



# Clarizen Go Quick Start Guide



# Welcome

Welcome! Get to know the main building blocks in Clarizen Go

## Workspaces

Use workspaces to manage projects, products, customers, teams, etc.

## Boards

In a Workspace, use one or more Boards to create and track Tasks. Use multiple Boards to divide work into different sprints, teams, project phases, sub-projects, or any other group

## Tasks

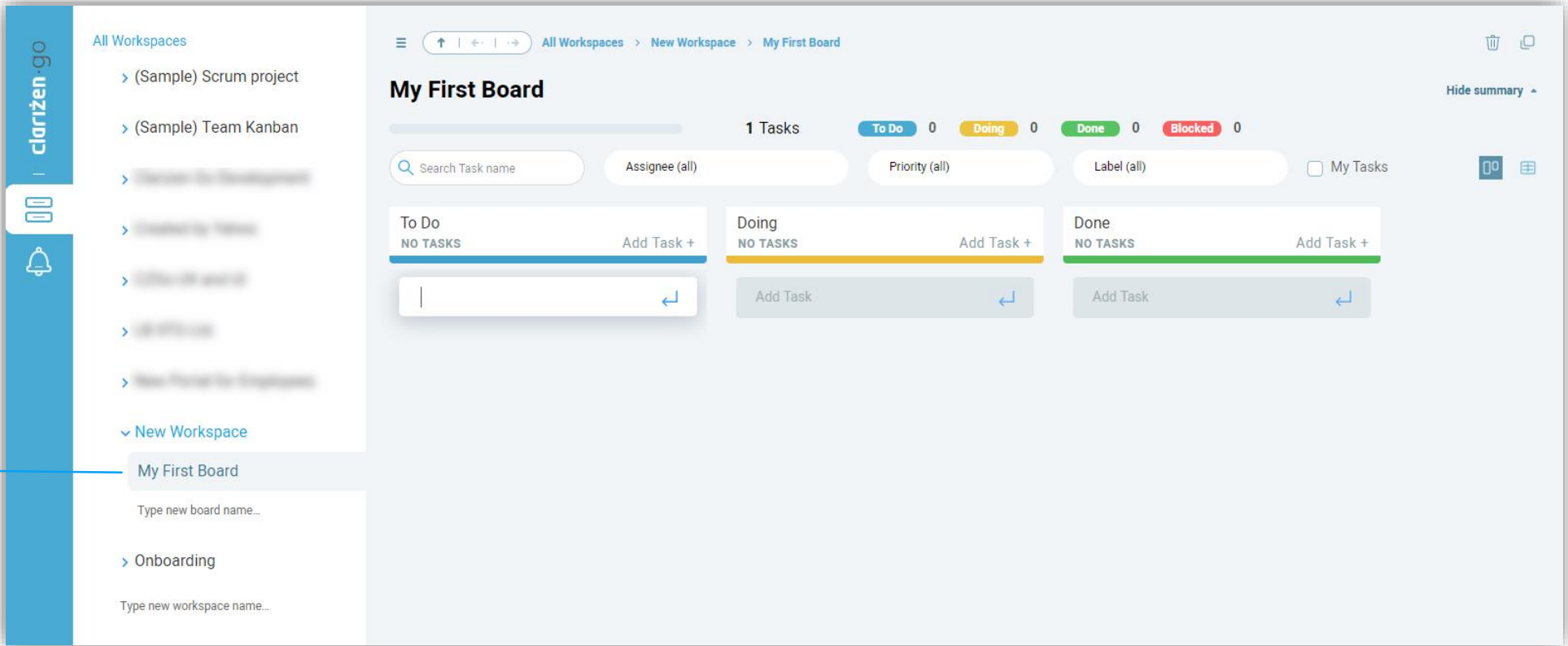
In the Board, organize tasks in Stages

The screenshot displays the Clarizen Go interface for a workspace named 'Development'. The left sidebar shows a navigation menu with 'All Workspaces' and a list of projects including 'Sample Kanban project with multiple teams', 'Sample Scrum project', 'Sample Team Kanban', 'Clarizen Go Development', 'Created by Yahoo', 'CZGo UX and UI', and 'LB STG Ltd.'. Under 'LB STG Ltd.', there are sections for 'BACKLOG', 'Design', 'Development', and 'Onboarding'. The main area shows a Kanban board with five stages: 'To Do' (3 tasks), 'Reopened' (1 task), 'In Progress' (3 tasks), 'Done' (1 task), and 'Done 2' (2 tasks). Each stage has an 'Add Task +' button. Task cards include titles, dates, priorities, and assignees. For example, 'Create draft summary' is due on May 29, has a 'High' priority, and is assigned to 'Larry Bear'. 'Submit proposal' is due on May 21, has a 'High' priority, and is assigned to 'Larry Bear'. 'Implement code' is due from June 14 to June 29, has a 'Low' priority, and is assigned to 'Larry Bear'. 'Initial review' is due on June 14, has a 'High' priority, and is assigned to 'Larry Bear'. 'Plan schedule' is due on June 14, has a 'No priority', and is assigned to 'Larry Bear'. 'New design plan' is due on June 14, has a 'No priority', and is assigned to 'Larry Bear'. The bottom left corner of the interface shows the initials 'LB'.

