

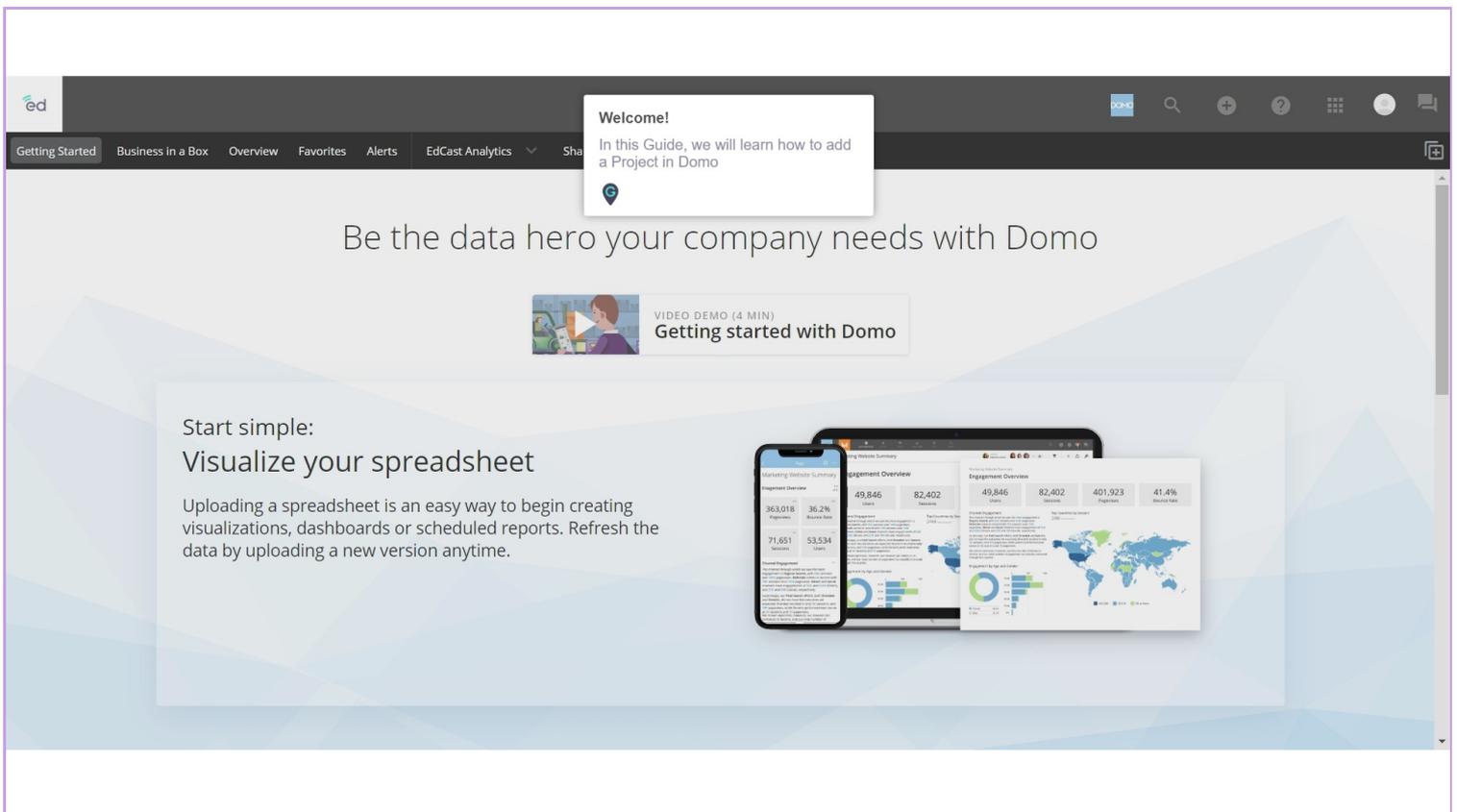


How to Add a Project in Domo

# Step: 01

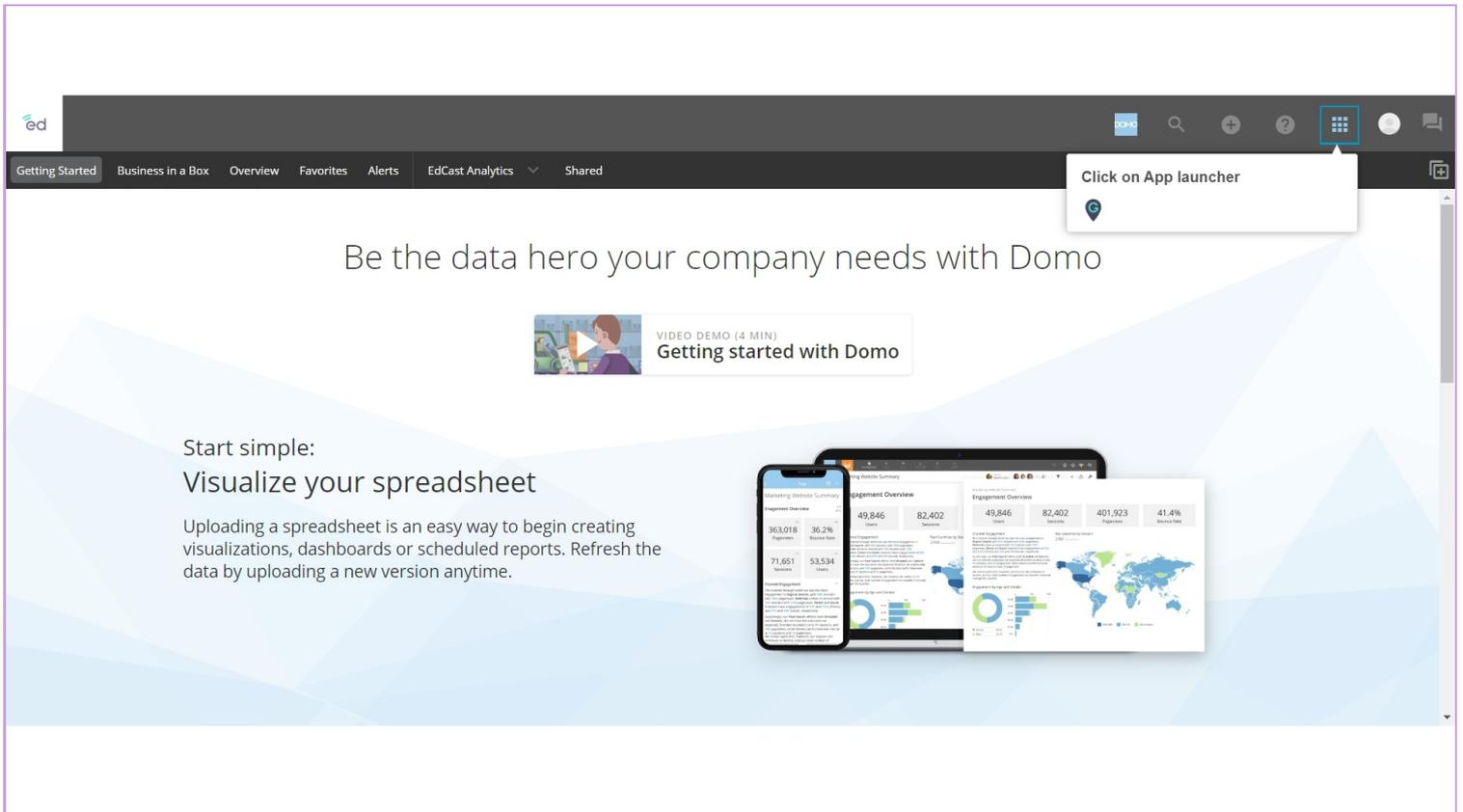
## Welcome!

In this Guide, we will learn how to add a Project in Domo



# Step: 02

## Click on App launcher



## Step: 03

### Select "Projects and Tasks"

The screenshot shows the Domo dashboard interface. At the top, there is a navigation bar with the following items: Getting Started, Business in a Box, Overview, Favorites, Alerts, EdCast Analytics, and Shared. A search bar and several utility icons are also present. A blue navigation menu is overlaid on the right side of the dashboard, containing the following items: PROJECTS AND TASKS (highlighted with a white callout box), APPSTORE, DISCOVER, FEEDBACK, HELP CENTER, and CERTIFICATION CENTER. The main content area features a large heading "Be the data hero your company needs with" and a video player titled "VIDEO DEMO (4 MIN) Getting started with Domo". Below this, there is a section titled "Start simple: Visualize your spreadsheet" with the text: "Uploading a spreadsheet is an easy way to begin creating visualizations, dashboards or scheduled reports. Refresh the data by uploading a new version anytime." The background of the dashboard is a light blue geometric pattern.

