



# Orta!

## User Guide

## Welcome to the Orta User Guide!

We're excited to help you get started with **Orta**. This guide will walk you through all the instructions for using Orta. **Whether you're new to Orta or looking to explore more, we've got you covered!**

**Our goal is simple: To help you get the most out of Orta** and make your project management experience as smooth and efficient as possible.

By using our product, you agree to our [Terms and Conditions](#) and [Privacy Policy](#). We are committed to providing a user-friendly experience and strive to ensure the information in this guide is accurate and up-to-date.

### Important Information:

- **Purpose:**

This guide is intended to assist users in understanding and utilizing the features of Orta.

- **Audience:**

This guide is for all users, beginners, and advanced users.

- **Accuracy:**

While we make every effort to ensure the accuracy of this guide, we cannot guarantee that it is free from errors or omissions.

- **Copyright:**

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- **Contact Information:**

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## How to Use This User Guide Effectively?

This guide is designed to help you make the most of Orta's features. To use it effectively, follow these steps:

- 1. Start with the Basics:** Begin with the **Getting Started** and **Navigating Orta** sections to familiarize yourself with the user interface and core functions.
- 2. Explore Key Features:** Explore Orta's hierarchy, including workspaces, projects, tasks, and calendar to understand how each component works and how they relate to one another.
- 3. Follow Step-by-Step Instructions:** Each section provides clear, numbered steps for performing actions, with visuals marked by corresponding numbers. Follow these steps to complete tasks smoothly and efficiently.
- 4. Use the Table of Contents:** If you're looking for specific information, use the Table of Contents to quickly locate relevant sections and topics.
- 5. Review Visuals:** Pay attention to screenshots and diagrams throughout the guide for a visual understanding of the interface and workflows.

## What is Orta?

**Orta** – **Organizing Tasks** is project management tool designed to simplify the complexities of task tracking, scheduling, and team communication. Our tool enables you to effortlessly break down intricate projects, assign tasks, and ensure seamless collaboration, all from one centralized platform.

Whether you're managing a small team or large-scale projects, Orta streamlines your workflow so you can stay focused on achieving your goals.



## Getting Started

To ensure a smooth start with **Orta**, this section will guide you through setting up your account and navigating the platform. By the end of this section, you'll be able to:

- Create a new account.
- Set up your first workspace.
- Create your first project.
- Log in into Orta.
- Understand Orta's user interface.

Let's get started!

## Create Your Orta Account:

To begin organizing your tasks, let's create an account first.

### 1. Access the Account Creation Page:

- Go to the [Create Your Orta Account](#) page in your web browser.

The screenshot shows the Orta! account creation interface. It features a white form on a light blue background. The form has the following elements: a title 'Create an Account' with a subtitle 'Sign up and continue with email'; an 'Email' field containing 'james@gmail.com'; 'First Name' and 'Last Name' fields containing 'James' and 'White' respectively; 'Password' and 'Confirm Password' fields with masked characters; a checked checkbox for 'I agree to the Terms and Privacy Policy'; a prominent red 'Sign Up' button; and a 'Sign Up With Google' button. Blue callout bubbles with numbers 2, 3, and 4 highlight specific parts of the form: 2 points to the title, 3 points to the confirm password field, and 4 points to the sign up button. A 'Login' link is visible at the bottom of the form.

Figure 1 Create an Account

### 2. Enter Account Details:

- In the **Create an Account** dialog box, enter the required details, such as **Email**, **Name**, and **Password**.

### 3. Review and Agree to Terms:

- Review the **Terms and Privacy Policy** and select the checkbox to agree to them.

### 4. Complete Account Creation:

- Finally, Click **Sign Up** to complete your Orta account creation.

*Note: You can also select **Sign Up with Google** to create your account using Gmail.*

## Confirm Your Email Address

You have to confirm your email address to begin using our tool. Here's how you do it:

1. Open your email inbox and locate the confirmation email from **Orta**.
  - Check your spam or junk folder if you can't find it in your inbox.
2. Select the **Confirm Email Address** link in the email.
3. Once confirmed, you will be redirected to set up your workspace.

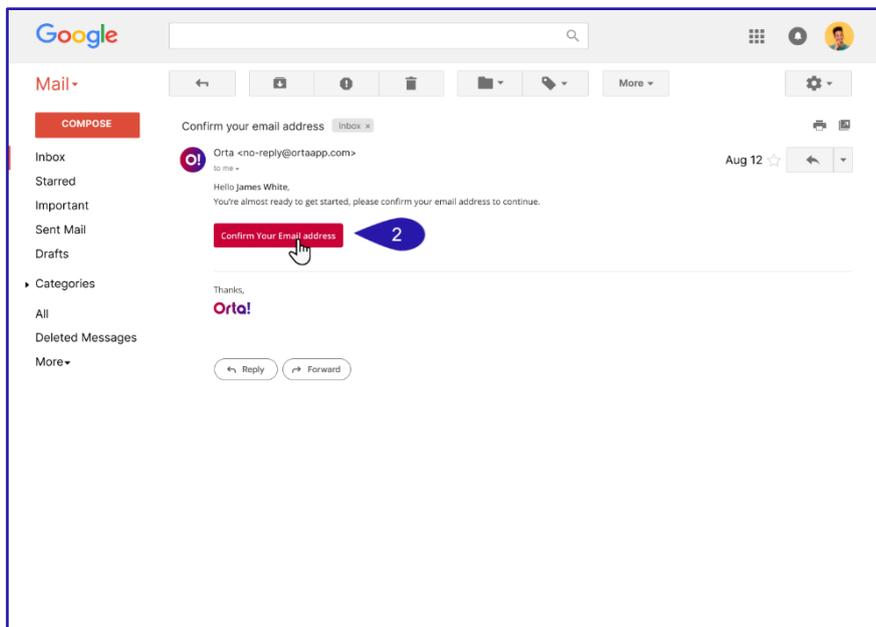


Figure 2 Confirm Your Email Address

## Log in to Orta

Before moving on to creating a new workspace, let's take a look at the **log in** and **forgot password** process. If you want to skip ahead, click [Create Your First Workspace](#).

To Log into your account do the following:

### 1. Go to the login page:

- Open any web browser and enter the provided URL to navigate to the login page.

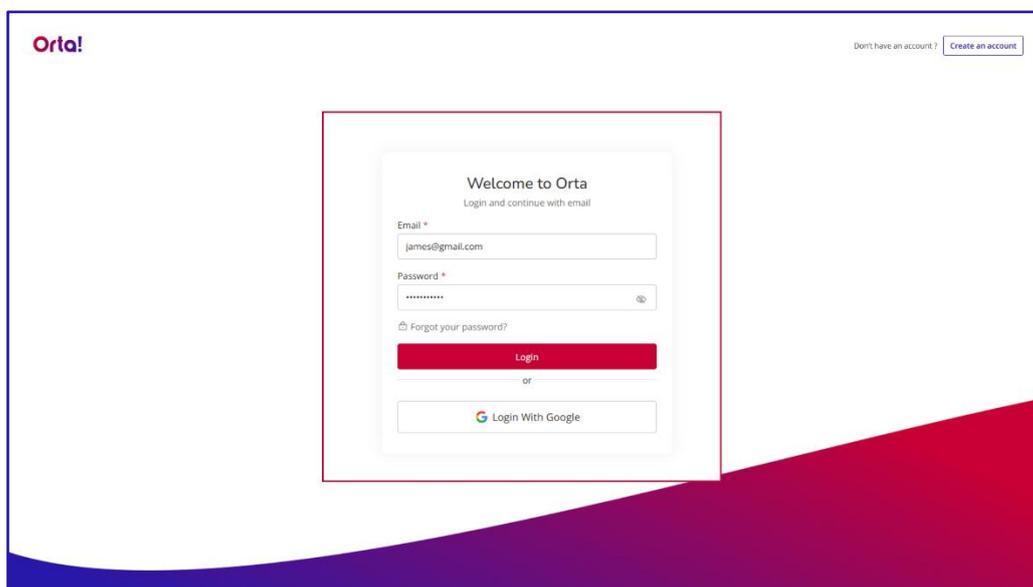


Figure 3 Login

### 2. Sign in:

- Enter your **Email ID** and **Password** in the **Welcome to Orta** dialog box.
- Click the **Login** button to proceed.

### 3. Login with Google:

- Alternatively, you can click the **Login with Google** option to sign in using your Google account.

## Forgot password

In case you forgot your password, do the following to retrieve your account access:

### 1. Request a Reset:

- Go to the Orta Login page.
- Click the **Forgot your password?** link below the password field.

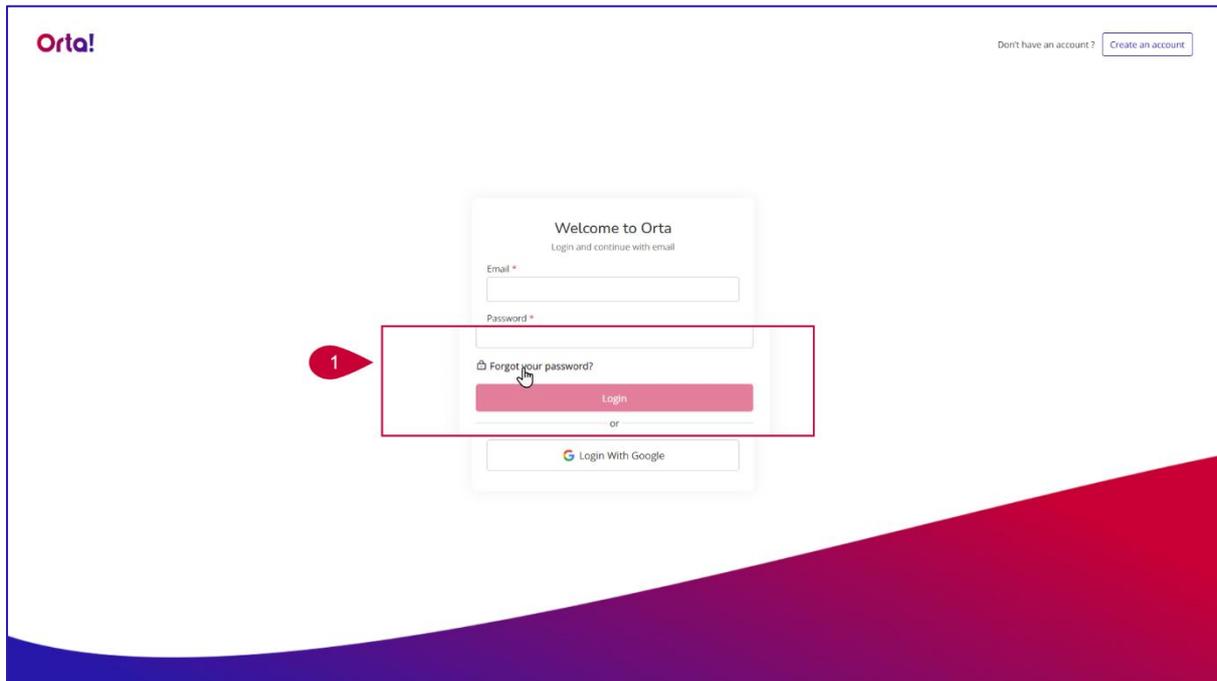


Figure 4 Forgot your password?

### 2. Submit Your Email:

- Enter your email address on the next page.
- Click **Send Link** and then check your inbox for an email from Orta.

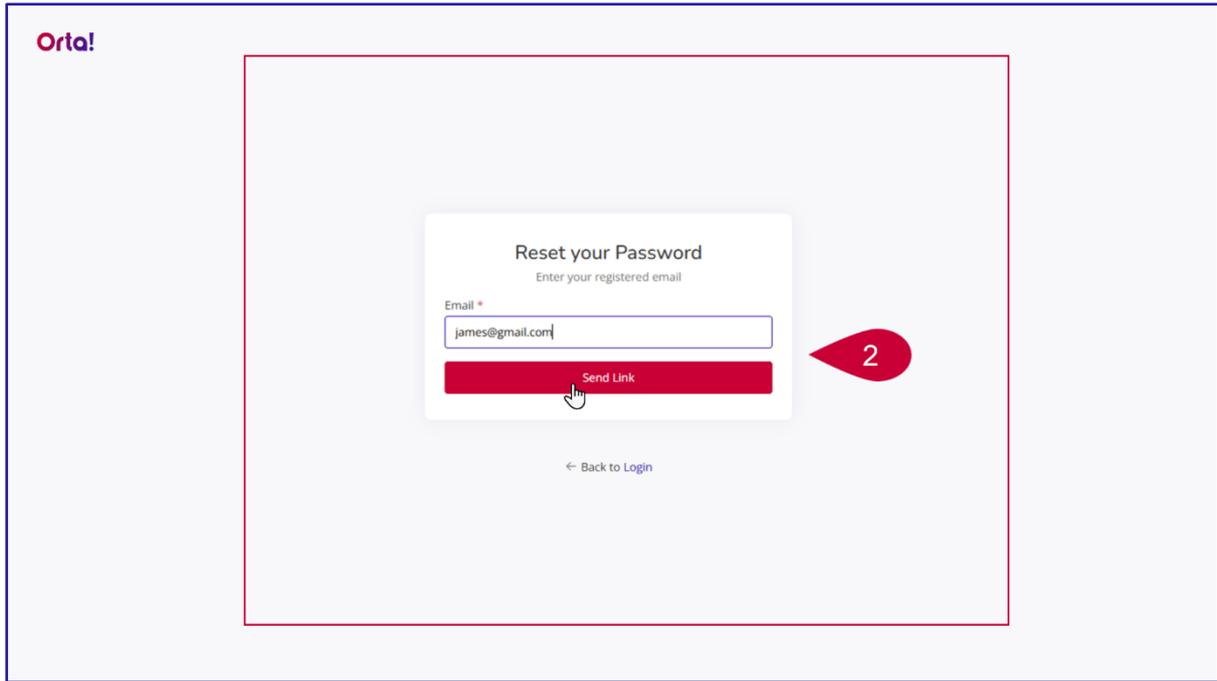


Figure 5 Reset Your Password

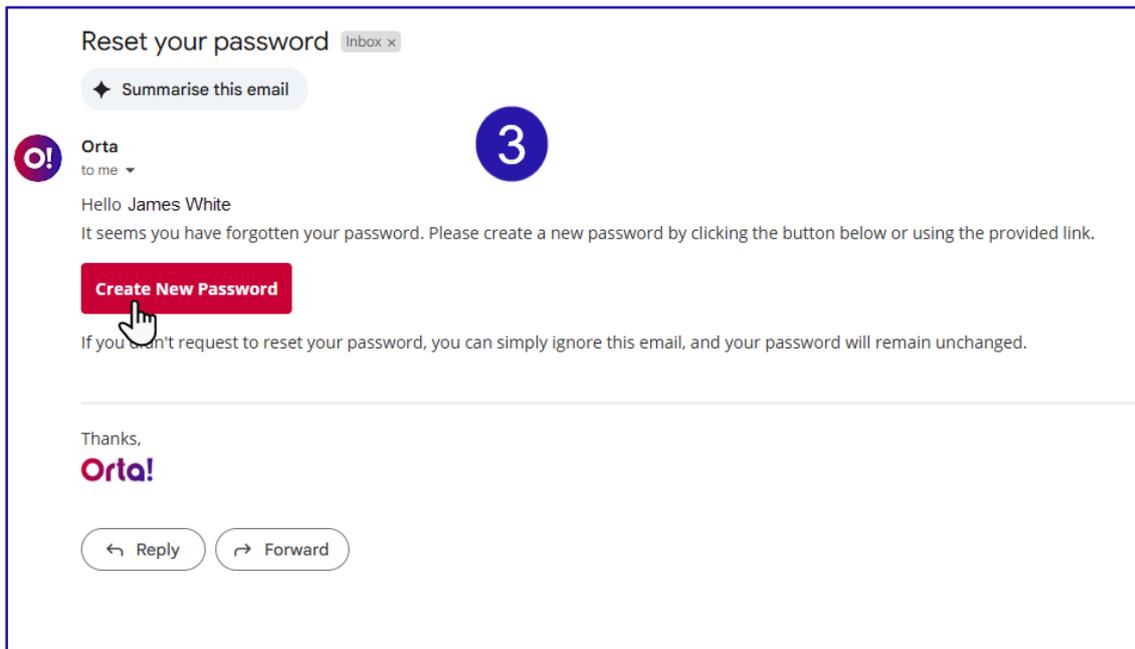


Figure 6 Create New Password Email

### 3. Reset Your Password:

- Open the email and click the **Create New Password** button.
- On the reset page, enter and confirm your new password.
- Finally, click **Save Changes** to complete the process.

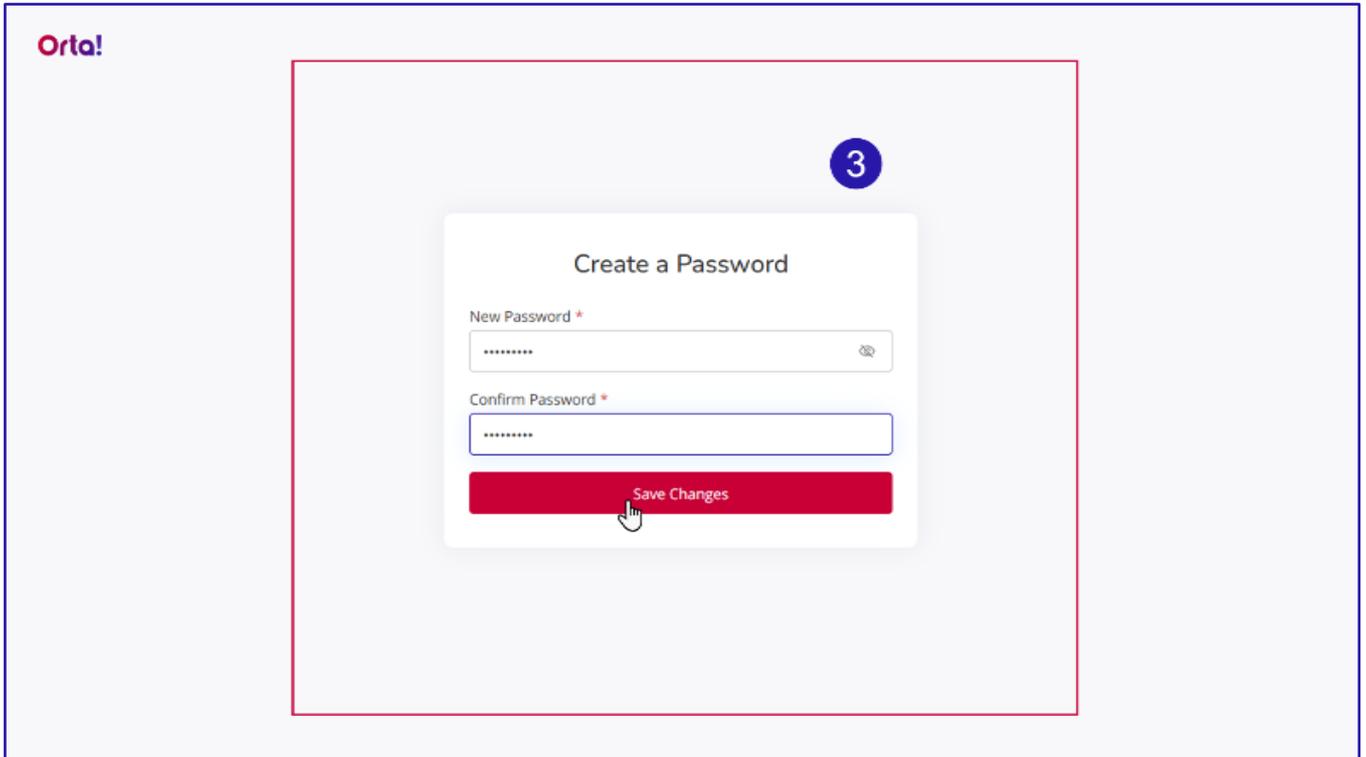
The image shows a screenshot of the Orta! user interface. In the top left corner, the Orta! logo is visible. The main content area is a light gray box containing a white form titled "Create a Password". The form has two input fields: "New Password \*" and "Confirm Password \*", both containing masked characters (dots). Below the fields is a red button labeled "Save Changes". A blue circle with the number "3" is positioned in the top right corner of the form area, indicating the current step in a sequence. A mouse cursor is pointing at the "Save Changes" button.