# Meet Clarizen Go. Welcome to Your Workspace

## Welcome

To help you get started, an example Workspace and a board have been created in your environment.



Your first Board

# Customize Stages to Suit Your Processes

## Add Stages

Organize Tasks in Stages that represent the phases in the project.  
Add Stages if you require additional phases in the project.

## Set colors

Set the Stage status (color) to reflect the status of the tasks in the Stage (To do, In progress, Done)

## Update Task progress

Drag tasks between Stages to update progress

The screenshot displays the Clarizen Go Kanban board interface. On the left, a sidebar shows navigation options for 'All Workspaces' and 'LB STG Ltd.' with a 'Development' board selected. The main area shows a Kanban board with five stages: 'To Do' (3 tasks), 'Reopened' (1 task), 'In Progress' (3 tasks), 'Done' (1 task), and 'Done 2' (2 tasks). A dropdown menu is open over the 'Reopened' stage, showing three options: 'TO DO' (blue), 'BLOCKED' (red), and 'DONE' (green). The board contains several task cards with details like titles, dates, priorities, and assignees. The interface also includes search and filter options at the top and an 'Add Task' button at the bottom of each stage.

# Create Tasks

Tasks can be basic, or include all the details

Set the priority, add to a board and assign a member

Include checklists and check off done items

Add labels for filtering and searching

Categorize tasks into logical groups, such as epics, categories or work types.

Set independent due dates or relative to a Milestone.

Add attachments

**Submit proposal**

High REOPENED Doing Assignee: [User]

Description  
Submit proposal after final approval

Checklist  
 Review copy  
 Create draft  
 Include proposal

Type to add a new item

Labels  
core Marketing

Epic  
Competitive analysis

Start Date: May 19, 2019 Estimation: 5 Days

Due Date: May 19, 2019 Use Milestone date:

Beta release 2 Days Before Milestone Due date

Workspace: LB STG Ltd. Board: Development

Stage: Reopened Doing

Attachments  
sections.png

Upload file Drag files here or paste them

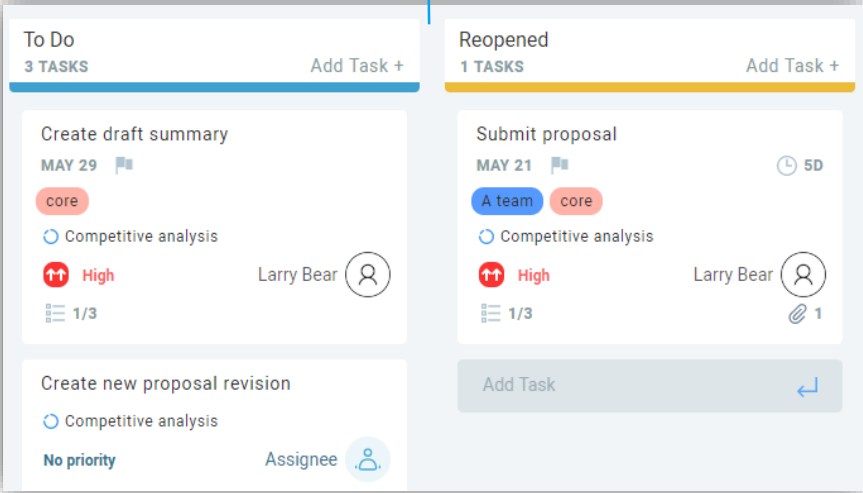
Delete task Copy link

# Different ways to view the work

Switch views and focus on what you need to do.

In all views you can filter by priority, assignees, labels or your own tasks.