# Step: 04

## Click on "Add project"

The screenshot shows a web application interface for 'Projects and Tasks'. At the top, there is a navigation bar with the 'ed' logo on the left and several utility icons on the right. Below the navigation bar is a sub-menu with items like 'Getting Started', 'Business in a Box', 'Overview', 'Favorites', 'Alerts', 'EdCast Analytics', and 'Shared'. The main content area is titled 'Projects and Tasks' with the tagline 'Unleash the power of your organization'. A search bar labeled 'Filter projects' is positioned to the right of the title. The interface is divided into three sections: 'Your tasks', 'Your projects', and 'All company projects'. The 'Your tasks' section includes 'Your personal tasks' (1 Open, 0 Closed) and 'Tasks that you have assigned' (0 Open, 0 Closed). The 'Your projects' section shows 'No available projects' and an 'ADD PROJECT' button. The 'All company projects' section lists 'CEO Dashboard' (0 Open, 0 Closed) and 'PMO' (0 Open, 0 Closed). A callout box with a location pin icon points to the 'ADD PROJECT' button, with the text 'Click on "Add project"'. The 'ADD PROJECT' button is highlighted with a blue border.

## Step: 05

Enter "Project name"

The screenshot displays a web application interface with a modal dialog box titled "Create new project". The dialog box contains the following fields and options:

- Project name:** A text input field with a callout box pointing to it containing the text "Enter 'Project name'".
- Team members:** A search input field labeled "Search users".
- Privacy:** Two radio button options: "Public" (selected) with the subtext "visible to all people", and "Private" with the subtext "only visible to team members".
- Project description:** A large text area for entering details.
- Due date:** A date selection field.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom of the dialog.

The background interface shows a navigation bar with "ed" and "DDMS" logos, and a main section titled "Projects and Tasks" with a search filter. Below this are sections for "Your tasks", "Your projects", and "All company projects".

## Step: 06

Search users to add them as your team members for this project

The screenshot displays a web interface for project management. A modal dialog titled "Create new project" is open in the center. The dialog contains the following elements:

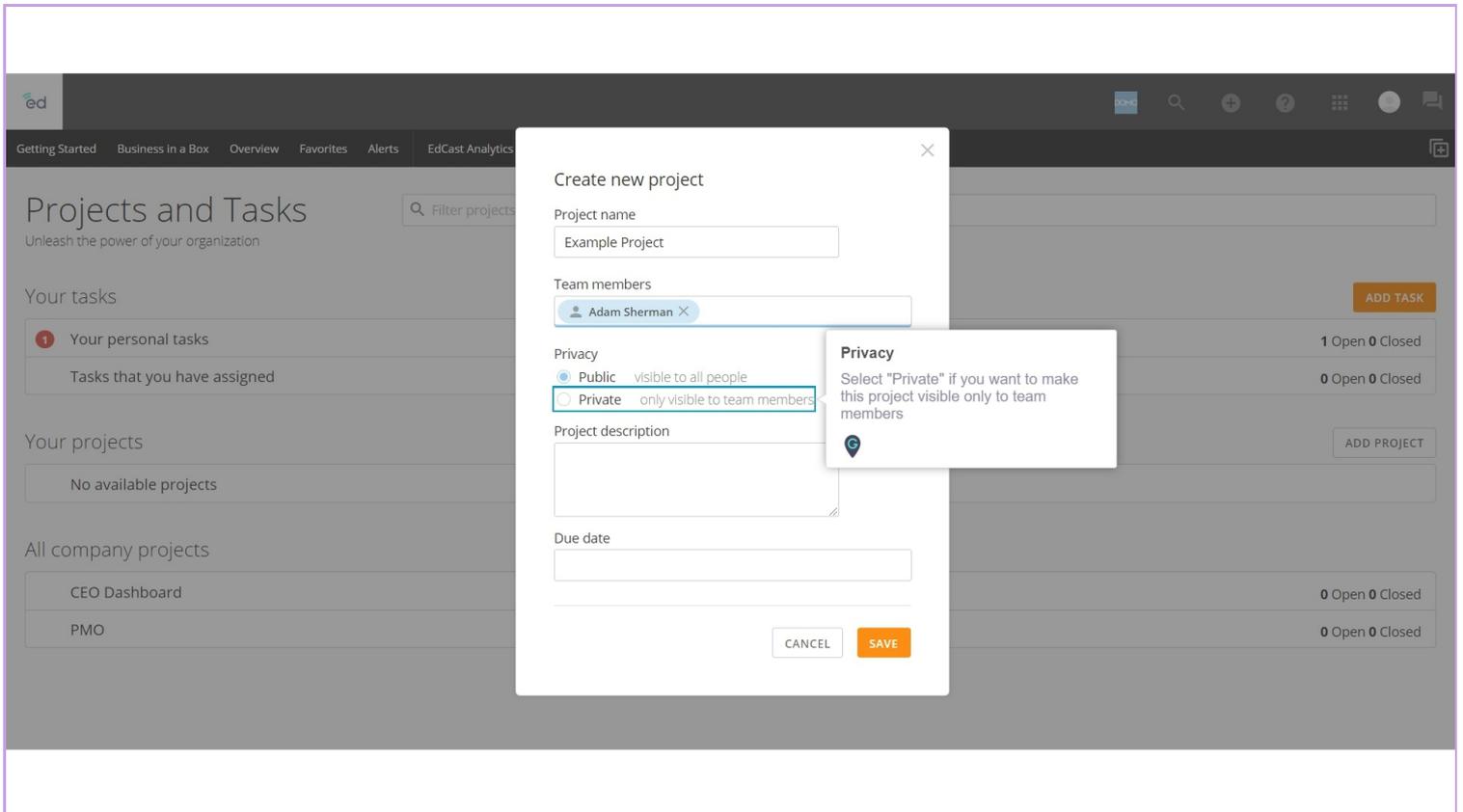
- Project name:** A text input field containing "Example Project".
- Team members:** A section with a blue header "Team members" and a "Search users" input field below it. A callout box points to this section with the text: "Search users to add them as your team members for this project".
- Privacy:** Two radio button options: "Public" (selected) with the subtext "visible to all people", and "Private" with the subtext "only visible to team members".
- Project description:** A large text area for entering details.
- Due date:** A date selection input field.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom right of the dialog.