Figure 7 Create a Password

## Create Your First Workspace

Now, let's get back to usual getting started flow. Once your email is confirmed, you'll be directed to set up your first workspace. Orta provides workspace categories to match both your educational and professional requirements.

Here's how to set up your first Workspace:

### For Student:

#### 1. Enter a Workspace Name:

- Type a desired name in the **Workspace Name** text box.

#### 2. Select Workspace Category:

- Choose a category that fits your needs (e.g., select **I'm a Student**).

#### 3. Finalize Creation:

- Review your selections and click **Continue** to finish.

Orta!

Welcome, James White

### Setup Your Workspace

Workspace Name \*

My Workspace

Your Workspace Category \*

I'm a Student  
For educational purposes only.

Professional  
Organizational or personal use.

Continue

Figure 8 Set Up Workspace

## For Professional:

1. Enter a Workspace Name:
  - Type a desired name in the **Workspace Name** text box.
2. Select Workspace Category:
  - Choose a category that fits your needs (e.g., select **Professional**).

The screenshot shows the Orta! 'Setup Your Workspace' form. On the left, there is an illustration of two people looking at a board with sticky notes, with the text 'A Tool for Organizing Your Workspace' above it. The form itself is on the right and contains the following fields and options:

- Welcome, James White**
- Setup Your Workspace**
- Workspace Name \***: Text input field containing 'Beta' (Callout 1).
- Your Workspace Category \***: Radio button options: 'I'm a Student' (For educational purposes only.) and 'Professional' (Organizational or personal use.) (Callout 2).
- Type of Industry \***: Dropdown menu showing 'Software Development' (Callout 3).
- Team Size \***: Dropdown menu showing '1-10' (Callout 4).
- Job Title**: Text input field containing 'Product Designer 1' (Callout 5).
- Continue**: Red button (Callout 6).

Figure 9 Setup Workspace Professional

3. Type of Industry:
  - Choose an industry from the **Type of Industry** dropdown.
4. Team Size:
  - Choose your **Team Size**.
5. Job Title:
  - Enter your **Job Title**.
6. Finalize Creation:
  - Review your selections and click **Continue** to finish.

## Organizational Email:

Orta will quickly fetch the workspace name for you when you sign up using an organization email address.

Welcome, James White  
**Setup Your Workspace**

Workspace Name \*  
bussinesssolution.com

Type of Industry \*  
Software Development

Team Size \*  
1-10

Job Title  
Product Designer 1

Continue

If your organization already has a workspace, you'll be directed to the **Join Workspace** page when signing up with your organization email. From there, you can choose to join the existing workspace or create a new one.

Orta!

HV Hamsa Mohan

**Join Workspace**

Already have a workspace associated with this email domain thanjavureports.com

thanjavureports.com 1 Member Join

or

Would you like to create new? Create Workspace

Figure 10 Join Workspace

Upon selecting the **Create Workspace** link, you will be directed to the **Setup Your Workspace** page. Just select your **Type of Industry**, **Team size**, and **Job Title** to complete the setup process.

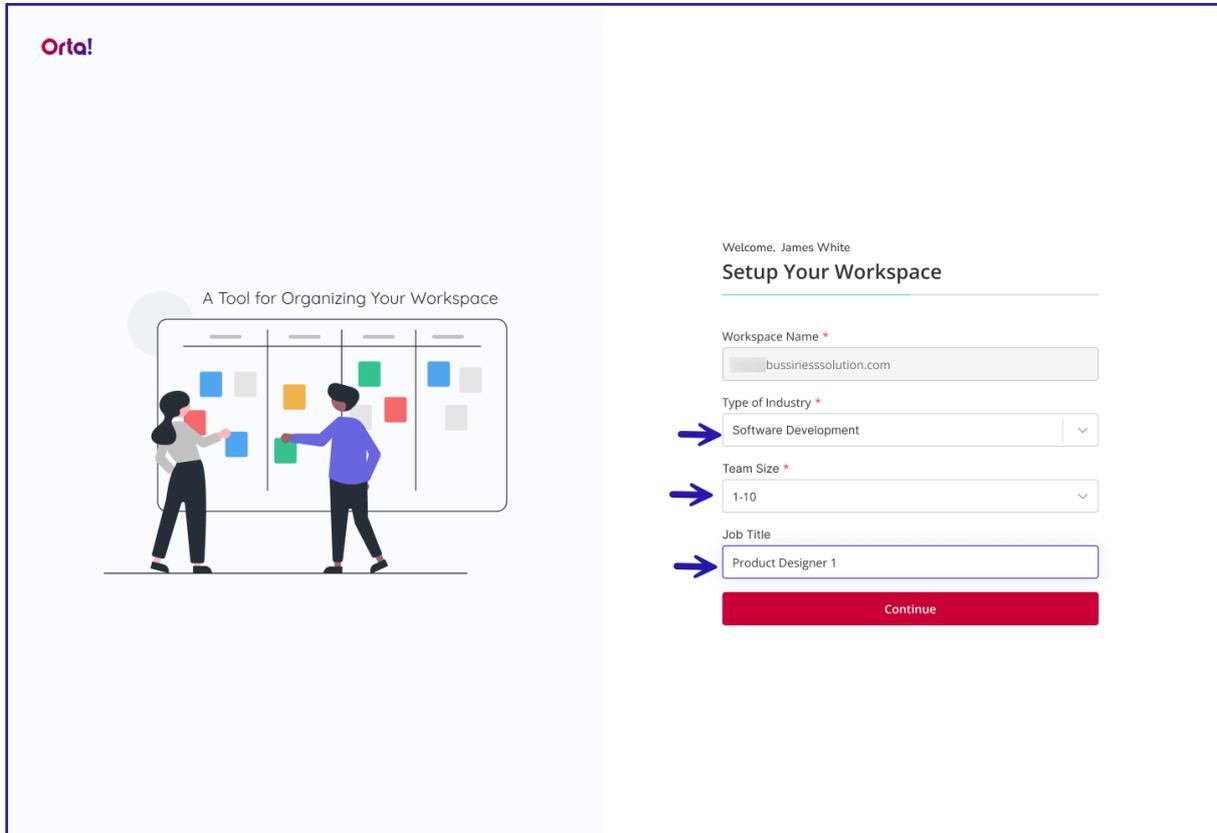


Figure 11 Setup Workspace Organizational

## Create Your First Project

Your workspace now needs a project to group your tasks and get started with your work. To create your first project on Orta, follow these steps:

### 1. Enter the project Name:

- Enter the project name in the **Project Name** text box.

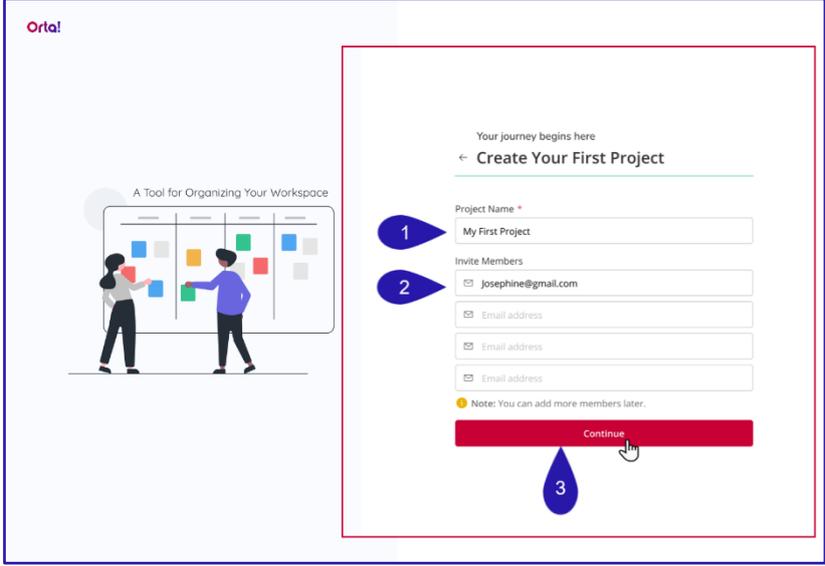


Figure 12 Create your first project

### 2. Add Teammates:

- To add teammates to the project, enter their email addresses under **Invite Members**.

### 3. Finalize and Proceed:

- Click **Continue** to create your project and proceed to the homepage.

*Note: Since **Project Name** is a required field, you cannot proceed without entering a name, though you can invite project members later.*

## Navigating Orta

- Once you finish creating your first project, you'll be directed to the main user interface.
- The main user interface in Orta is designed to be intuitive, making navigation effortless. Our primary goal is to reduce the complexity often associated with modern project management tools.

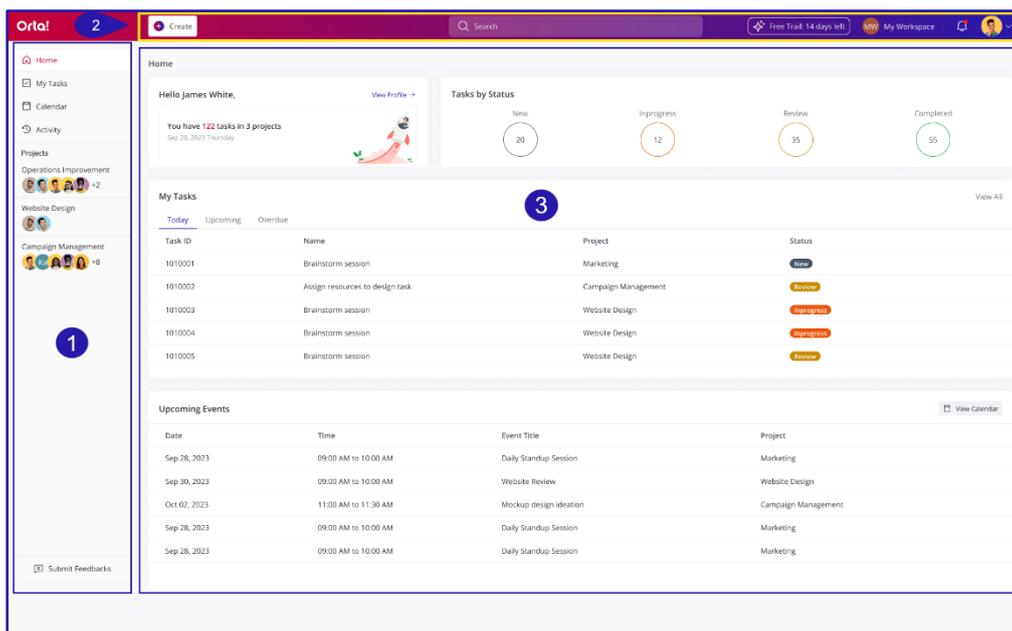


Figure 13 Navigating Orta

Now, let's take a moment to explore the layout of the main interface before moving onto creating Tasks.

### Main interface

User interface in Orta consists of three sections:

1. **Sidebar.**
2. **Top bar.**
3. **Main panel** (Changes based on the menu the user selects).

## Sidebar

**Sidebar** in Orta features essential menus to kickstart your day, including options for **Project Management, Task Management, Event Management,** and more.

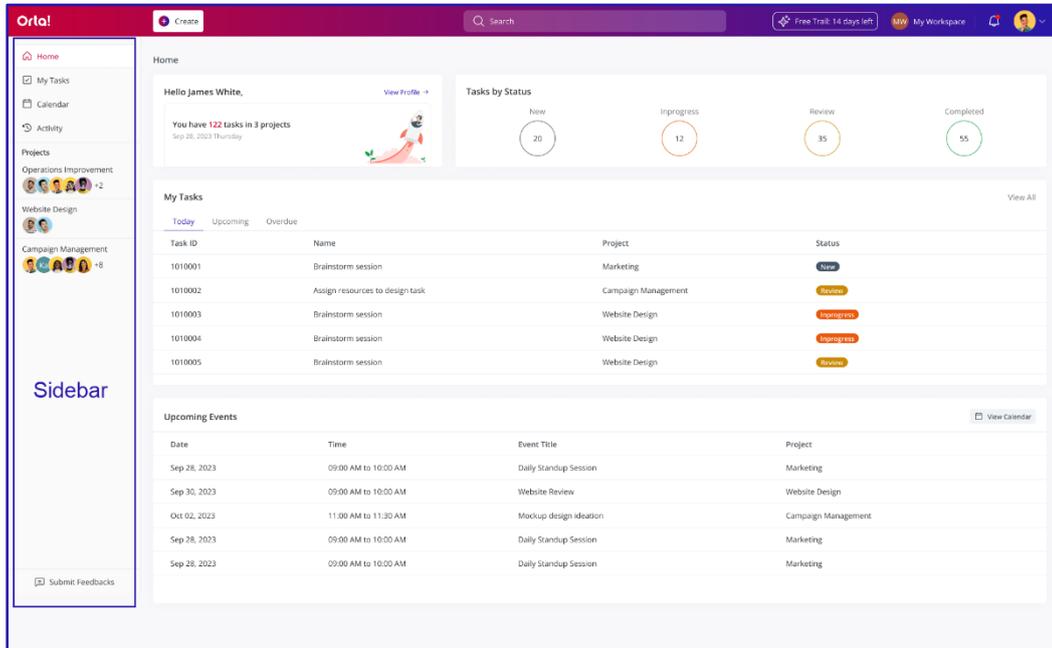


Figure 14 Sidebar

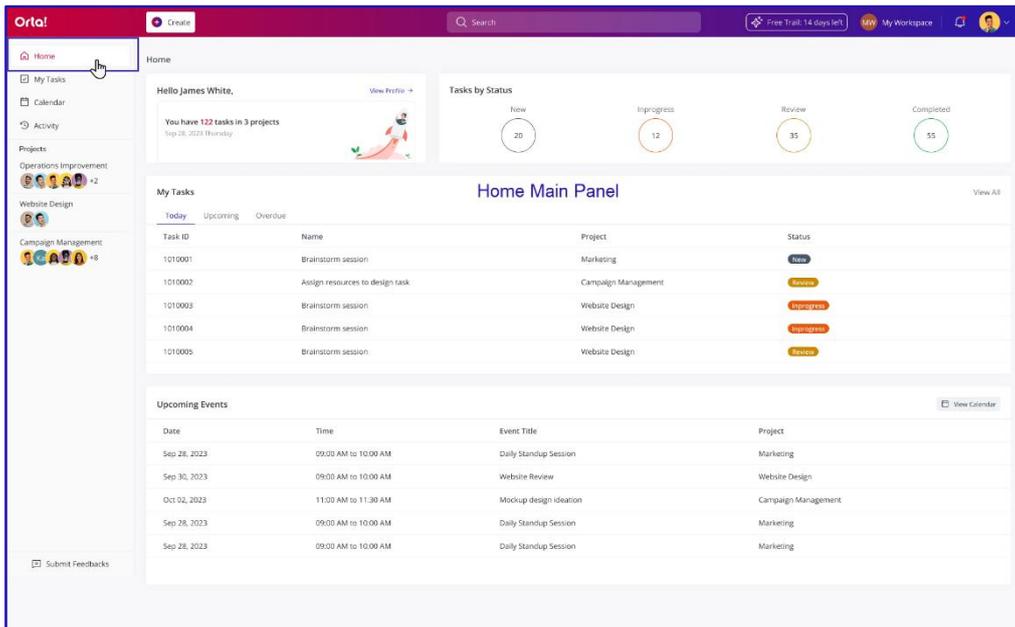
Here's a quick overview of all the options you'll find in the sidebar.

### Home page

- To view the **Home** page main panel click on  the menu.

In the **Home** page main panel you can view and access the following widgets:

- **Welcome** – A brief overview of your workspace projects with a convenient link to view your profile.
- **Tasks by Status** – Displays task counts for each stage - New, In Progress, Review, and Completed.
- **My Tasks** – A snapshot of tasks scheduled for Today, Upcoming, and those that are Overdue.
- **Upcoming Events** – A quick view of all scheduled future events.



The screenshot shows the Orta! Home page. The sidebar on the left contains navigation items: Home (selected), My Tasks, Calendar, Activity, and Projects. The main content area is titled 'Home' and includes a 'Hello James White' greeting with a 'View Profile' link. Below the greeting is a 'Tasks by Status' widget showing four categories: New (20), In Progress (12), Review (35), and Completed (55). The 'My Tasks' section is titled 'Home Main Panel' and has tabs for 'Today', 'Upcoming', and 'Overdue'. It displays a table of tasks with columns for Task ID, Name, Project, and Status. The 'Upcoming Events' section at the bottom shows a list of events with columns for Date, Time, Event Title, and Project.