**Kanban**  
Customize the board Stages to reflect different phases in your process. Drag Tasks to update progress

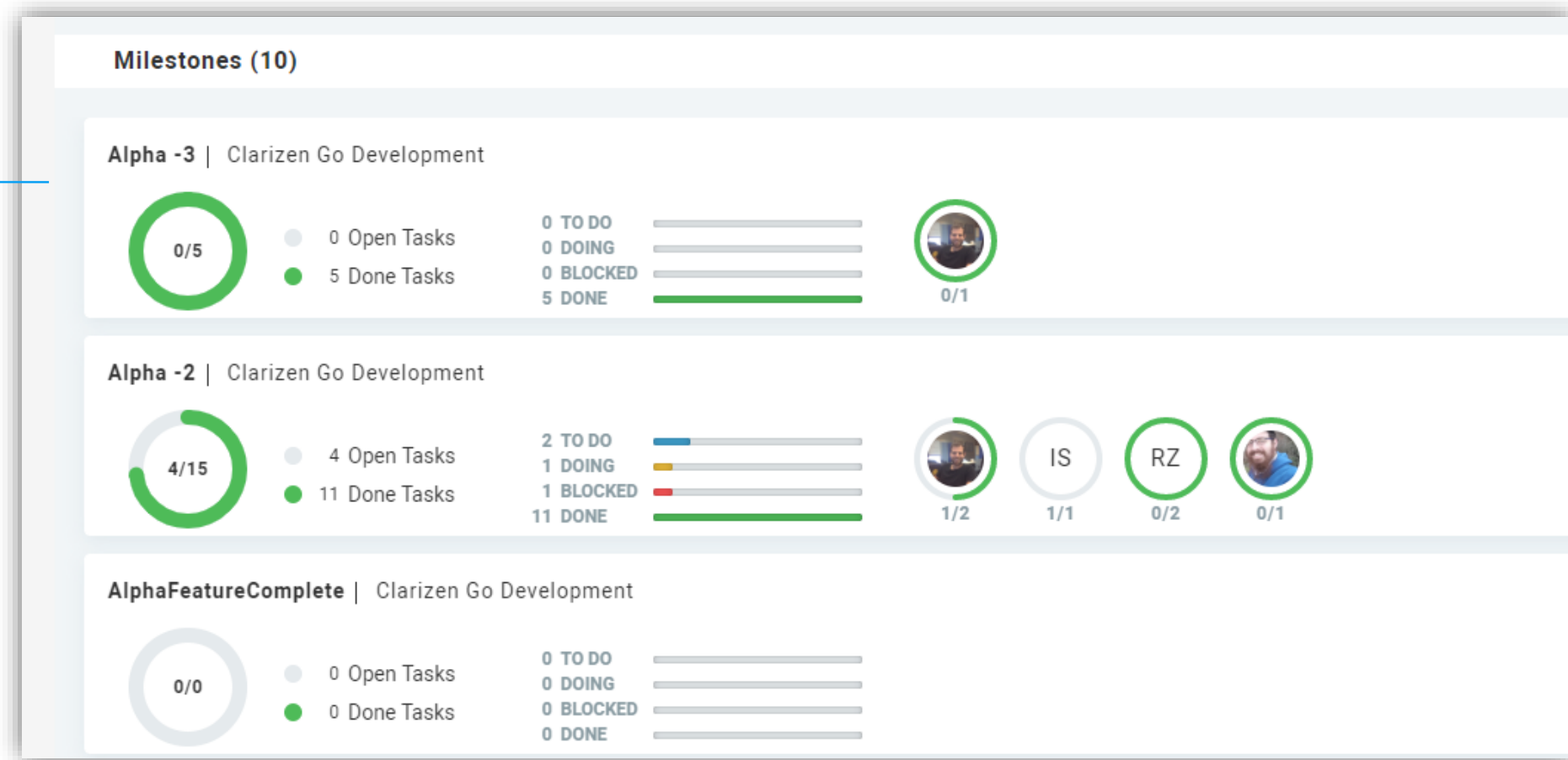


**Grid**  
View and update tasks inline

Name ↑	Status	Priority	Stage
Type to create new task			
Add new chapter	To Do	No priority	To Do
Create draft summary	To Do	High	To Do
Create new proposal revision	To Do	No priority	To Do

# Track important dates with Milestones

Track progress with Milestones



# Track important dates with Milestones (cont.)

Set due dates for Tasks relative to a Milestone

The tasks' due dates will automatically shift if the Milestone moves

Due Date

May 19, 2019  Use Milestone date

Beta release ▼ 2 ▼ Days ▼ Before Milestone Due date



# Categorize with Epics

Categorize tasks into logical groups, such as epics, deliverables, work types, customers, or anything else by which you want to group and track tasks.

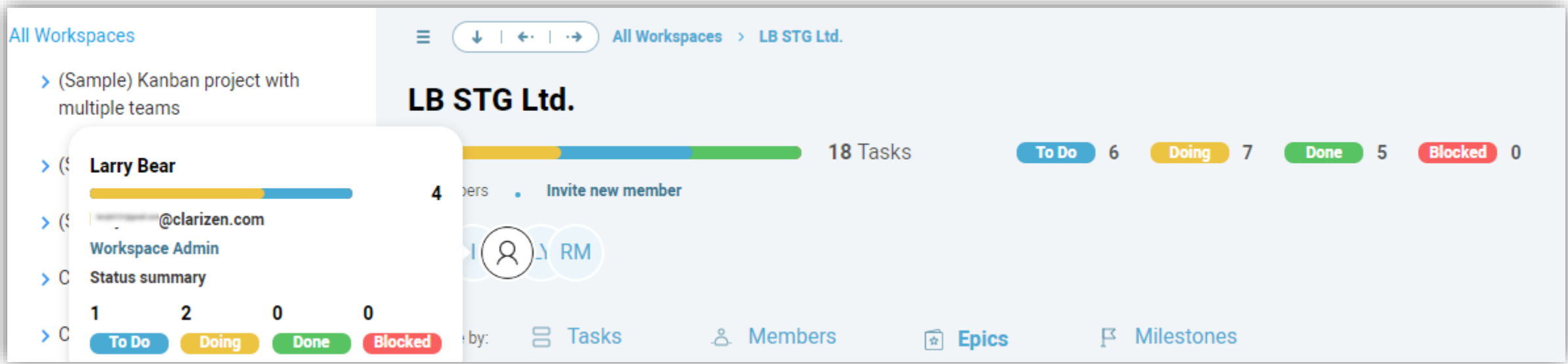
View and track tasks in the Workspace, under the Epics tab.