The background interface shows a navigation bar with "ed" and "DDMS" logos, and a sidebar with "Projects and Tasks" and "Your tasks" sections. The main content area lists various project entries with status indicators like "1 Open 0 Closed".

# Step: 07

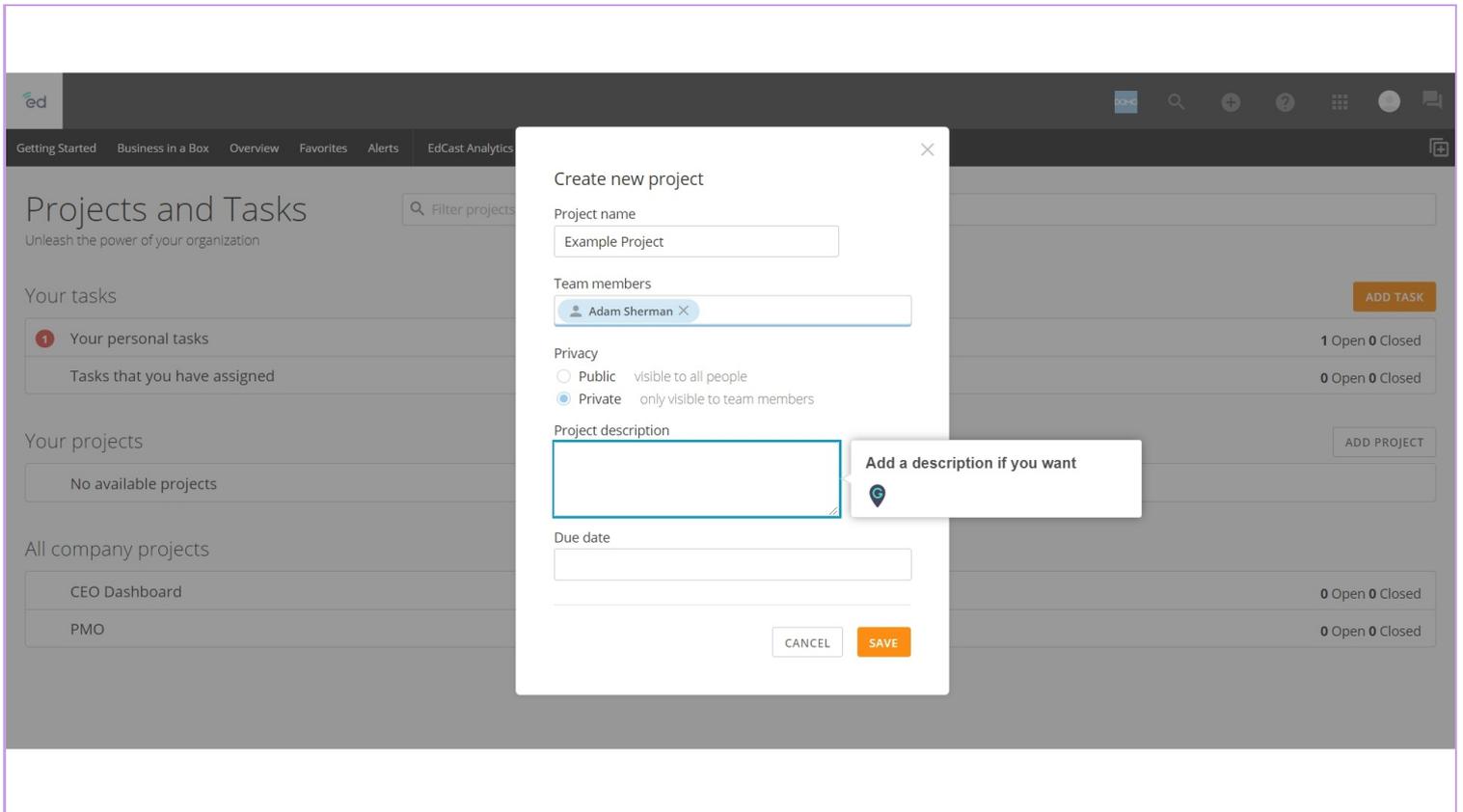
## Privacy

Select "Private" if you want to make this project visible only to team members



# Step: 08

## Add a description if you want



## Step: 09

### Select "Due date"

The screenshot displays a web application interface with a 'Create new project' modal dialog box open. The background shows a 'Projects and Tasks' dashboard with sections for 'Your tasks', 'Your projects', and 'All company projects'. The modal dialog contains the following fields and options:

- Project name:** Example Project
- Team members:** Adam Sherman
- Privacy:**  Public (visible to all people),  Private (only visible to team members)
- Project description:** Demo description
- Due date:** (Empty text input field)

A tooltip with a location pin icon points to the 'Due date' field, containing the text: "Select 'Due date'".

## Step: 10

Click on "Save"

The screenshot displays a web application interface with a 'Create new project' modal dialog box open. The dialog contains the following fields and options:

- Project name:** Example Project
- Team members:** Search users
- Privacy:**  Public (visible to all people),  Private (only visible to team members)
- Project description:** Demo description
- Due date:** Feb 14, 2020