Task ID	Name	Project	Status
1010001	Brainstorm session	Marketing	New
1010002	Assign resources to design task	Campaign Management	In Progress
1010003	Brainstorm session	Website Design	In Progress
1010004	Brainstorm session	Website Design	In Progress
1010005	Brainstorm session	Website Design	New

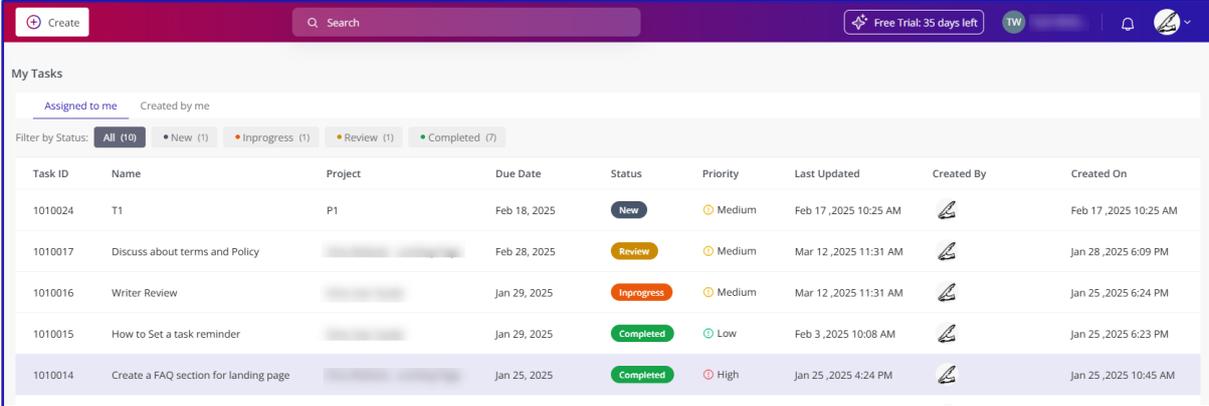
Date	Time	Event Title	Project
Sep 28, 2023	09:00 AM to 10:00 AM	Daily Standup Session	Marketing
Sep 30, 2023	09:00 AM to 10:00 AM	Website Review	Website Design
Oct 02, 2023	11:00 AM to 11:30 AM	Mockup design ideation	Campaign Management
Sep 28, 2023	09:00 AM to 10:00 AM	Daily Standup Session	Marketing
Sep 28, 2023	09:00 AM to 10:00 AM	Daily Standup Session	Marketing

Figure 15 Home

## My Tasks

1. Click on  to open the **My Tasks** main section.

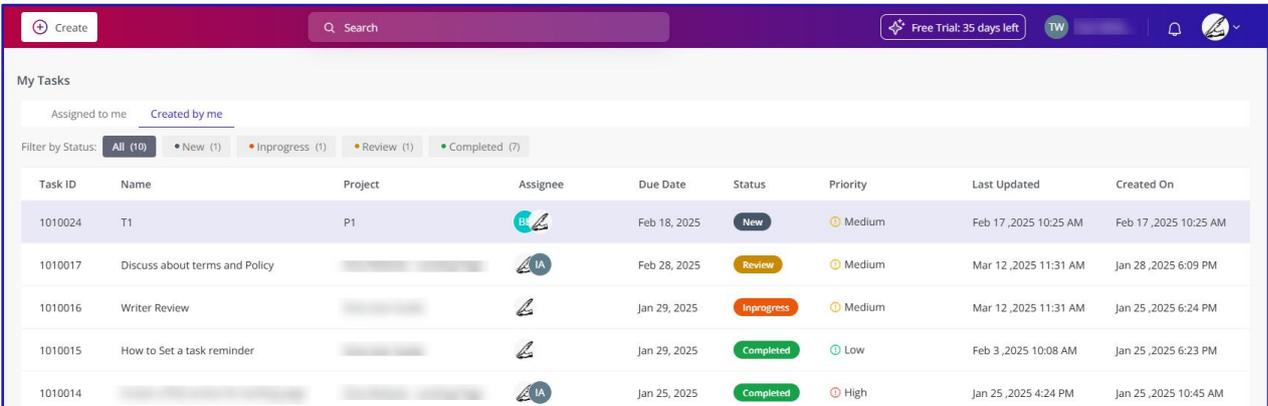
- **My Tasks** Section contains **Assigned to Me** and **Created by Me** tabs.



Task ID	Name	Project	Due Date	Status	Priority	Last Updated	Created By	Created On
1010024	T1	P1	Feb 18, 2025	New	Medium	Feb 17, 2025 10:25 AM		Feb 17, 2025 10:25 AM
1010017	Discuss about terms and Policy		Feb 28, 2025	Review	Medium	Mar 12, 2025 11:31 AM		Jan 28, 2025 6:09 PM
1010016	Writer Review		Jan 29, 2025	Inprogress	Medium	Mar 12, 2025 11:31 AM		Jan 25, 2025 6:24 PM
1010015	How to Set a task reminder		Jan 29, 2025	Completed	Low	Feb 3, 2025 10:08 AM		Jan 25, 2025 6:23 PM
1010014	Create a FAQ section for landing page		Jan 25, 2025	Completed	High	Jan 25, 2025 4:24 PM		Jan 25, 2025 10:45 AM

Figure 16 Assigned to me

- In the **Assigned to Me** tab, you will see all the tasks assigned to you across every project in the current workspace.



Task ID	Name	Project	Assignee	Due Date	Status	Priority	Last Updated	Created On
1010024	T1	P1		Feb 18, 2025	New	Medium	Feb 17, 2025 10:25 AM	Feb 17, 2025 10:25 AM
1010017	Discuss about terms and Policy			Feb 28, 2025	Review	Medium	Mar 12, 2025 11:31 AM	Jan 28, 2025 6:09 PM
1010016	Writer Review			Jan 29, 2025	Inprogress	Medium	Mar 12, 2025 11:31 AM	Jan 25, 2025 6:24 PM
1010015	How to Set a task reminder			Jan 29, 2025	Completed	Low	Feb 3, 2025 10:08 AM	Jan 25, 2025 6:23 PM
1010014				Jan 25, 2025	Completed	High	Jan 25, 2025 4:24 PM	Jan 25, 2025 10:45 AM

Figure 17 Created by me

- In the **Created by Me** tab, you will see all the tasks created by you across every project in the current workspace.

### Filter by Status:

You can use the **Filter by Status** option to view tasks based on their status.

1. Select a status filter to view the corresponding tasks.

The figure shows three sequential screenshots of a task management interface, each demonstrating a different status filter. Each screenshot includes a header with 'Filter by Status:' and a list of status options: All (5), New (2), Inprogress (1), Review (1), and Completed (1). The 'Review' filter is selected in the first screenshot, 'Inprogress' in the second, and 'New' in the third.

Task ID	Name	Project	Assignee	Due Date	Status	Priority	Last Updated	Created On
<b>Tasks in review</b>								
1010403	Task 4	P2	HV	Jan 10, 2025	Review	Medium	Jan 7, 2025 10:53 AM	Jan 7, 2025 10:52 AM
<b>Tasks in progress</b>								
1010407	T1	P1	HV	Jan 07, 2025	New	High	Jan 7, 2025 4:08 PM	Jan 7, 2025 4:08 PM
1010402	Task 3	P2	HV	Jan 09, 2025	New	Low	Jan 7, 2025 10:53 AM	Jan 7, 2025 10:52 AM
1010401	Task 2	P2	HV	Jan 09, 2025	Inprogress	High	Jan 7, 2025 10:51 AM	Jan 7, 2025 10:50 AM
<b>New Tasks</b>								
1010407	T1	P1	HV	Jan 07, 2025	New	High	Jan 7, 2025 4:08 PM	Jan 7, 2025 4:08 PM
1010402	Task 3	P2	HV	Jan 09, 2025	New	Low	Jan 7, 2025 10:53 AM	Jan 7, 2025 10:52 AM

Figure 18 Filter by Status

## Calendar

1. Click on  Calendar to access **Calendar** main panel.

In the **Calendar** main panel you can:

- View your calendar.
- Create events.

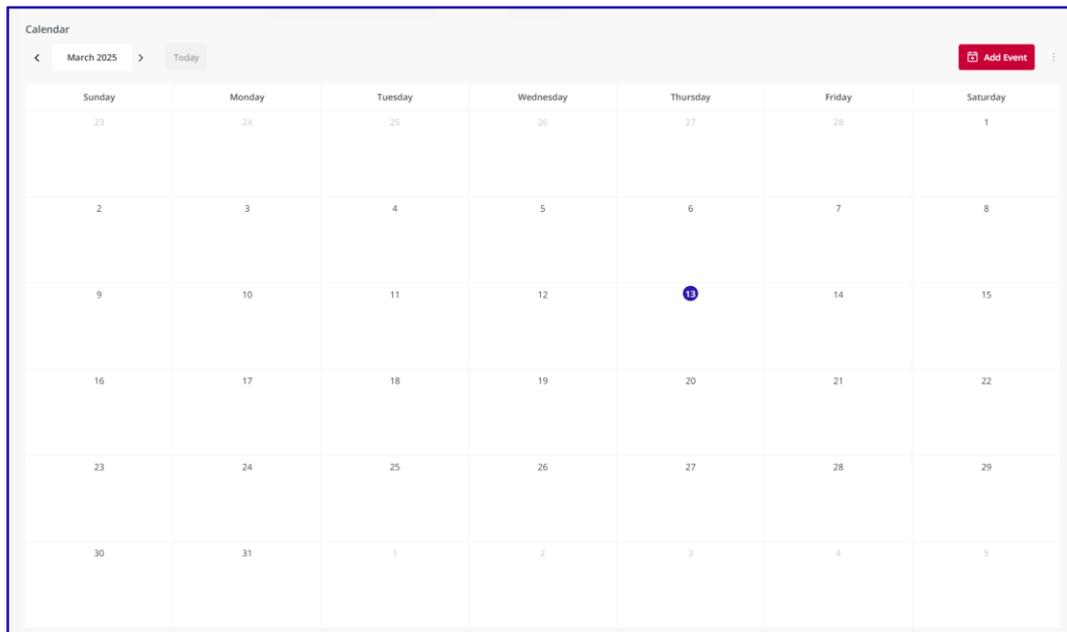


Figure 19 Calendar

## Activity

1. Click on  Activity to view the **Calendar** main panel.

In the **Activity** main panel you can view all your activity in Orta.

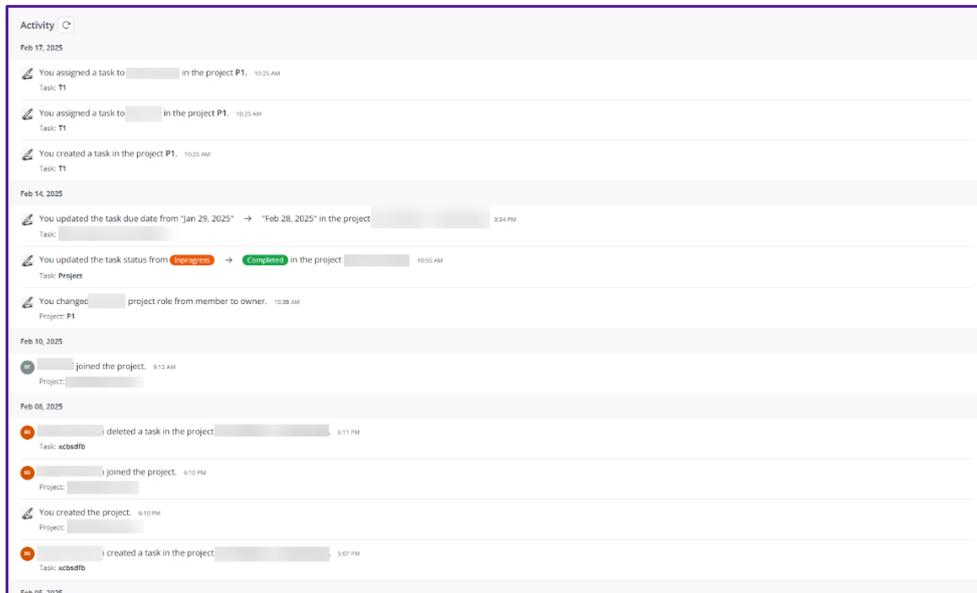


Figure 20 Activity

## Submit feedback

Click  Submit Feedbacks at the bottom of the sidebar to provide feedback about our application.

## Projects

1. In the sidebar, go to the **Projects** section to view all projects in the current workspace.
  - Select a project from the list to open its main panel.

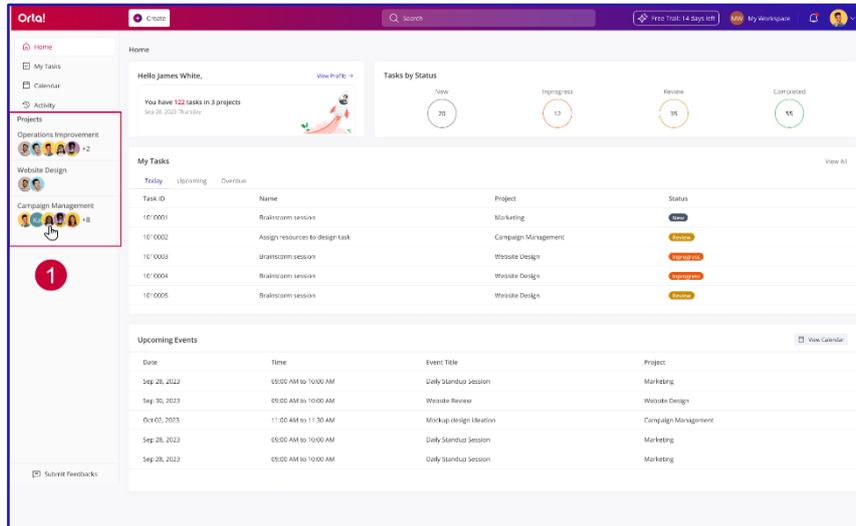


Figure 21 Projects Field

- The project's main panel includes essential options such as the **Overview** tab, **Tasks** tab, **Members** widget, and **Add Task** button.

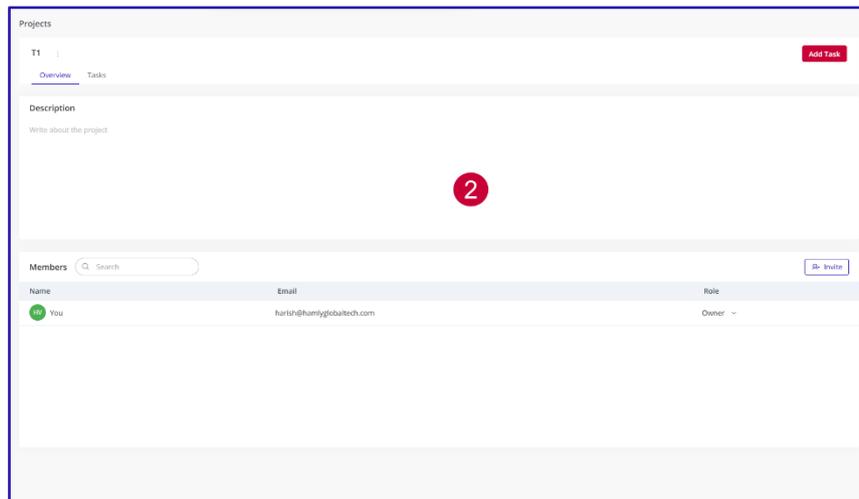


Figure 22 Projects main panel

## Top bar

Now that we have covered everything about the sidebar, let's focus on the **Top Bar**.

For effortless navigation, **Top Bar** in Orta provides quick access to our key features. Users can manage their profile, view notifications, perform searches, and quickly create projects, tasks, events, or invite members from the **Top bar**.

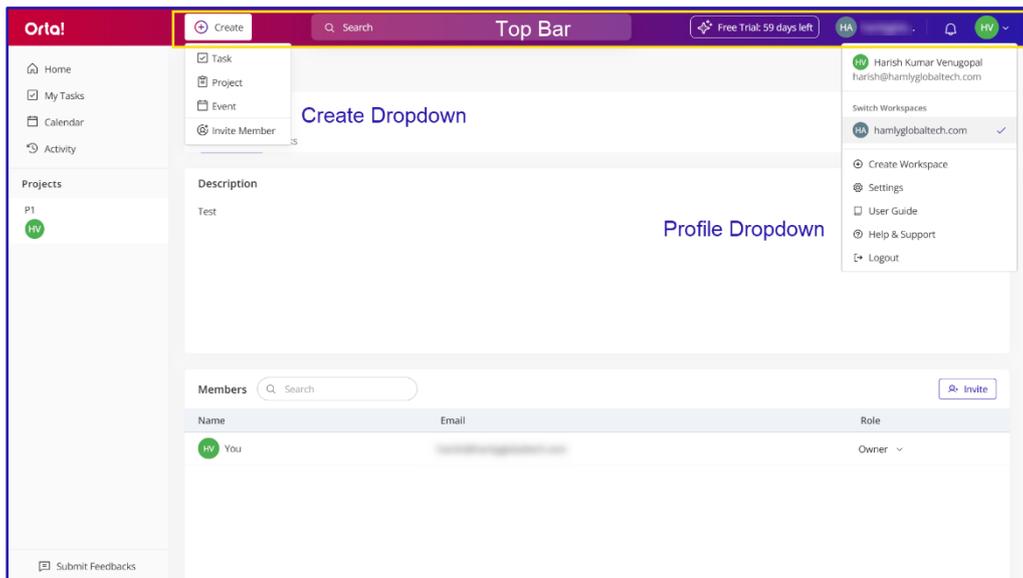


Figure 23 Top bar

Here's a look at what **Top bar** has to offer:

### *Profile dropdown*

The **Profile** dropdown in Orta allows users to switch workspaces, create a new workspace, and configure settings, access Help & Support, and log out.

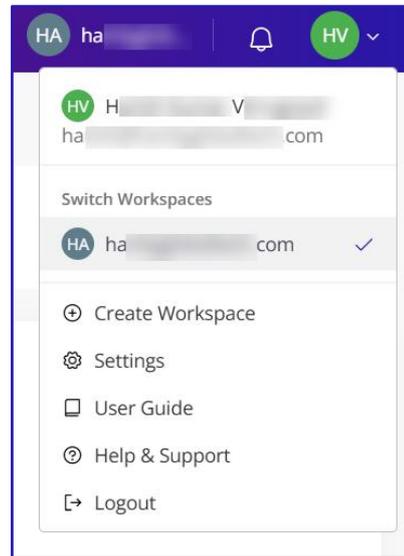


Figure 24 Profile dropdown

### *Notifications*

The **Bell** icon in Orta represents notifications. Click on it to view alerts about updates, reminders, or activities related to your workspace. A badge on the icon indicates the number of unread notifications.

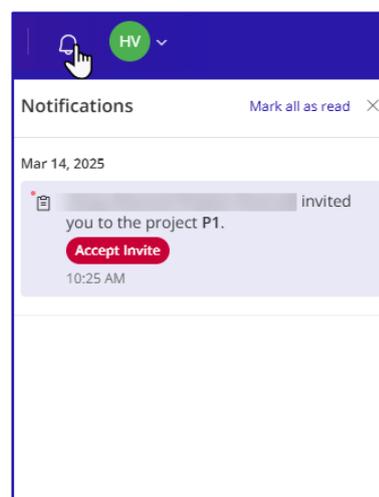


Figure 25 Notifications

### Search bar

Our **Search** field allows user to quickly find specific items such as projects, tasks, members, and other relevant items in Orta. Simply type your query, and relevant results will be displayed in real-time or after pressing **Enter**. You can also enter a **Task ID** in the search bar to find a specific task.

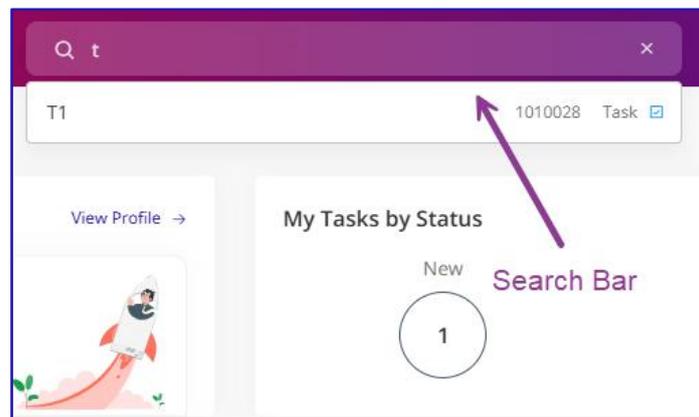


Figure 26 Search bar

### Create

The top bar in Orta features a dedicated **Create** button that enables you to easily create new projects, tasks, events and invite team members.

