completed by the validated end date.

- **fixed duration** = use this when the work/task can be started at any time/date schedule and finish at any time/date, but must be done within a specific amount of days.Â By selecting this planning status you will need to enter the number of days allowed for this activity to be done.

  This means that the work/task can be done on any date/time and finish on any date/time, but must be done within the specific number of days stated.

enter the number of estimated hours you consider will be required to complete the work/task activity.

.Â The system will take a few seconds to save the activity.Â Please wait.Â Once the activity is saved it will be given an Activity Number.Â If you are scheduling this activity for another person you will need to also tell them on Slack that an activity has been scheduled.Â To inform the person on SLACK do this ...

channel or the channel.

- **Important:**Â It is not recommended to copy and paste an activity to a person as a **Direct Message**

  The only time you should copy and paste an activity to a person as a **Direct Message** is when the Activity is secured, confidential and private.

1. Copy the Activity Number and the Name of the Activity from the Header section.

2. Go to SLACK, select the appropriate Department/Channel the person works in.Â If the person works in multiple departments/channels, select the most appropriate channel.

18. In **Validated work**

20. **Linking Activities together (**important if the activity is associated or connected or is secondary to a Parent Activity**).** If this activity is connected with another activity you can link the activities by pressing on .Â

1. ***If you cannot see the correct item to link***:

number if you know it, or search by or the type.

19. When all of the fields have been entered, press the **Save button**

3. When you see the item you wish to link to the activity, select it by clicking on it once until it is highlighted.

button to link the item.

2. ***If you cannot find the item and want to cancel the search window press the button.***

- **Important:** Do not copy and paste an activity in theÂ button.

1. Press the
2. Using the dropfield, select the element type of the linked item.Â Often the linked element will be the same as the activity type.
3. Scroll down the list of activities and items in the dropfield.Â When you have found the linked element, click on it.Â You can add multiple links by pressing and hold down theÂ **Ctrl buttonÂ** on your keyboard and clicking on each item.
4. Add a comment in the comment field (optional).
5. Press the

button to link the items.

21. If this activity has images, documents or files that need to be attached, [click here for instructions on how to add attachments](#).

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How to Add Notes to an Activity in Project Management (ProjeQtor).

When working on an Activity, notes should always be added to the activity while working on it.Â Notes can be anything related to the activity.Â You can also copy and paste notes from SLACK into the notes section of the activity.Â Some examples of where notes would be added to an activity are:

- To ask a question to another staff member (copy and paste on to Slack to).
- Things found while working to remind of.
- Delays in the activity.
- Problems being experienced and need to be noted.
- Updates of what was done to the activity while working on it.Â For example, "I added another 4 lines to the script for review by the playwriter", or "Worked on the 4 part of the coding and found that the DIV has failed on line 32 to 48, need to ask for permission rights to recode".

To add a note to a any work activity [click here for the instructions](#).

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There are other important things to be aware of when using the Project Management (ProjeQtor).Â Â

They are located in the FAQs however here is a list of items that would help you when working on the project management

- [A brief process of how Project Management System works in Projeqtor](#)
- [What to do when you are about to start work on an activity in Projeqtor?](#)
- [How to enter a note on an Activity in Projeqtor?](#)
- [What do the activity status - activity statuses mean in Projeqtor?](#)
- [How to enter Results when activity status changed to Done](#)

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