**Using Bitrix24**

This guide assumes you’ve already created an account and/or accepted an invite to the project.

**Login**

Navigate to <https://s-mart.bitrix24.com>

Enter email and password and login.

**Select S-Mart Project**

Ensure you are looking at the S-Mart project to view only tasks related to it. Do so by clicking the ‘Projects’ link in the navigation bar near the top of the site.

Search the list for the ‘S-Mart’ link and click it

A list of tasks related to the S-Mart project should now be listed.

\*\* Note: I must have your email address to invite you to the project so that I can assign you tasks

**Change views**

You can change the view of how the tasks are displayed. (I believe) By default you are shown the List View. Right above the task list and to the right side you can switch views between Planner, Kanban, Gantt.

**List** – This one is (I believe) the default view. It is just list of tasks you can sort and search through.  
  
**Planner** – I doubt we will use this one much.

**Kanban** – This one could be handy, but it seems to be a personal progress tracker. You can setup your own progress categories.

**Gantt** – This one seems useful. It displays the List View in a more graphical manner that seems easier on the eyes than searching the List View for deadlines.

If in List View, you can sort the list based on your choice such as by deadline date, assigned to, status, etc.

Add/remove columns by clicking the gear icon at the top left of the list.

Be sure to keep an eye on the “Filter and search” input field. As you begin to filter and search for specific features, you start to build up levels of a query. You can click the ‘x’ icon in each of these options/filters to increase/decrease number of tasks displayed. For instance, if you delete all filter options in the input field tasks that have been completed will be displayed for you to check previous work.

**Update Task**

1. Click the title of a task (Notice: some tasks are expandable) to open it

If you open an expandable task you will find sub tasks below. Be sure that you are editing the appropriate subtask and not the parent task when editing/completing them.

This is setup with subtasks because they all share the same completion date and are related to an overall issue.

1. If the task is assigned to you and you are ready to begin applying some sort of effort towards completing it, click the ‘Start’ button to mark the task ‘In Progress’ so the team knows what is being worked
2. You may get to a point where you need to pass the task off to a team member for additional feedback and/or data. You will click the ‘change’ link located about half way down the right-side information bar where is says “Responsible person.”
   1. Then choose the appropriate team member.
   2. Leave a detailed comment below on the task screen about why you’ve handed it off, what information you’re seeking, and what you need to be able to take back the task and complete it.
3. If you need to place a task on hold for some reason, click the ‘Pause’ button (formerly ‘Start’).

After completing a task assigned to you, click the ‘Finish’ button so that is marked completed and removed from the list of open tasks.

**Add/Edit Task**

1. Click the ‘New Task’ button or the arrow immediately next to the button located under the main navigation on the right side.
2. Type in a descriptive title where it says “Things to do” like an email’s subject line
3. If you need to provide additional information such as a large and/or detailed description of an issue, situation, or list relevant URLs, etc. post it under the section directly under the “Things to do” line in the description.
4. Under the description click the ‘+ Add More’ link to select the appropriate user(s) the task should be assigned to, removing yourself from the list if you’re creating for someone else.
5. If not part of a parent task’s completion date, click the ‘Calendar’ icon in the input field next the “Deadline” label and select a completion date where they time due would be 11:59pm.
6. Click the ‘More’ link to open more options.
7. Verify the “Project” is “S-Mart”
8. If a subtask of a parent task, click the ‘+ Add’ link in the “Subtask of” input field to open a list selection. Select the appropriate parent task(s) and click the ‘Select’ button.
9. Verify all information is filled in
10. Click the ‘Add Task’ button to add the task and return to the task view, or click ‘Add Task And Create Another One’ button to add the task and receive a blank form to add another new task.

Though this document is bound to grow as we use the tool, these instructions should be enough to get you around in the tool to be able to use it sufficiently enough to track/update your tasks and keep your team informed.