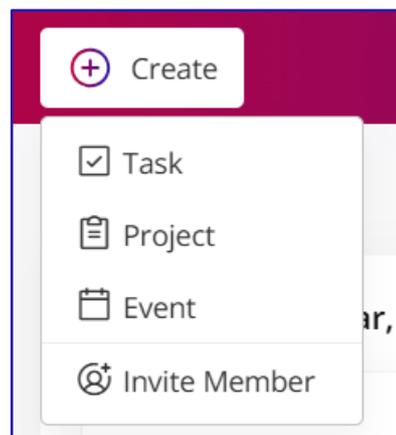
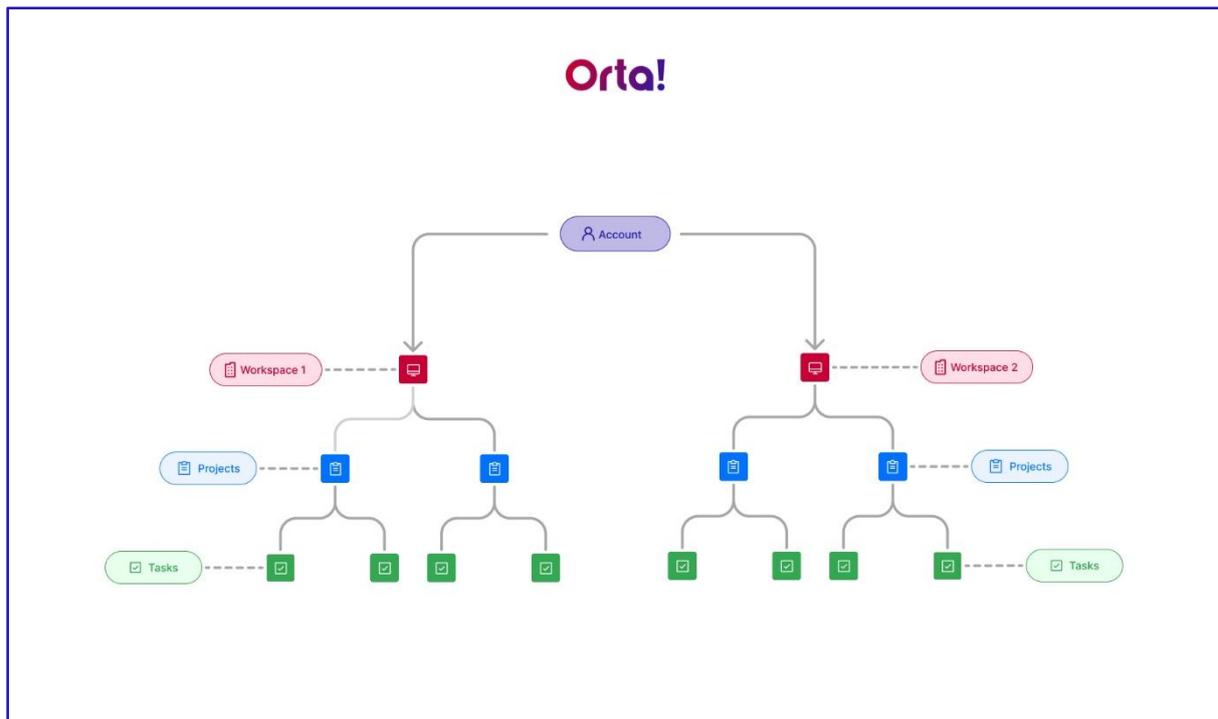


Figure 27 Create

## Orta Hierarchy

Now that you have a clearer picture of Orta's User Interface, it's time to explore the hierarchy of our project management tool. Understanding how each level of module connects with another enables users to use our tool efficiently.

Orta provides a simple yet effective framework to manage your workflow. We follow a logical three-tier structure: **Workspace**, **Projects**, and **Tasks** to enhance your focus and productivity. Let's begin with the top level: the **Workspace**.

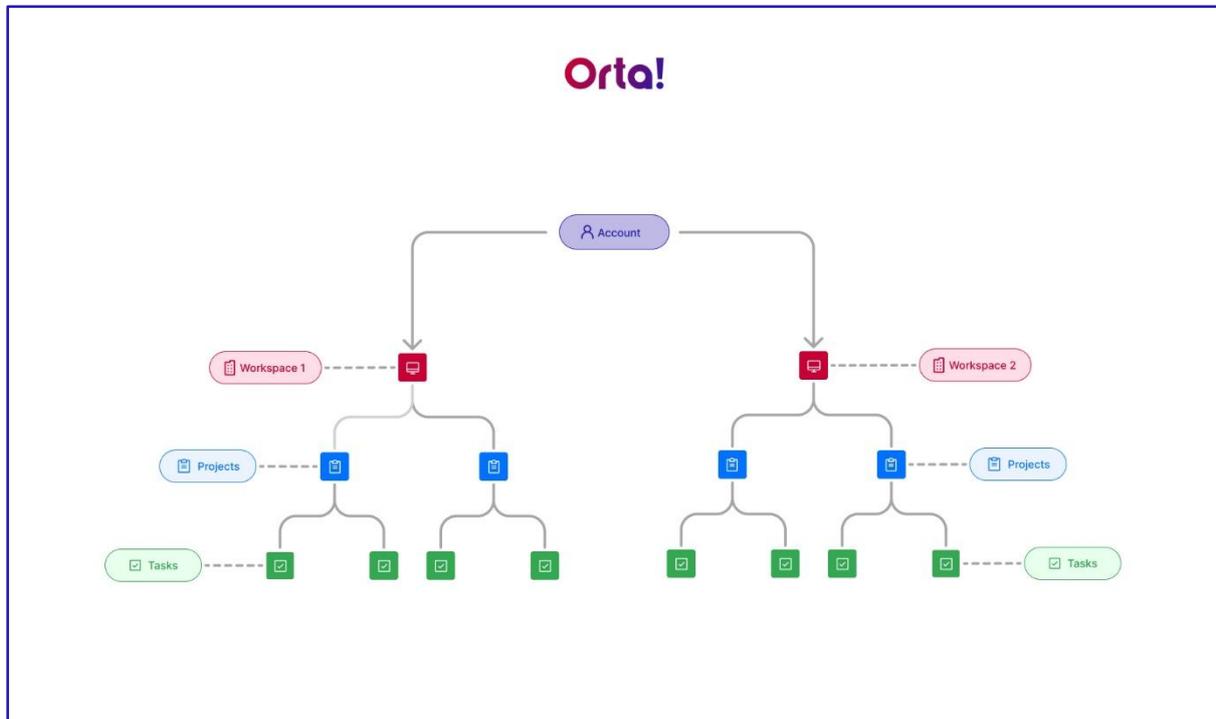


### Workspace: The Big Picture

The **Workspace** serves as your central hub, encompassing all your projects and tasks. Imagine it as your digital headquarters, a single location to organize work for your team, department, or even the entire company.

## Projects: Group Your Goals

**Projects** reside within the Workspace, acting as containers for related work. Each project represents a specific goal or initiative. Within a project, you can assign tasks, track progress, and ultimately achieve your objectives.



## Tasks: Get Things Done

**Tasks** are the fundamental building blocks of Orta's Hierarchy. They represent the individual steps necessary to complete a project. By assigning tasks, setting deadlines, and monitoring progress, you ensure that work moves forward efficiently.

## Roles and Permissions

**Roles and Permissions** in Orta determine what actions users can perform within modules like Workspace, Project, and Task. By assigning roles such as Owner, Manager, or Member, Orta ensures users have the right access while protecting sensitive data, enhancing collaboration and efficiency.

Click [User Roles and Permissions](#) to view the module level access for each role.

## Key actions in Orta

Now that we have a clear understanding of Orta's hierarchy, let's dive into the key actions you can perform at each level – **Workspaces**, **Projects**, **Tasks** and **Calendar**. Mastering these actions will help you navigate Orta with ease. We'll start with the **Workspace**.

## Workspace

As we mentioned earlier, the workspace is where all your work comes together, including projects and tasks. Effectively managing your workspace is crucial for team collaboration and project success. Here are some key actions that enable you to do just that:

### Create a new workspace

You can easily create a new workspace in Orta from the profile dropdown.

1. Click on the **Profile** icon from the top bar.
2. Select **Create Workspace** option from the list.

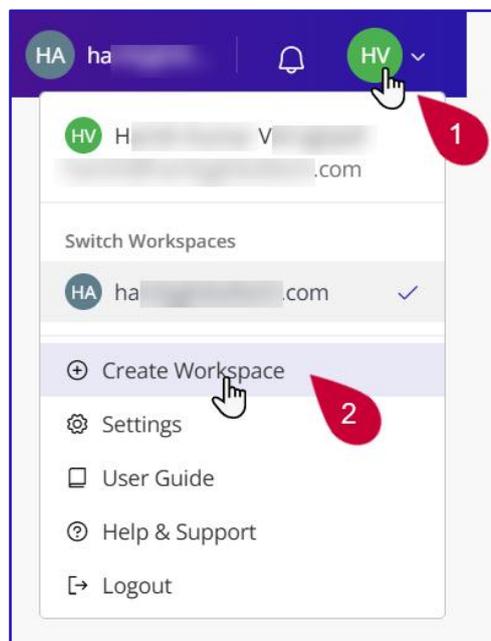


Figure 28 Create Workspace

## For Student:

## 1. Enter a Workspace Name:

- Type a desired name in the **Workspace Name** text box.

## 2. Select Workspace Category:

- Choose a category that fits your needs (e.g., select **I'm a Student**).

## 3. Finalize Creation:

- Review your selections and click **Continue** to finish.

Orta!

A Tool for Organizing Your Workspace

Create New Workspace

Workspace Name \*  
My Workspace

Your Workspace Category \*  
 I'm a Student  
For educational purposes only.  Professional  
Organizational or personal use.

Continue

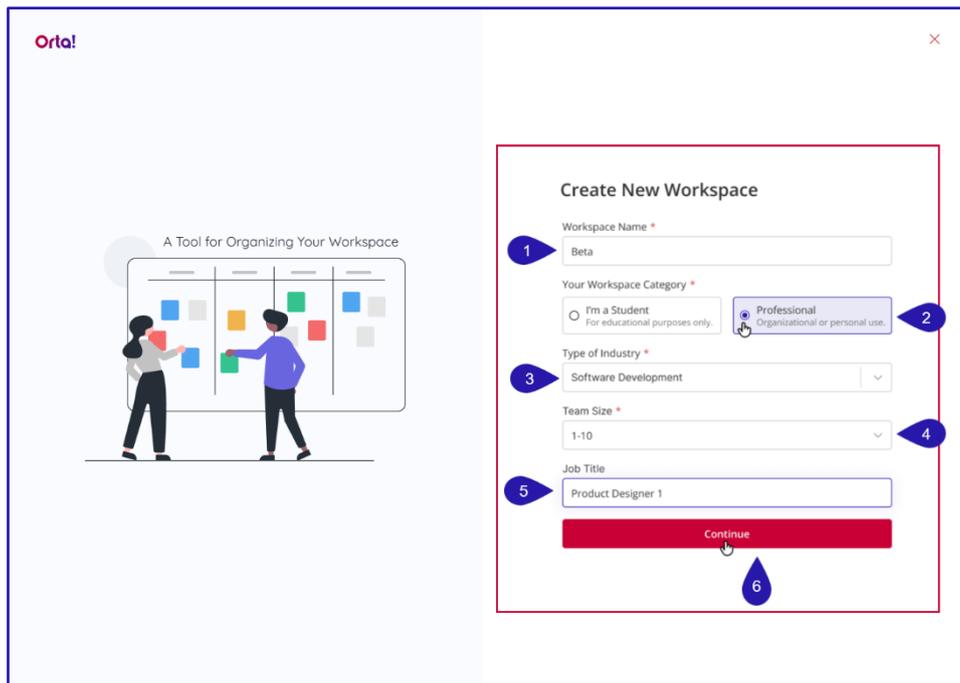
Figure 29 Set Up Workspace

**For Professional:****1. Enter a Workspace Name:**

- Type a desired name in the **Workspace Name** text box.

**2. Select Workspace Category:**

- Choose a category that fits your needs (e.g., select **Professional**).



The screenshot shows the Orta! 'Create New Workspace' form. On the left, there is an illustration of two people looking at a board titled 'A Tool for Organizing Your Workspace'. The form on the right contains the following fields and options:

- 1**: Workspace Name \* (Text input: Beta)
- 2**: Your Workspace Category \* (Radio buttons:  I'm a Student (For educational purposes only.),  Professional (Organizational or personal use.))
- 3**: Type of Industry \* (Dropdown menu: Software Development)
- 4**: Team Size \* (Dropdown menu: 1-10)
- 5**: Job Title (Text input: Product Designer 1)
- 6**: Continue (Red button)

Figure 30 Setup Workspace Professional

**3. Type of Industry:**

- Choose an industry from the **Type of Industry** dropdown.

**4. Team Size:**

- Choose your **Team Size**.

**5. Job Title:**

- Enter your **Job Title**.

**6. Finalize Creation:**

- Review your selections and click **Continue** to finish.

## Edit Workspace Details

Let's say you want to change the name and logo of your workspace, here's how you do it:

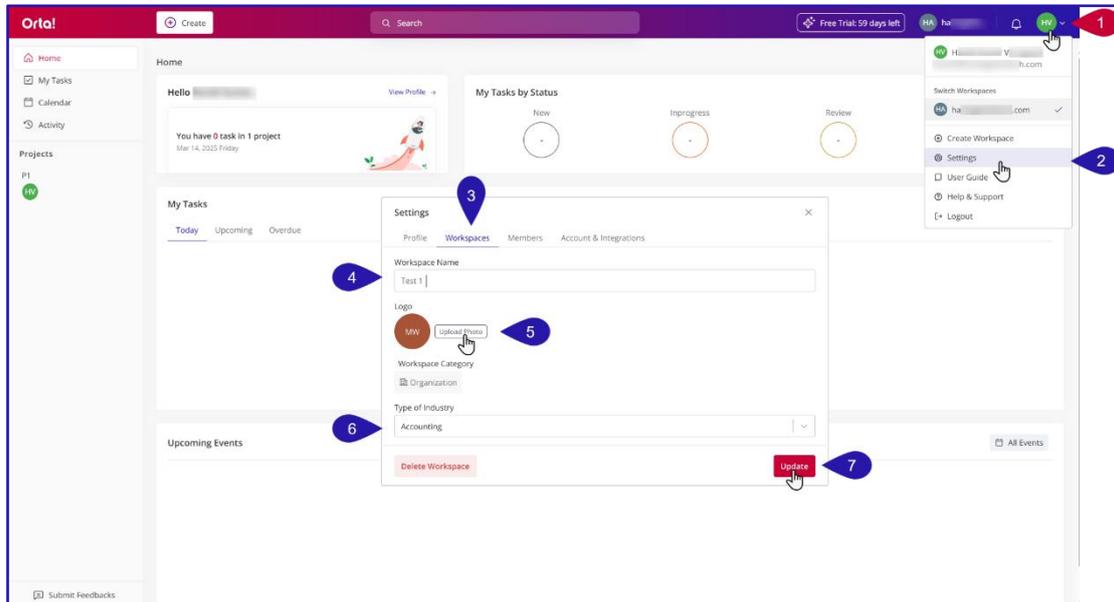


Figure 31 Edit Workspace Details

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select the **Settings** option.

### 2. Navigate to the Workspaces Tab:

- In the **Settings** dialog box, select the **Workspaces** tab.

### 3. Update the Workspace Name:

- Enter the new name in the **Workspace Name** text box.

### 4. Change the Logo:

- Click **Upload a Photo**, and then choose a new logo.

### 5. Save Changes:

- Select **Update** to save the changes.

*Note: **Workspace Owner** and **Workspace Manager** can edit workspace details. Refer to the [User Roles and Permissions Privileges](#) table for more details.*

## Remove a Workspace Member

To remove a member from the workspace:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

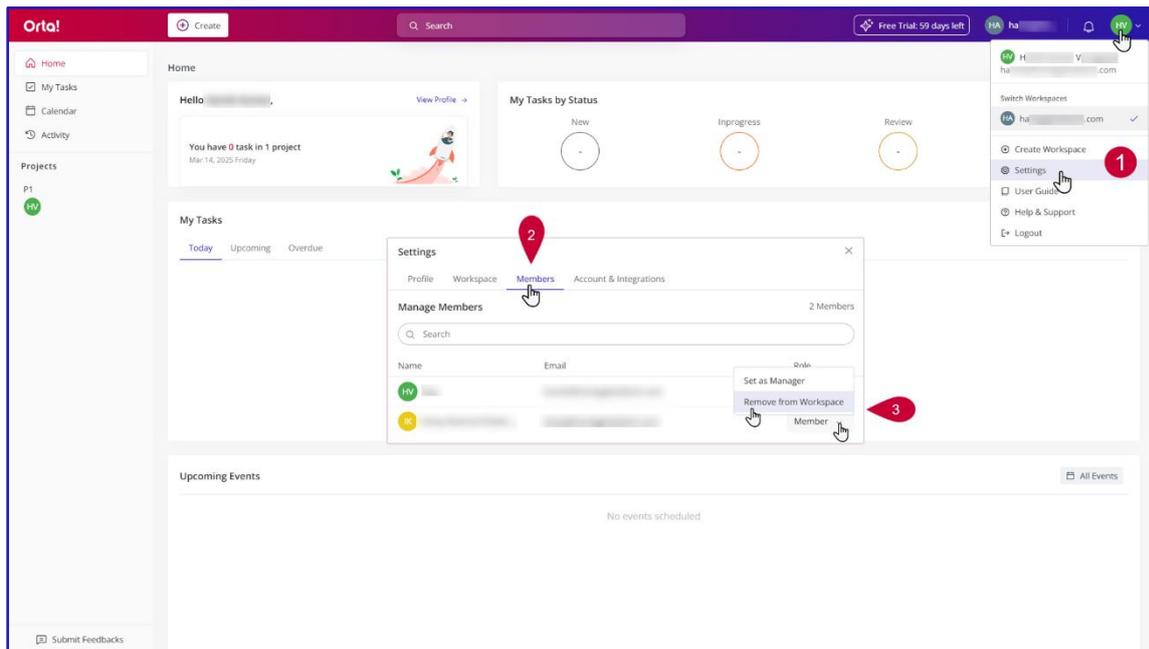


Figure 32 Remove a member from workspace

### 2. Navigate to the Members Tab

- In the **Settings** dialog box, select the **Members** tab.
- The **Members** tab displays a list of all members in the workspace and their assigned roles.

### 3. Locate the Member

- Locate the member you wish to remove and click on the **Roles** drop-down menu next to their email address.
- From the drop-down options, select **Remove from Workspace**. A confirmation pop-up will appear.

#### 4. Confirm the Action

- Click **Yes, Confirm** to finalize the removal process.