At the bottom of the dialog are 'CANCEL' and 'SAVE' buttons. A callout box points to the 'SAVE' button with the text 'Click on "Save"'. The background shows a 'Projects and Tasks' dashboard with sections for 'Your tasks', 'Your projects', and 'All company projects'.

# Step: 11

## Project has been added!

The screenshot displays a web application interface for project management. At the top, a navigation bar includes the 'ed' logo and menu items: 'Getting Started', 'Business in a Box', 'Overview', 'Favorites', 'Alerts', 'EdCast Analytics', and 'Share'. A search bar and utility icons are on the right. A white notification box in the top center reads 'Project has been added!'. Below the navigation, the main heading is 'Projects and Tasks' with the tagline 'Unleash the power of your organization' and a search input 'Filter projects'. The interface is divided into three sections: 'Your tasks' with an 'ADD TASK' button, 'Your projects' with an 'ADD PROJECT' button, and 'All company projects'. The 'Your tasks' section shows 'Your personal tasks' with 1 Open and 0 Closed tasks, and 'Tasks that you have assigned' with 0 Open and 0 Closed tasks. The 'Your projects' section shows 'Example Project' with 0 Open and 0 Closed projects. The 'All company projects' section lists 'CEO Dashboard' and 'PMO', both with 0 Open and 0 Closed projects. A confirmation message box at the bottom left shows a green checkmark, the text 'Project Added', and 'Example Project' with a close button.

# Thank You!

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