The screenshot displays the 'LB STG Ltd.' workspace interface. At the top, there are navigation tabs for 'Tasks', 'Members', 'Epics' (which is selected), and 'Milestones'. Below the tabs are search and filter options: 'Search Task name', 'Assignee (all)', 'Priority (all)', and 'Label (all)'. The main content area shows two epic cards:

- Competitive analysis | LB STG Ltd.**
  - Progress: 6/9 (60% complete)
  - 6 Open Tasks (grey dots)
  - 3 Done Tasks (green dots)
  - Task status bar: 2 TO DO (blue), 4 DOING (yellow), 0 BLOCKED (grey), 3 DONE (green)
  - Assignee: 3/3 (indicated by a person icon)
- Version Release | LB STG Ltd.**
  - Progress: 0/0 (0% complete)
  - 0 Open Tasks (grey dots)
  - 0 Done Tasks (green dots)
  - Task status bar: 0 TO DO (blue), 0 DOING (yellow), 0 BLOCKED (grey), 0 DONE (green)

# See an updated status in the Summary

In Workspaces and Boards you can view the current status of the tasks.  
In a Workspace, hover over a user to see the user's status.



# How will you use Clarizen Go?

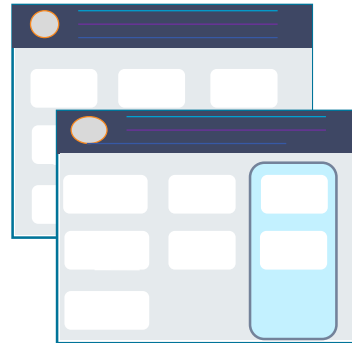
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Here are some examples

## Manage a project with multiple teams

Create a Board for each team

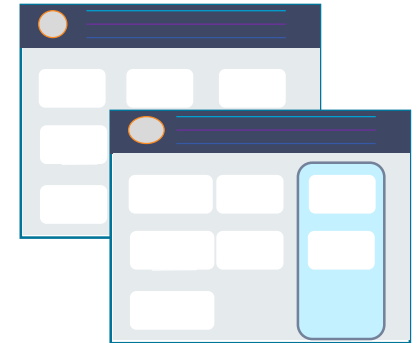
Create Stages to reflect the work process of the specific team



## Manage a Scrum Project

Create a Board for each sprint

Add a Stage for each phase in the sprint.  
Add tasks to Stages.

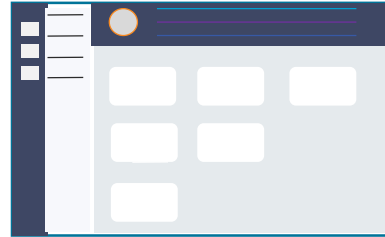


# How will you use Clarizen Go? (cont.)

Some more examples

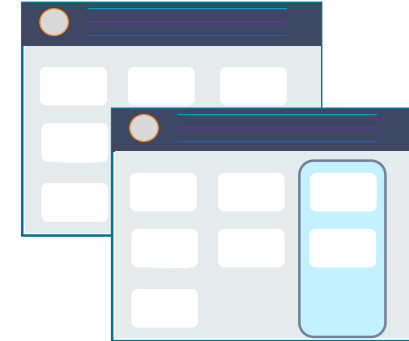
## Manage a project with multiple customers

Create a Workspace for each customer

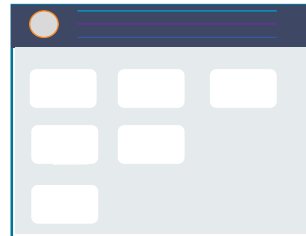


or

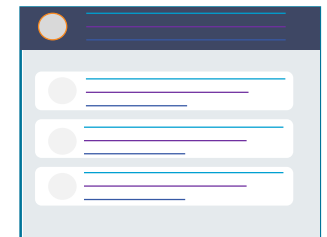
Create a Board for each customer



Create a Board for each work type or deliverable, such as Demo, RFP, etc.



For each Task, associate an Epic. Epics represent Work types or deliverables such as Demo, RFP, etc.





# THANKS

[www.clarizen.com](http://www.clarizen.com)