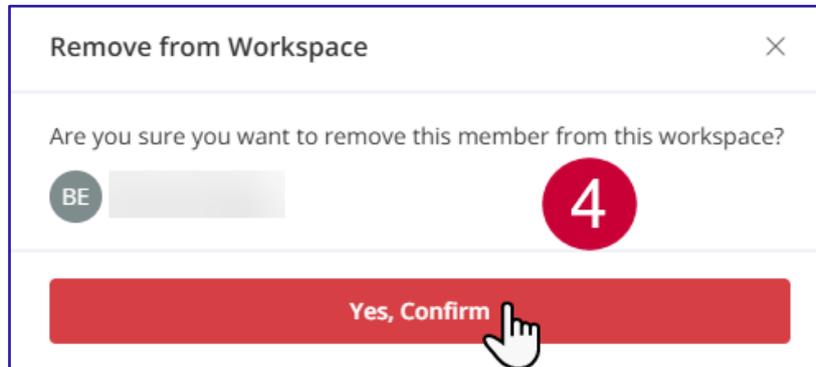


Figure 33 Confirmation

*Note: Only **Workspace Owner** and **Workspace Manager** are authorized to remove members from a workspace. For more details, refer to the [User Roles and Permissions Privileges table](#).*

## Delete a Workspace

In Orta, only the **Workspace Owner** is allowed to delete a workspace and this can only be done if there are no members in it. So, the owner must first remove all active members to ensure no one loses access to important data unexpectedly. After removing all members, proceed with the following steps:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

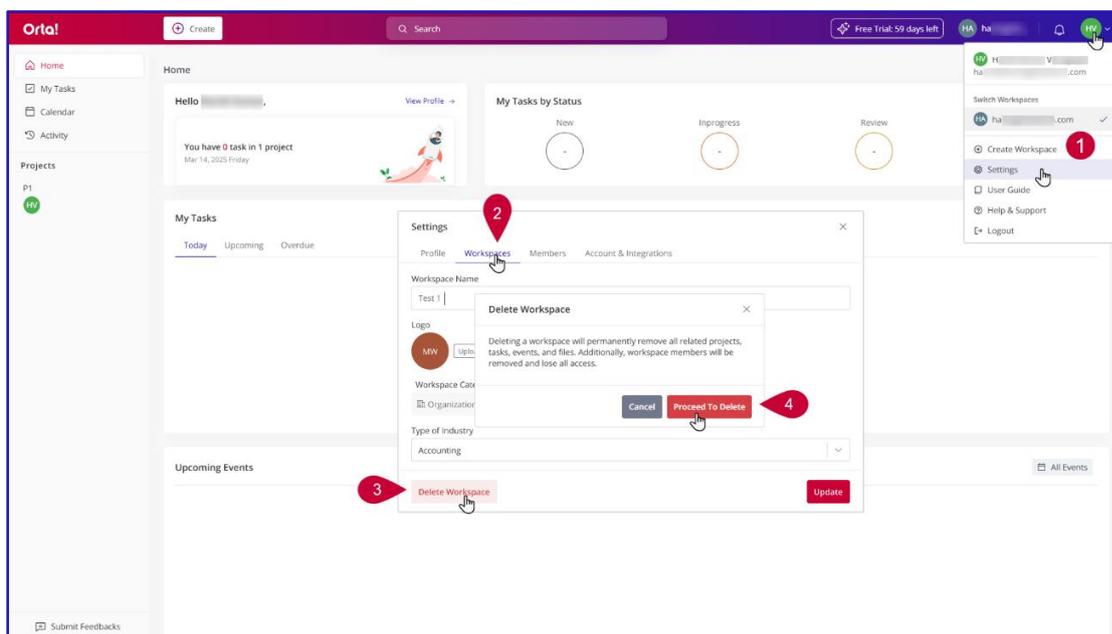


Figure 34 Delete a Workspace

### 2. Navigate to the Workspace Tab:

- In the **Settings** dialog box, select the **Workspace** tab.

### 3. Delete Workspace:

- Click the **Delete Workspace** button in the bottom.
- **Delete Workspace** confirmation popup will appear.

### 4. Confirmation one:

- Click on the **Proceed to Delete** button.
- A second confirmation will appear.

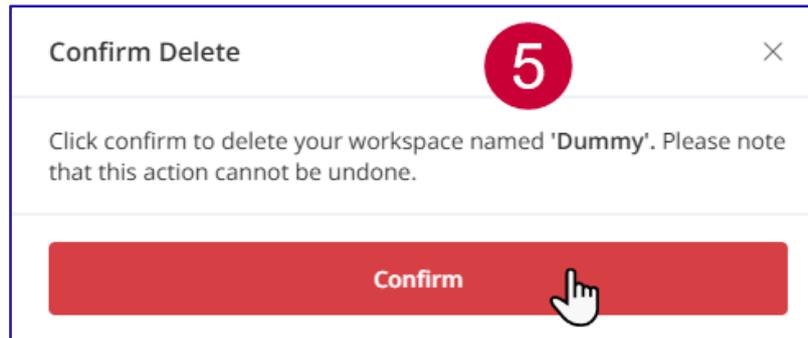


Figure 35 Confirm Delete

### 5. Confirmation Two:

- Click the **Confirm** button to complete the deletion process.
- You will be automatically redirected to the login page.

**Note:** When you delete a workspace with other members, you'll be prompted to transfer ownership to prevent data disruption. For detailed instructions, check out [Transfer Workspace Ownership](#).

## Leave a workspace

To leave a workspace:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

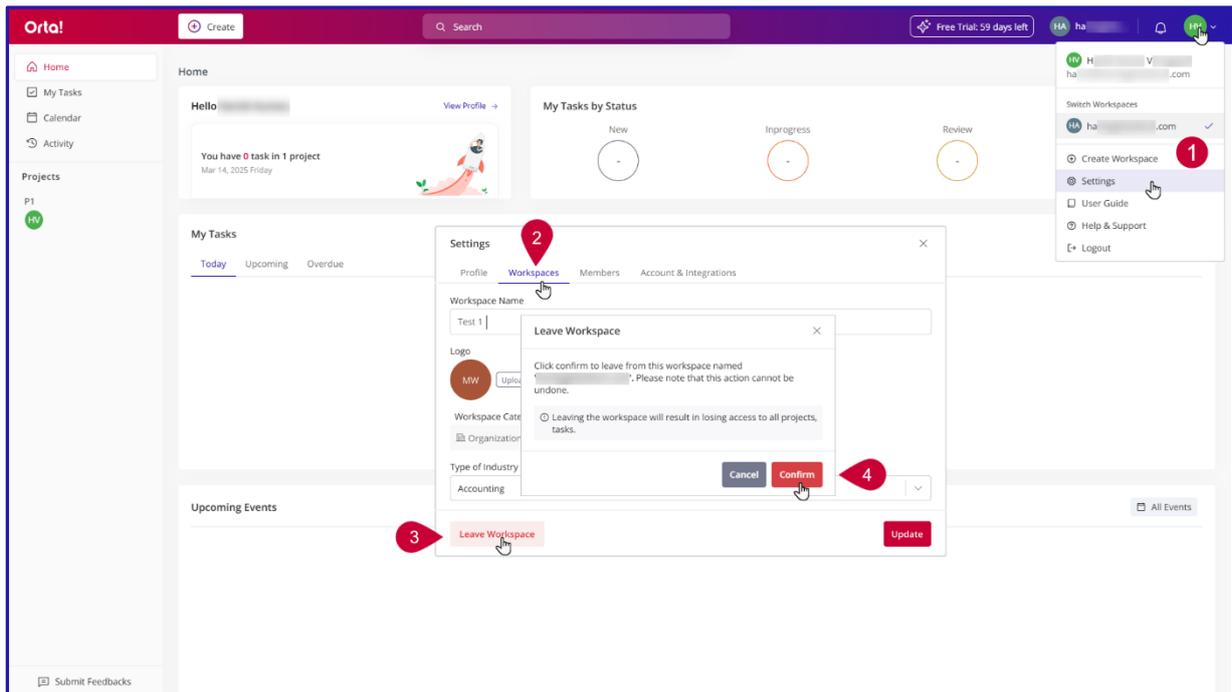


Figure 36 Leave a Workspace

### 2. Navigate to the Workspace Tab:

- In the **Settings** dialog box, select the **Workspace** tab.

### 3. Leave the Workspace:

- Click the **Leave Workspace** button at the bottom.
- A confirmation popup will appear.

### 4. Confirm Leaving:

- Click the **Leave** button in the confirmation popup to leave the workspace.

*Note: If you are a **Workspace Owner** and want to leave a workspace, you must first transfer ownership to another member. To learn how to transfer ownership, refer to [Transfer Workspace Ownership](#).*

## Set a member as Workspace Manager:

To designate a member as workspace manager, do the following:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

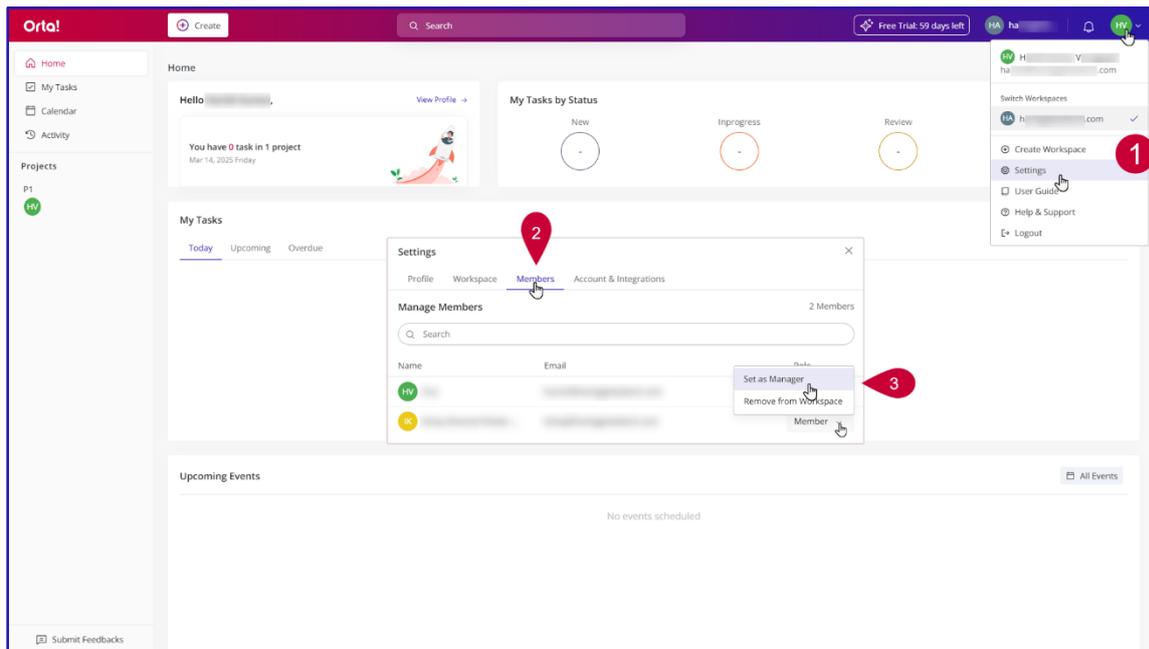


Figure 37 Set member as Workspace Manager

### 2. Navigate to the Members Tab

- In the **Settings** dialog box and select the **Members** tab.
- The **Members** tab displays a list of all members in the workspace and their assigned roles.

### 3. Locate the Member

- Locate the member you wish to upgrade and click on the **Roles** drop-down menu next to their email address.
- From the drop-down options, select **Set as Manager**. A confirmation pop-up will appear.

#### 4. Confirm the Action

- Click **Yes, Confirm** to finalize the process.

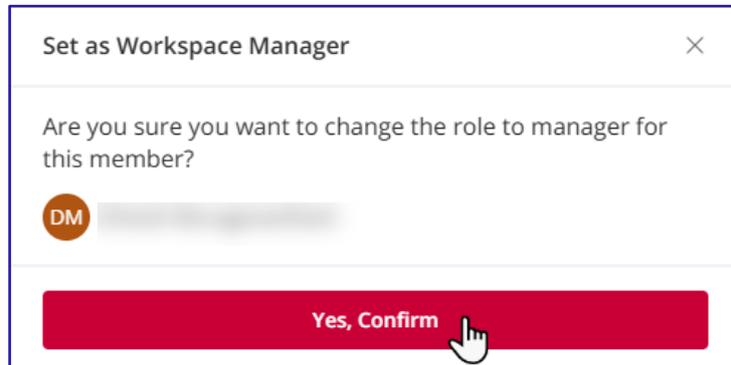


Figure 38 Confirmation

- Follow the same steps to revert a **Project Manager** to a regular member.

*Note: Only the **Workspace Owner** is authorized to designate a member as a **Workspace Manager** or to revert a **Workspace Manager** to a member. For more details, please refer to the [User Roles and Permissions](#) table.*

## Transfer Workspace Ownership

**Workspace Owners** can transfer ownership to another member. Here's how to do it:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

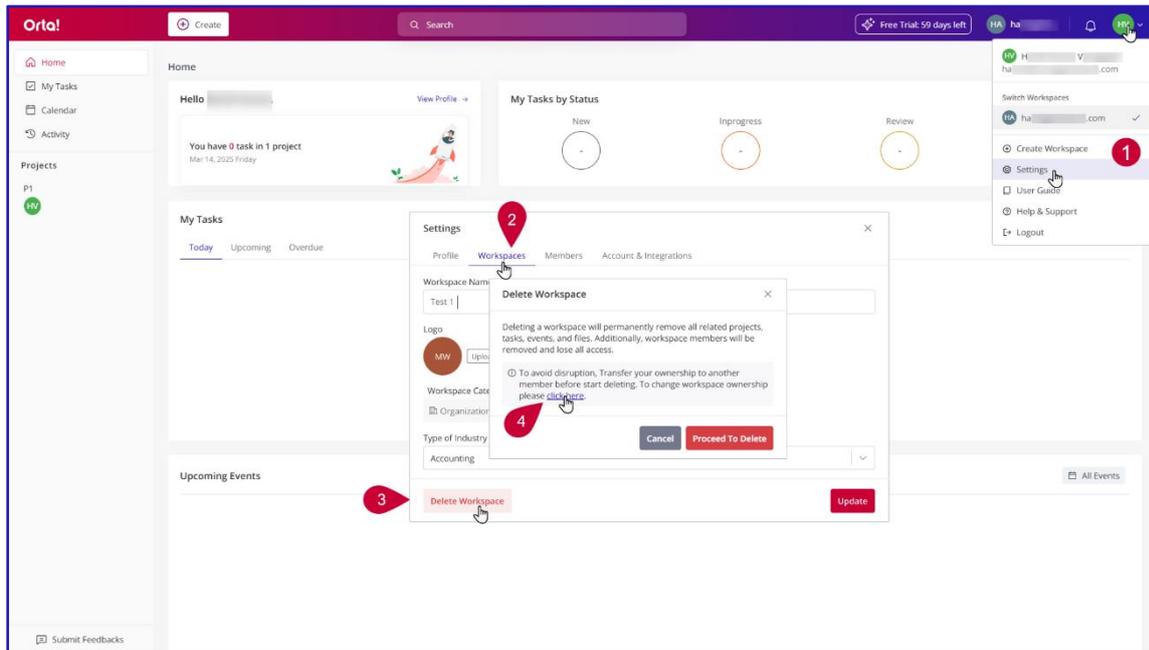


Figure 39 Transfer Ownership

### 2. Navigate to the Workspace Tab:

- In the **Settings** dialog box and select the **Workspace** tab.

### 3. Delete Workspace:

- Click the **Delete Workspace** button at the bottom of the screen.
- The **Delete Workspace** confirmation popup will appear.

### 4. Confirmation:

- In the confirmation dialog box, select **click here**.
- The **Transfer Workspace Ownership** dialog box will appear.

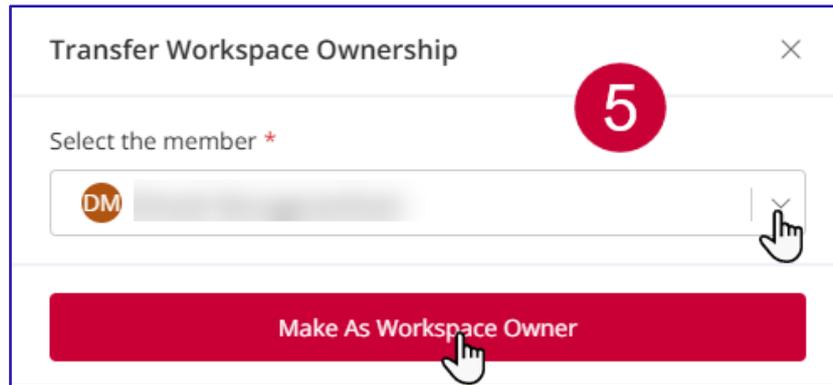


Figure 40 Transfer Workspace Ownership

### 5. Transfer Ownership:

- From the dropdown list in the dialog box, select the member to whom you want to transfer ownership.
- Click the **Make as Workspace Owner** button to complete the process.

## Project

Now that we have explored **Workspace** actions, let's look at all the key actions relevant to **Projects**. Understanding how to create and manage projects will give you better control over your tasks and help optimize your workflow. We'll jump right in.

### Create a New Project

To create a new project, do the following:

#### 1. Create:

- Click the **Create** button in the upper-right corner of the main panel.
- Select **Project** from the dropdown menu.

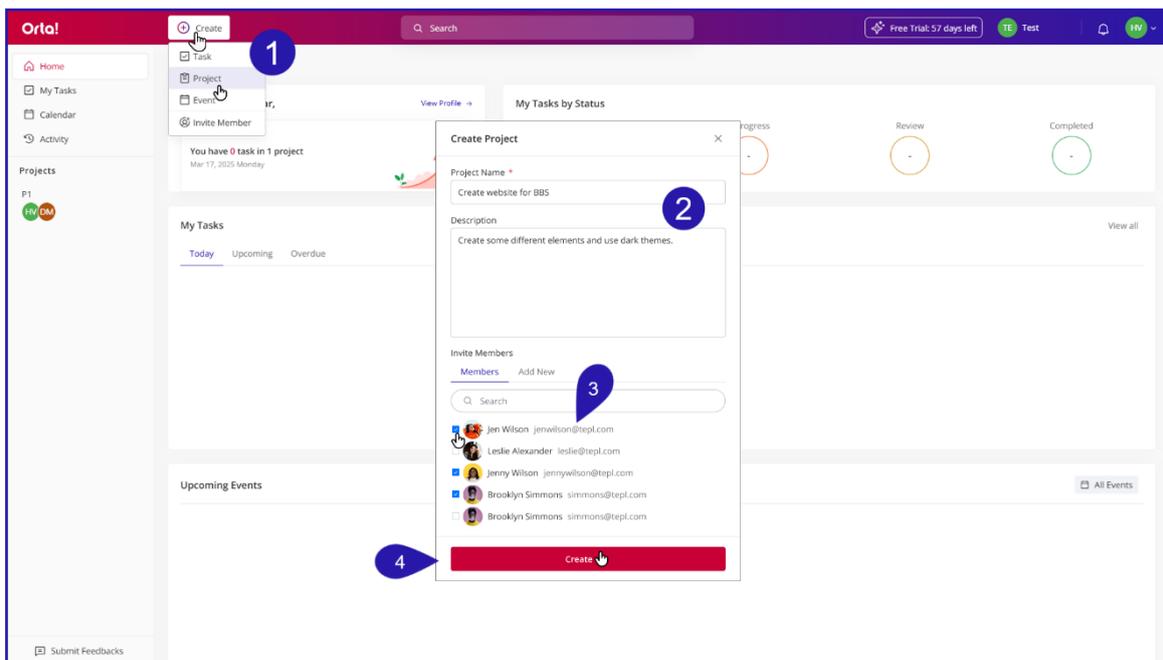


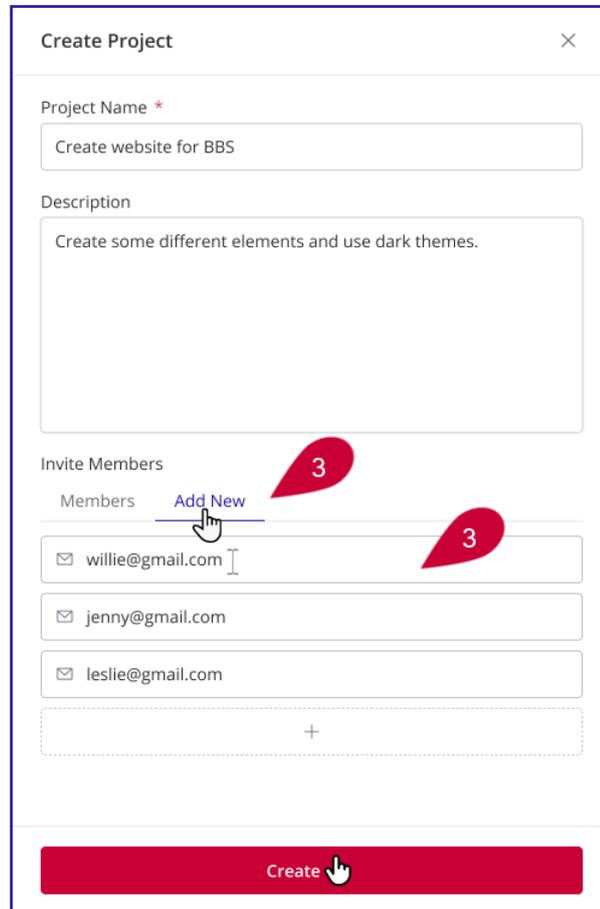
Figure 30 Create a new project

#### 2. Enter project details:

- In the **Create Project** dialog box, provide a project name and a brief description.

### 3. Invite members:

- **Existing Members:** Click and select the desired members from the provided list.



The screenshot shows a 'Create Project' dialog box with the following fields and elements:

- Project Name \***: A text input field containing 'Create website for BBS'.
- Description**: A text area containing 'Create some different elements and use dark themes.'
- Invite Members**: A section with two tabs: 'Members' and 'Add New'. The 'Add New' tab is selected and highlighted with a red callout bubble containing the number '3'.
- Members**: A list of email addresses: 'willie@gmail.com', 'jenny@gmail.com', and 'leslie@gmail.com'. A red callout bubble with the number '3' points to the 'Add New' tab.
- Input Fields**: Three text input fields for adding new members, each with a red callout bubble containing the number '3'.
- Create**: A red button at the bottom right with a hand cursor icon, indicating it is clickable.

Figure 31 Add members

- **New Members:** Click on the **Add New** tab and enter the email addresses of new members in the text boxes.

### 4. Finish creation:

- Click **Create** to finish creating the project.

*Note: Check out [User Roles and Permissions](#) to know who can create a new project in a workspace.*

## Edit Project Details

To edit project details:

### 1. Select a Project:

- Navigate to **Projects** menu in the side bar.
- Select the project to be edited.

### 2. Access Options:

- Within the project's main panel, click on the **Kebab** menu (options icon) right next to the project name.

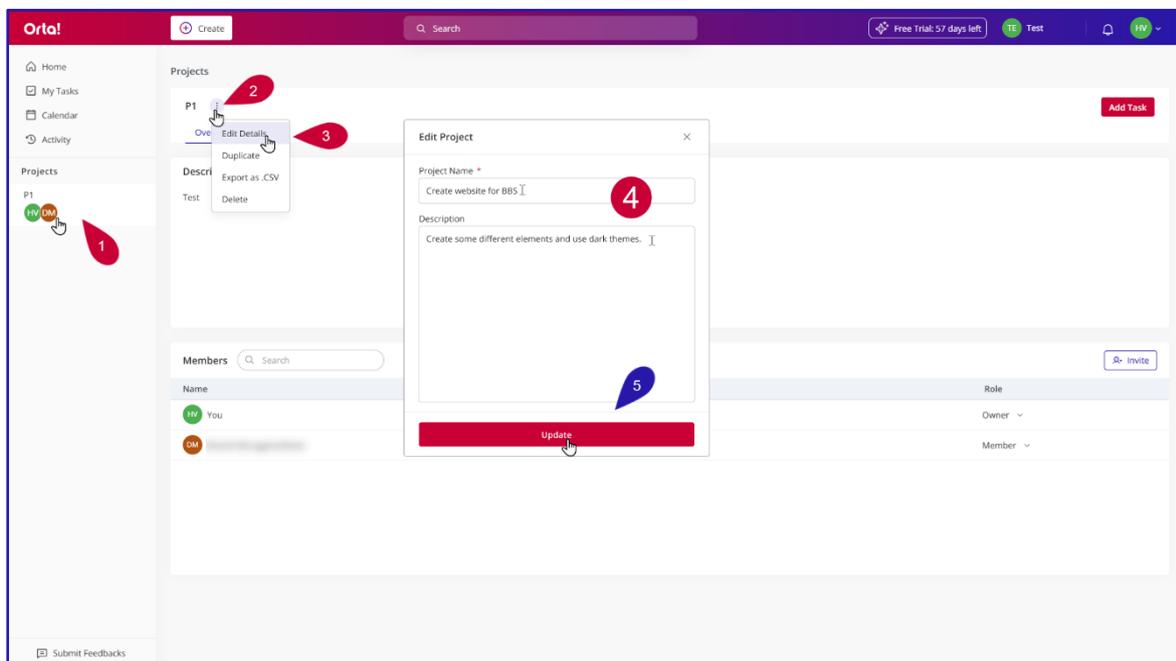


Figure 41 Edit project details

### 3. Select Edit:

- Then, in the dropdown list, select the **Edit Details** option.
- The **Edit Project** dialog box will appear.

### 4. Modify Information:

- Change the **Project Name** and **Description** as required.

5. Save Changes:

- Click **Update** to save your changes.

*Note: Check out [User Roles and Permissions](#) to know who can edit project details.*

## Duplicate a Project

To duplicate a project:

### 1. Select a Project:

- Navigate to **Projects** menu in the side bar.
- Select the project to be edited.

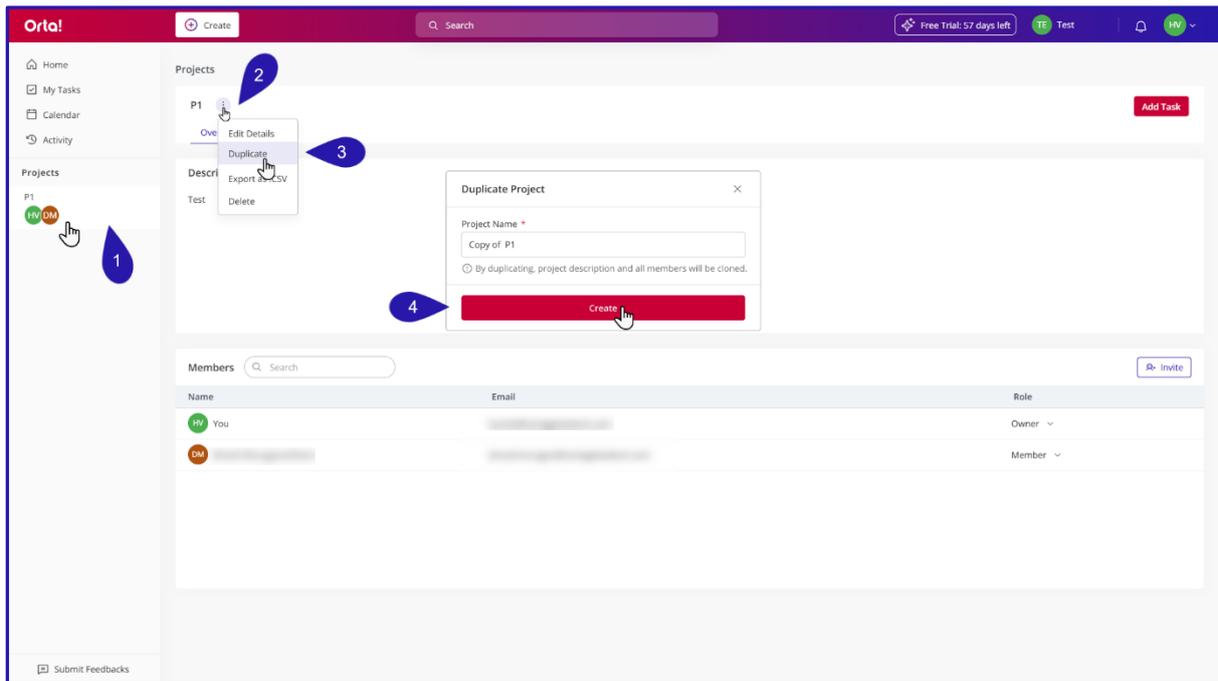


Figure 42 Duplicate a Project

### 2. Access Options:

- Within the project's main panel, click on the **Kebab** menu (options icon) right next to the project name.

### 3. Select Duplicate:

- Then, in the dropdown list, select the **Duplicate** option.
- The **Duplicate Project** dialog box will appear.

### 4. Create:

- Click **Create** to make a copy of the selected project.

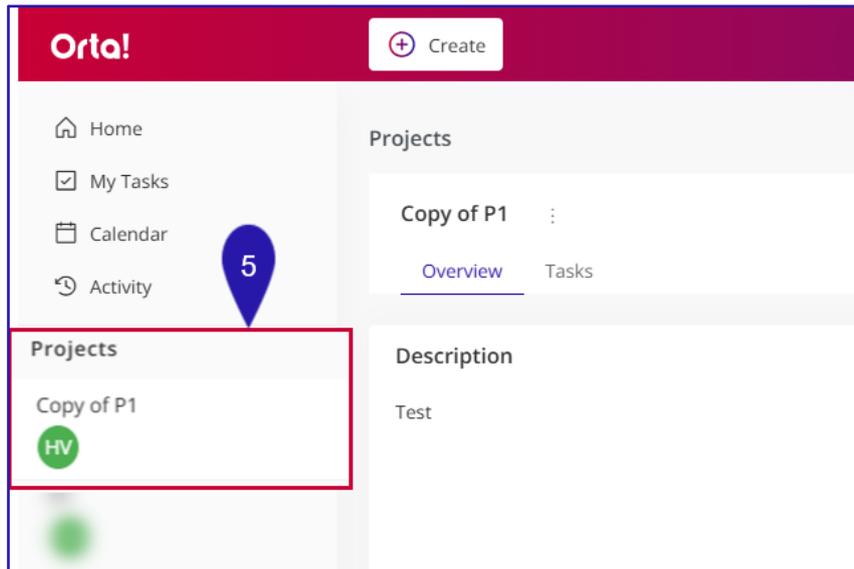


Figure 43 Copy of Project

### 5. Copy:

- The duplicated project will appear in the sidebar as **Copy of** “Project Name”.

*Note: **Workspace Owner**, **Workspace Manager**, **Project Owner**, and **Project Manager** can duplicate a project. Refer [User Roles and Permissions](#) to know more details.*

## Delete a Project

In Orta, only the **Workspace Owner** and **Project Owner** can delete a Project, and this can only be done if there are no members in it. The owner must first remove all active members to prevent unexpected loss of access to important data. Once all members are removed, proceed with the following steps:

### 1. Select a Project:

- Navigate to **Projects** menu in the side bar.
- Select the project to be edited.

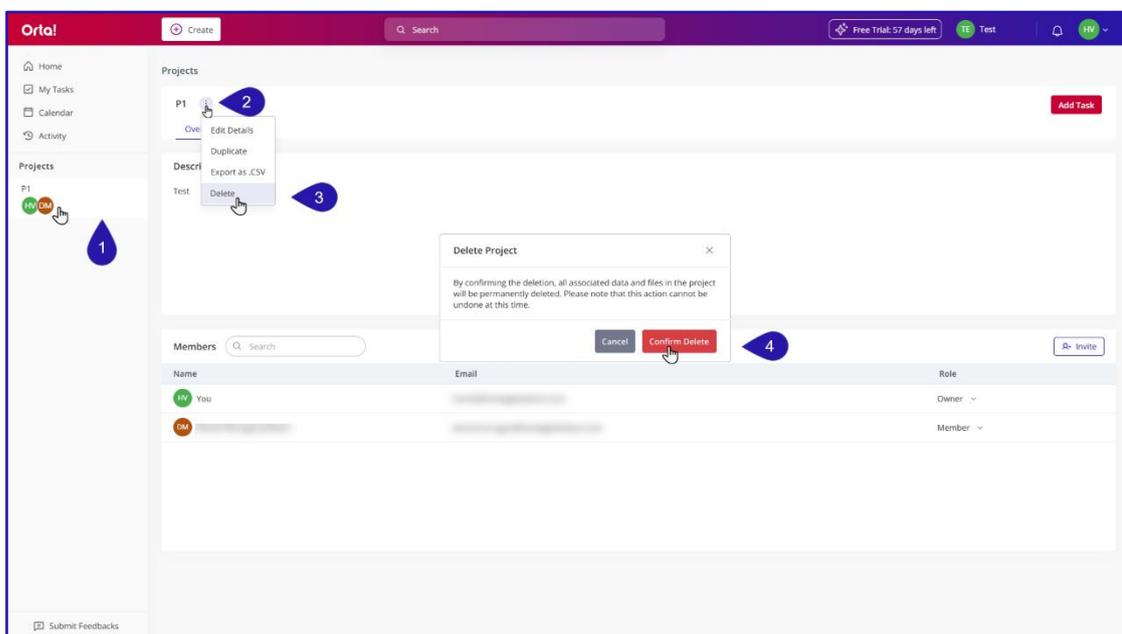


Figure 44 Delete Project

### 2. Access Options:

- Within the project's main panel, click on the **Kebab** menu (options icon) right next to the project name.

### 3. Select Delete:

- Then, in the dropdown list, select the **Delete** option.
- The **Delete Project** confirmation dialog box will appear.

### 4. Confirm Delete:

- Click **Confirm Delete** to finish deleting the project.

## Transfer Project Ownership

To transfer your project ownership to another member:

### 1. Select a Project:

- Navigate to the **Projects** menu in the sidebar.
- Select the **Project** you want to edit.

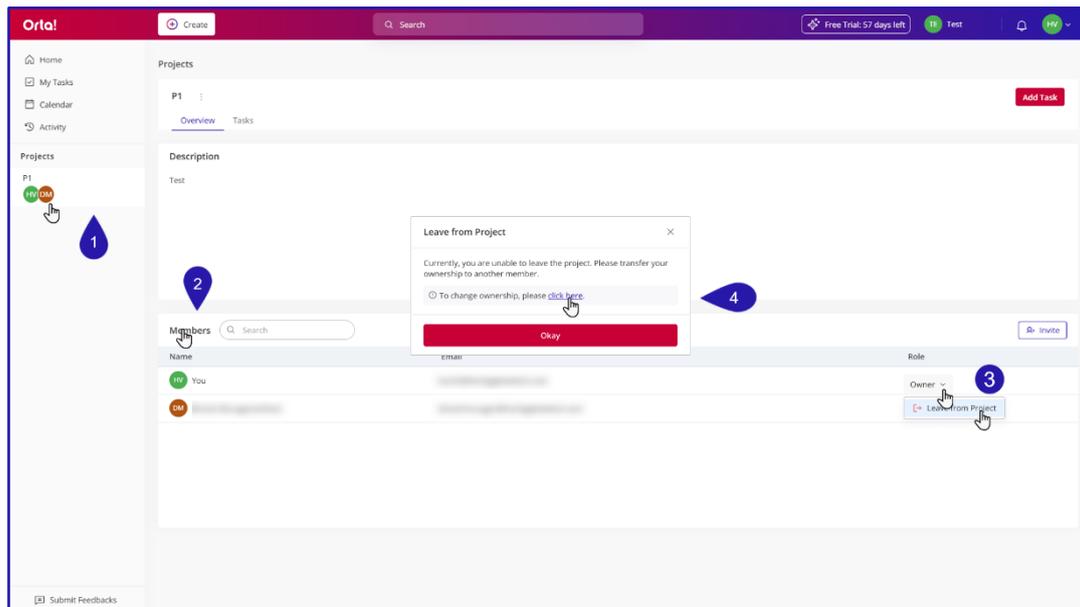


Figure 45 Transfer Ownership

### 2. Access the Members List:

- In the project menu, scroll down to the **Members** tab to view all the project members.

### 3. Initiate Ownership Transfer

- As a project owner, you cannot leave the project without first transferring ownership. This precaution prevents data loss and disruption.
- Click the role dropdown next to your name and select **Leave from Project**.

### 4. Confirm the Transfer

- **Leave from Project** dialog box will appear.
- Select **Click here** to proceed to ownership transfer.
- The **Transfer Workspace Ownership** dialog box will then appear.

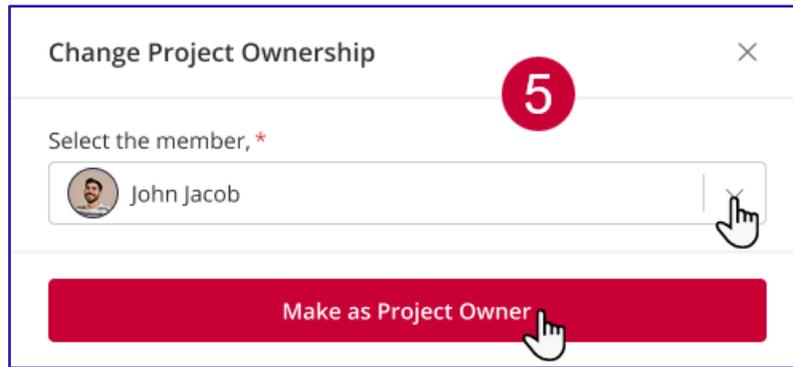


Figure 46 Make as Project Owner

## 5. Transfer Ownership

- From the dropdown list in the dialog box, choose the member to whom you want to transfer ownership.
- Click **Make as Project Owner** to complete the process.

## Set a member as Project Manager

To set a member as a Project Manager, do the following:

### 1. Select a Project:

- Navigate to the **Projects** menu in the sidebar.
- Select the **Project** you want to edit.

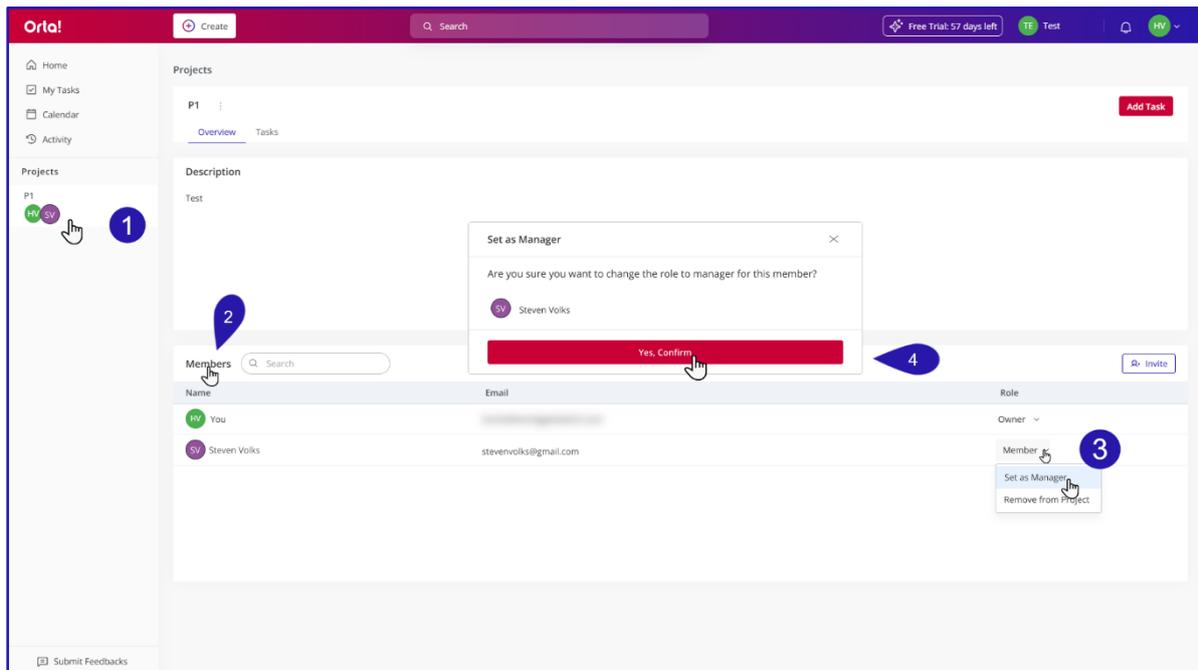


Figure 47 Set as Manager

### 2. Access the Members List:

- In the project's main panel, scroll down to the Members tab to view all the project members.

### 3. Set as Manager:

- Click on the **Role** dropdown for the member you wish to set as a manager.
- Select **Set as Manager** from the options.

#### 4. Confirm the Action

- Click **Yes, Confirm** to finalize the process.
- Follow the same steps to revert a **Project Manager** to a regular member.

*Note: Both owners - **Workspace and Project** - have the authority to designate a member as a **Project Manager** or to revert a **Project Manager** to a member. For more details, please refer to the [User Roles and Permissions](#) table.*

## Leave a Project (For manager and member)

To leave project you are part of, do the following:

### 1. Select a Project:

- Navigate to the **Projects** menu in the sidebar.
- Select the **Project** you want to edit.

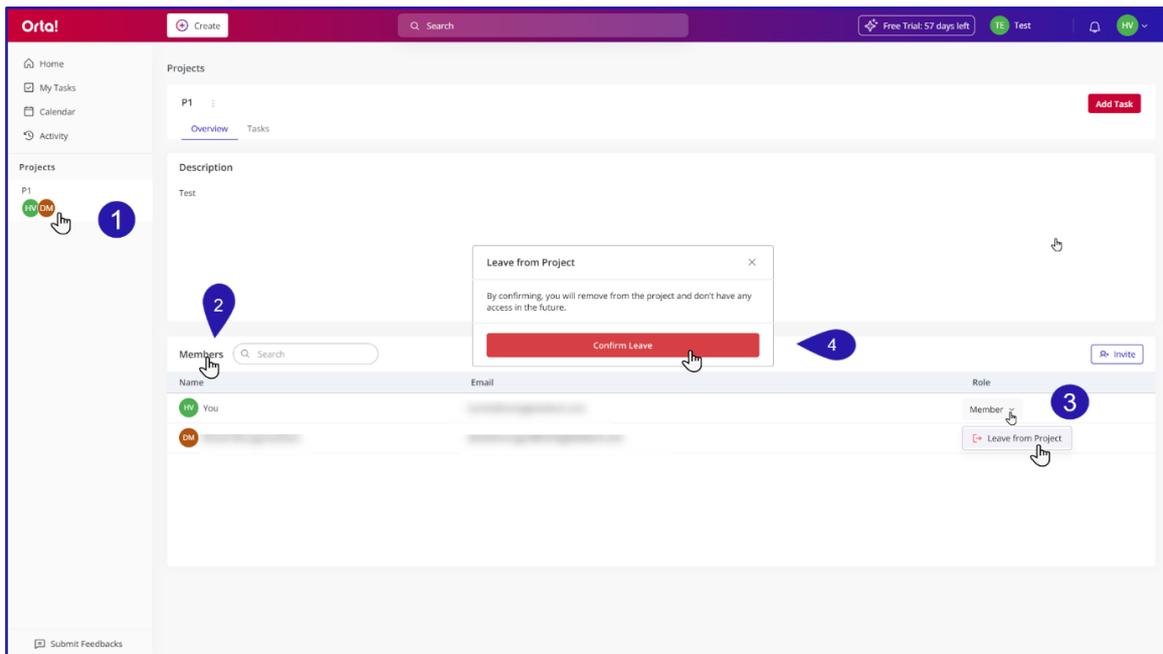


Figure 48 Leave from Project

### 2. Access the Members List:

- In the project's main panel, scroll down to the **Members** tab to view all the project members.

### 3. Leave from Project:

- Click the role dropdown next to your name and select **Leave from Project**.
- **Leave from project** dialog box appears.

### 4. Confirm the Action

- Click **Confirm Leave** to finalize the process.

*Note: If you are a project owner, you cannot leave a project without first transferring the ownership, this step prevents unexpected data loss and disruption. To learn how to transfer ownership, refer to*

## Task

Now that we have covered key Project actions, let's shift the focus to the heart of execution: **Task Management**. Tasks are the actionable building blocks of every project – mastering their creation, prioritization, and tracking will empower you to deliver results efficiently. We will start by breaking down the essentials.

### Add a New Task

To add a new task to a specific project:

#### 1. Select a Project:

- Navigate to **Projects** menu in the side bar.
- Select the specific project where you want to add a task.

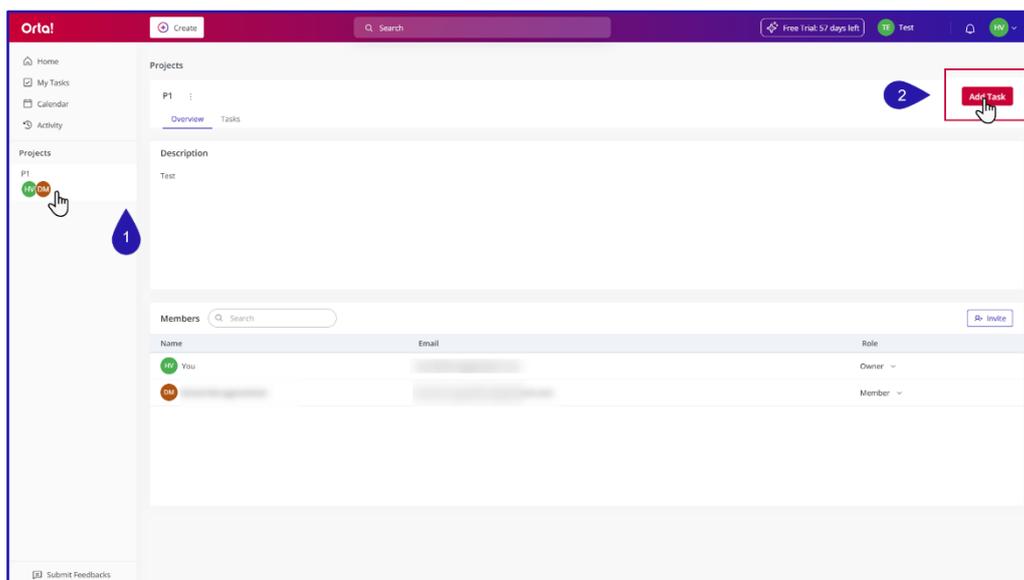


Figure 49 Add a New Task

#### 2. Open the Add Task Dialog:

- Click on the **Add Task** button located in the top-right corner of the main pane.
- The **Add Task** dialog box will appear.

The screenshot shows the 'Add Task' dialog box with the following fields and elements:

- Task Name \***: Text input field containing 'T1'.
- Project**: Dropdown menu showing 'P1' with a blue circle '3' next to it.
- Assignee**: User selection field showing 'Ha' with a blue circle '3' next to it.
- Due Date**: Date picker showing 'Mar 20, 2025'.
- Priority**: Radio button selection showing 'Low'.
- Description**: Rich text editor with a toolbar (Heading, Bold, Italic, Underline, Bulleted List, Numbered List, Link) and the text 'Test'.
- File Upload**: A dashed box containing the text 'Drop files here or click to upload' with a blue circle '4' next to it.
- Create**: A red button with the text 'Create' and a blue circle '5' next to it.

Figure 50 Add Task

### 3. Enter Task details:

- In the **Add Task** Dialog box fill all the necessary details such as **Task name**, **Project**, **Assignee**, **Due date**, **Priority** and **Description**.

### 4. Attach Files (Optional):

- Upload or drag and drop files if required.

### 5. Create the Task:

- Click **Create** to finish adding the task

## Add Multiple Assignees to a Task

In Orta, you can assign a task to multiple team members and speed up your projects.

To add multiple assignees to a task, do the following:

### 1. Select a Task:

- Navigate to **My Tasks**.
- Click the task you want to add assignees to. It will open in a pop-up dialog box.

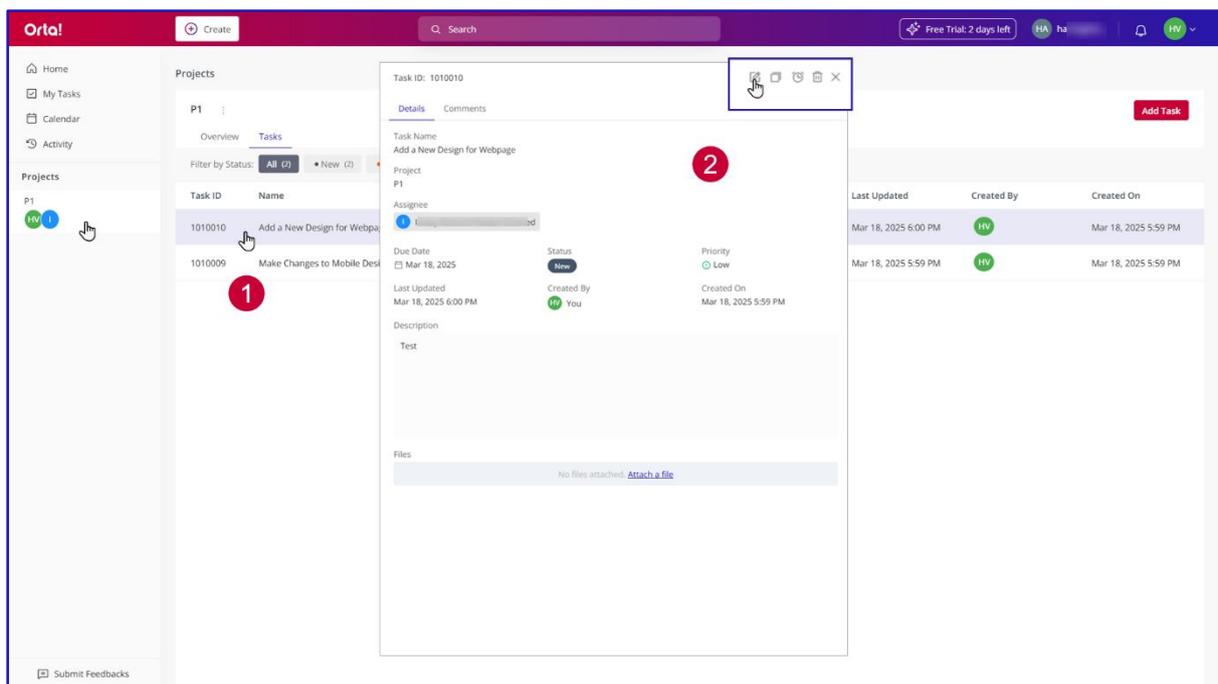


Figure 51 Select and Edit a Task

### 2. Edit the Task:

- Click the **Edit Task** icon in the upper-right corner of the dialog box.

### 3. Add or Remove Assignees:

- In the **Edit Task** dialog box, open the **Assignee** drop-down.
- Select the desired team members to assign them to the task.
- Click on the **Remove** icon (X) next to a name to remove them from the task.

The screenshot shows the 'Edit Task' interface. The 'Task Name' field contains 'Add a New Design for Webpage'. The 'Project' is set to 'P1'. The 'Assignee' dropdown menu is open, showing a list of users with 'Bessie Cooper' selected. A red circle with the number '3' is placed over the dropdown menu. Below the dropdown, the 'Due Date' is set to 'tech.com', the 'Priority' is 'Low', and the 'Status' is 'New'. The 'Description' field contains the text 'Test'. At the bottom of the form, there is a red 'Update' button. A blue circle with the number '4' is placed over the 'Update' button. A dashed box with the text 'Drop files here or click to upload.' is located above the 'Update' button.

Figure 52 Add Assignee

#### 4. Update:

- Click **Update** to save the changes.

*Note: Anyone with the **Edit Any Task Details** privilege can add or remove Assignees to a task. Task Creators and Assignees are limited to editing their own tasks. For a detailed breakdown, refer to the [User Roles and Permissions](#) table*

## Change the Priority of a Task:

Let's say your manager has asked you to prioritize finishing the content for the Mobile Design as soon as possible. Here's how you can update its priority:

### 1. Edit Task:

- Open the **Edit Task** dialog box.
- Click on the **Priority** drop-down menu.
- Select the appropriate priority level, such as High.

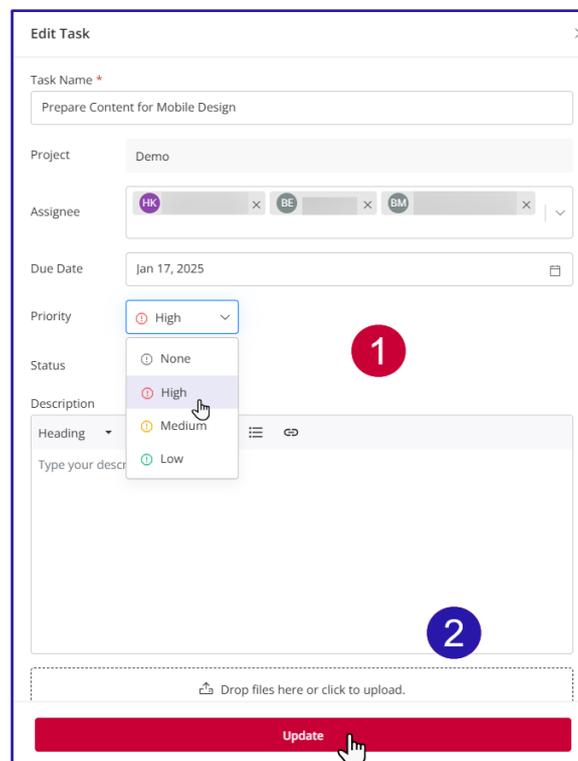


Figure 53 Change Priority

### 2. Update:

- Click **Update** to save the changes.

*Note: Anyone with the **Edit Any Task** privilege can modify the priority of a task. Task Creators and Assignees are limited to editing their own tasks. For a detailed breakdown, refer to the [User Roles and Permissions](#) table*

## Comment

Use task comments in Orta to boost team communication and keep everyone aligned. With the comments section, you can share updates, clarify details, and ensure everyone stays on the same page.

### Add a Comment

To start conversing in comments section:

#### 1. Select a Task:

- Go to **My Tasks**.
- Choose the task you want to comment on. It will open in a pop-up dialog box.

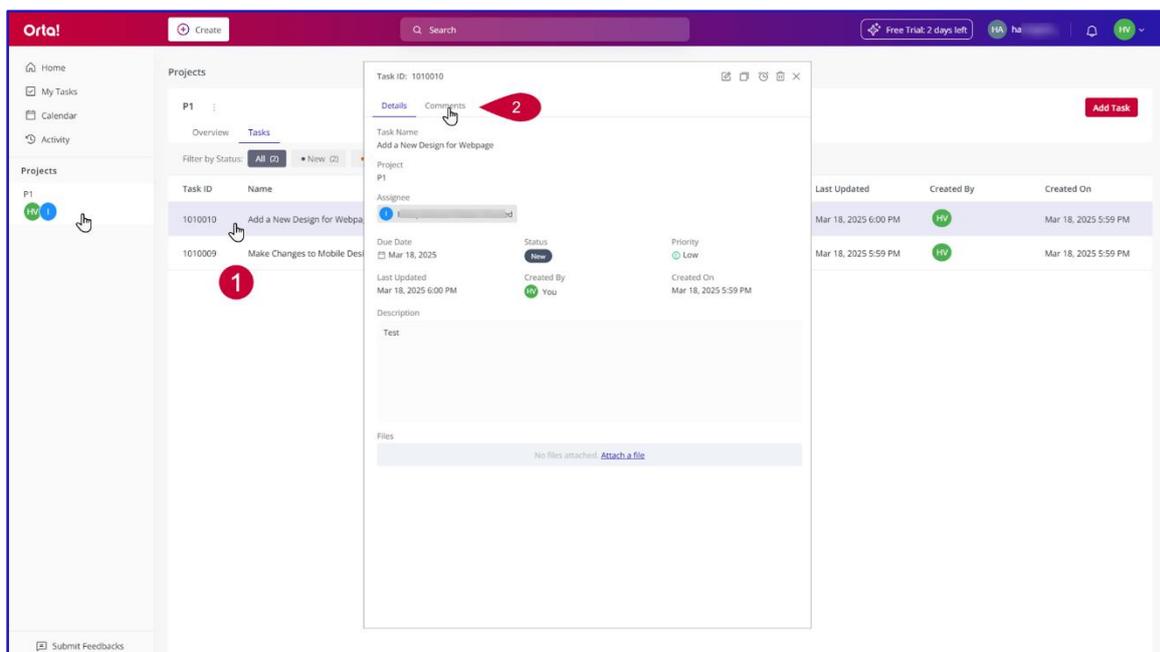


Figure 24 Comments Tab

#### 2. Comments tab:

- Select the comments tab.

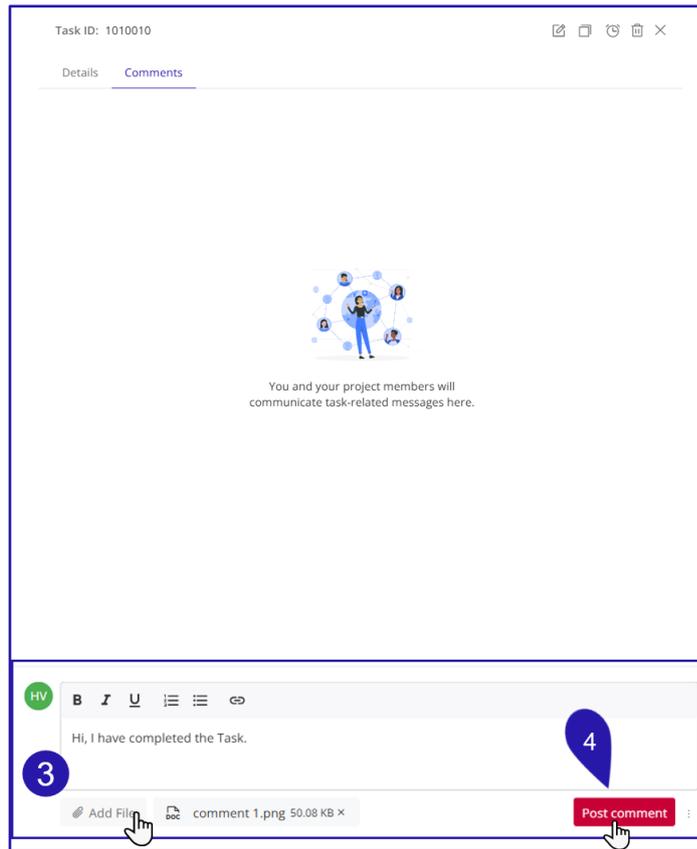


Figure 25 Post Comment

### 3. Enter message:

- Type your message in the **Comments** text box.
- Click **Add File** to attach a file if needed.

### 4. Post comment:

- Click **Post Comment** to share it with your team

## Edit a Comment

Follow these steps to edit a comment:

### 1. Select a Task:

- Navigate to **My Tasks**.
- Choose the task from which you wish to edit a comment. The task will open in a dialog box.

### 2. Comments Tab:

- Select the **Comments** tab.

### 3. Initiate Edit Comment

- Hover over any comment to reveal the **Edit** and **Delete** icons.
- Click the **Edit** icon to open the comment box.

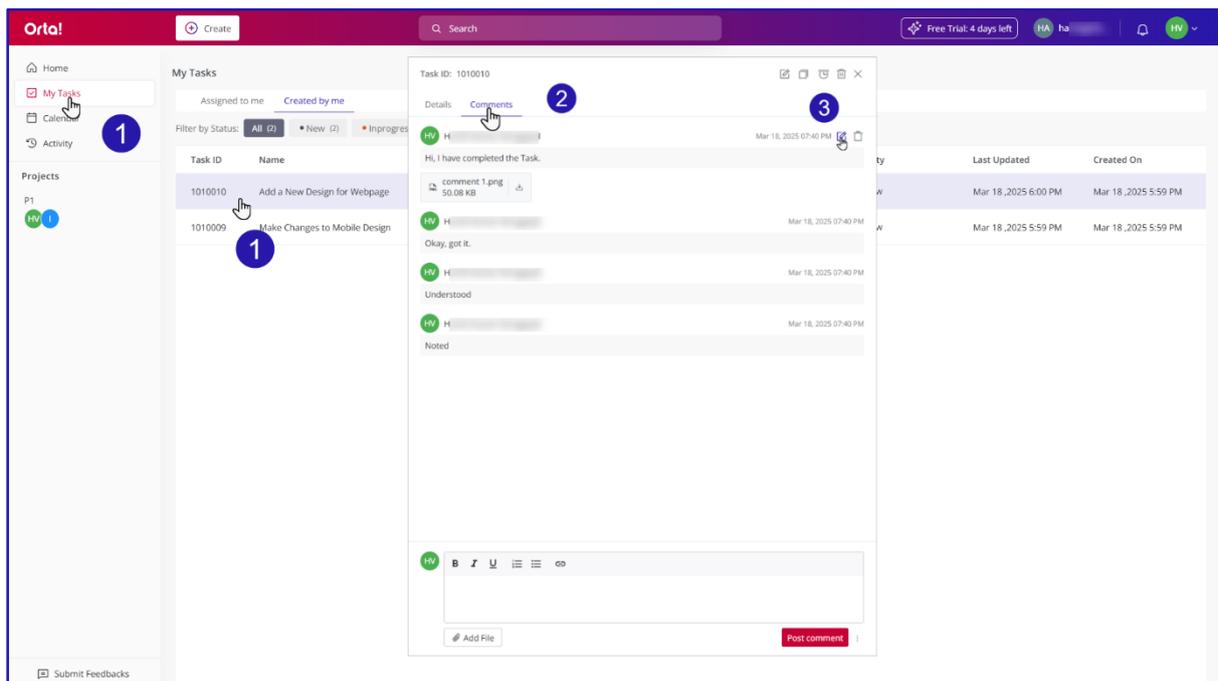


Figure 54 Edit Icon

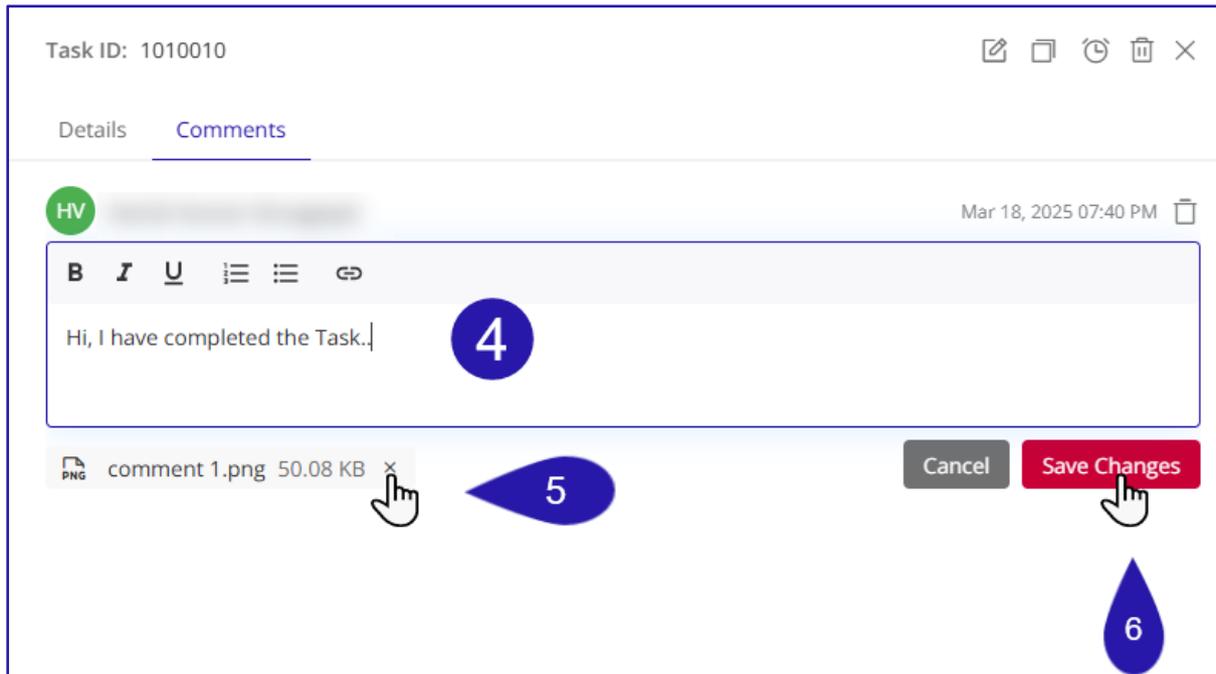


Figure 55 Edit Comment

#### 4. Edit the Comment

- Enter your new message in the **Comment** box.

#### 5. Remove the Attached File (if needed)

- Click the **Remove** icon next to the attached file to delete it.

#### 6. Save Your Changes

- Click **Save Changes** to update the comment.

*Note: You cannot save changes unless you have either edited the comment or removed the attached file. If neither action is performed, only the cancel option is available.*

## Delete a Comment

Follow these steps to delete a comment:

### 1. Select a Task:

- Navigate to **My Tasks**.
- Choose the task from which you wish to delete a comment. The task will open in a pop-up dialog box.

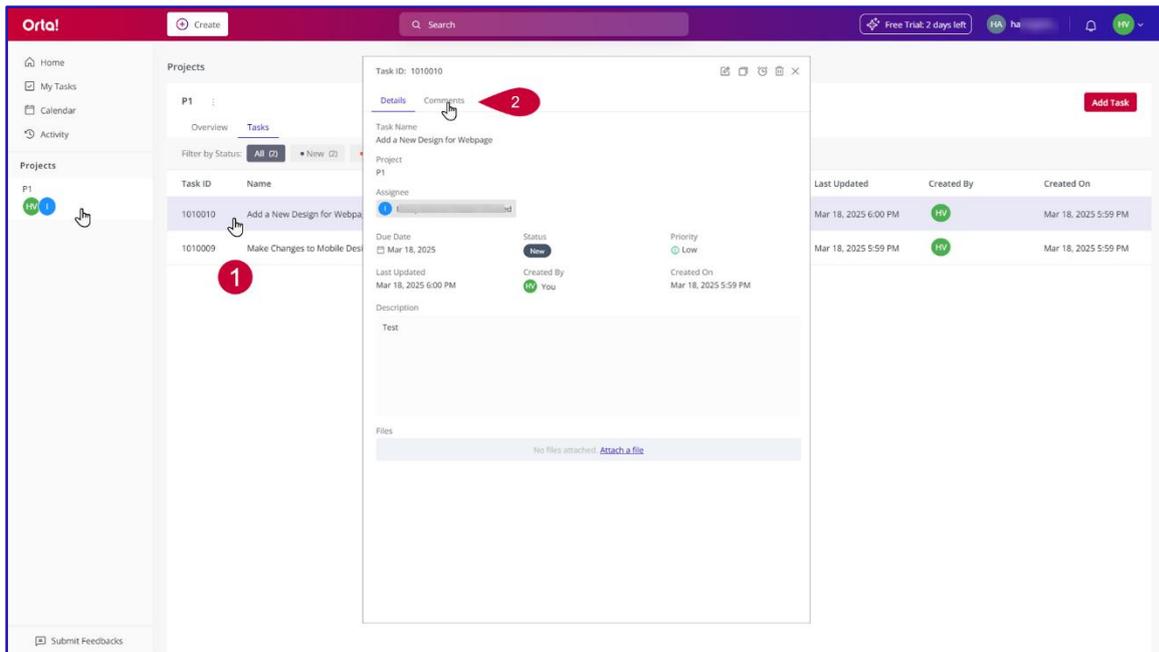


Figure 24 Comments Tab

### 2. Comments Tab:

- Select the **Comments** tab.

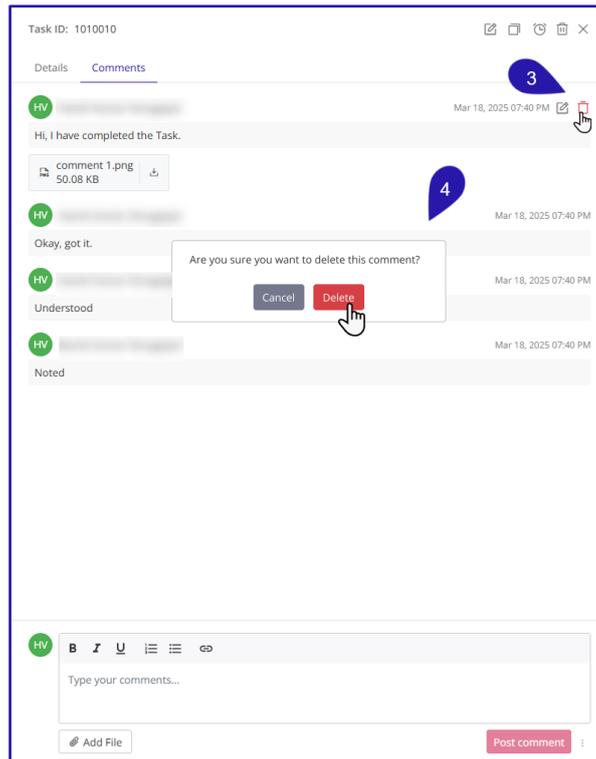


Figure 56 Delete a Comment.

### 3. Initiate Delete

- Hover over any comment to reveal the **Delete** icon.
- Click the **Delete** icon to open the confirmation dialog box.

### 4. Delete Confirmation

- Click **Delete** in the dialog box to remove the comment.

## Delete a Task

To delete a Task:

### 1. Select a Task:

- Navigate to **My Tasks**.
- Click the task you want to delete. It will open in a pop-up dialog box.

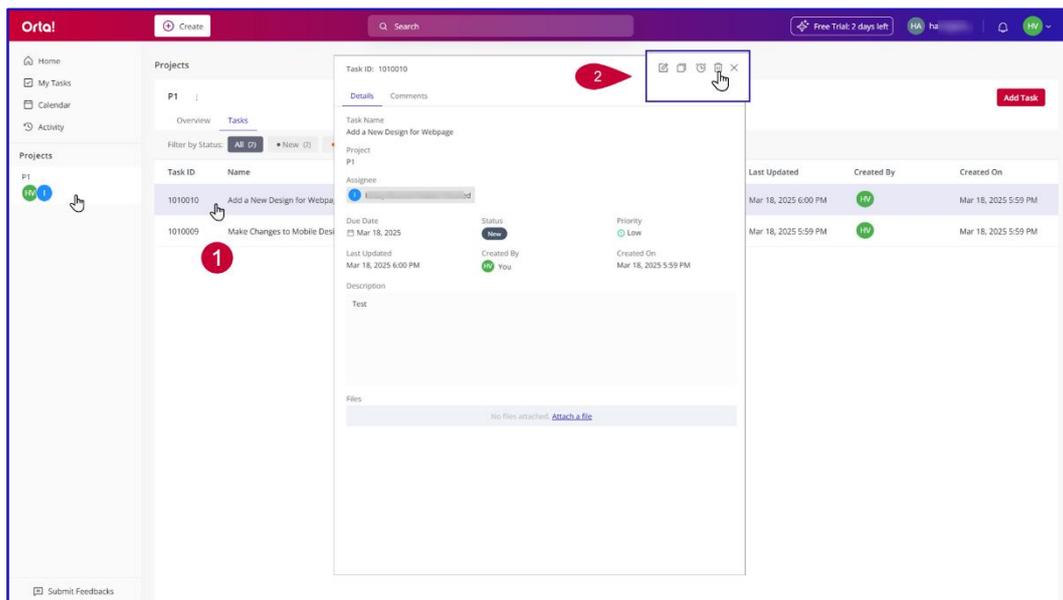


Figure 57 Delete a task

### 2. Delete:

- Click the **Delete** icon in the upper-right corner of the dialog box.

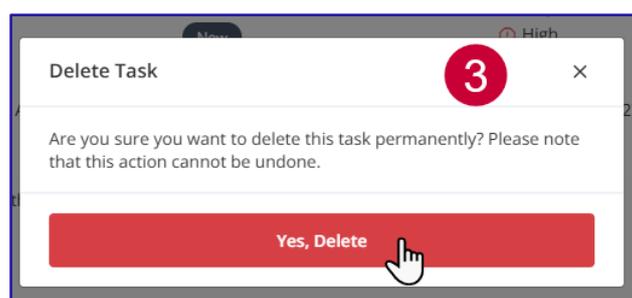


Figure 58 Confirm Delete

### 3. Confirm:

- Click **Yes, Delete** to confirm.

*Note: Anyone with the **Delete Any Task** privilege can delete a task. Task Creators are limited to deleting their own task. Refer to the [User Roles and Permissions](#) Privileges table for more details.*

## Duplicate a Task

For tasks that repeat regularly, you can use the **Duplicate Task** feature to save time. It lets you easily create new tasks with the same details, ensuring consistency and making it easier to manage multiple tasks.

To duplicate a Task:

### 1. Select a Task:

- Navigate to **My Tasks**.
- Click the task you want to duplicate. It will open in a pop-up dialog box.

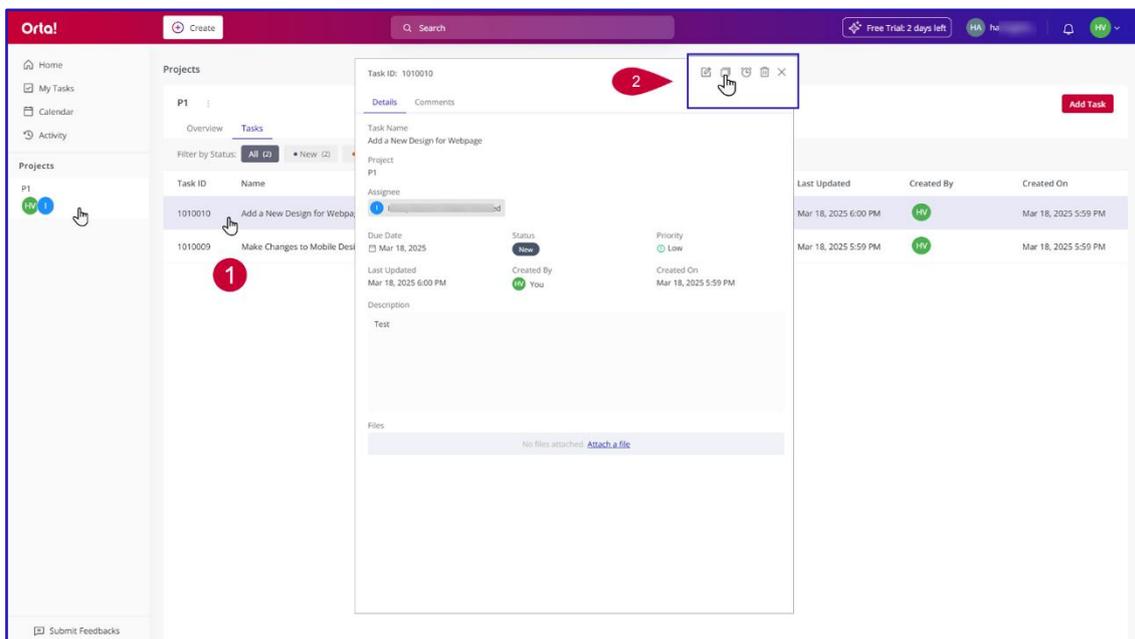


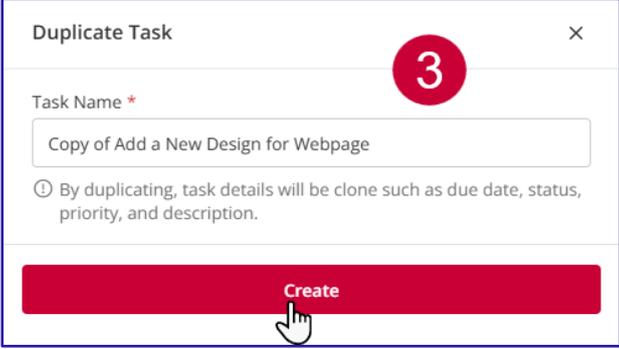
Figure 59 Duplicate a Task

### 2. Duplicate:

- Click the **Duplicate** icon in the upper-right corner of the dialog box.

### 3. Create:

- In the **Duplicate Task** dialog, type the desired name in the **Task Name** box.
- Click **Create** to complete the task duplication.



Duplicate Task

Task Name \*

Copy of Add a New Design for Webpage

By duplicating, task details will be clone such as due date, status, priority, and description.

Create

Figure 60 Create a Copy

*Note: Anyone with the **Duplicate Any Task** privilege can duplicate a task. Task Creators and Assignees are limited to duplicating their own task. Refer to the [User Roles and Permissions](#) table for more details.*

## Task reminder

Stay on top of your tasks with our task reminder feature in Orta. Set reminders to ensure important deadlines are never missed and manage your responsibilities more efficiently.

To set a reminder for a task, follow these steps:

### 1. Navigate to My Tasks:

- Open **My Tasks** from the sidebar.
- Click on the desired task from the list to set a reminder for it.
- A dialog box will appear.

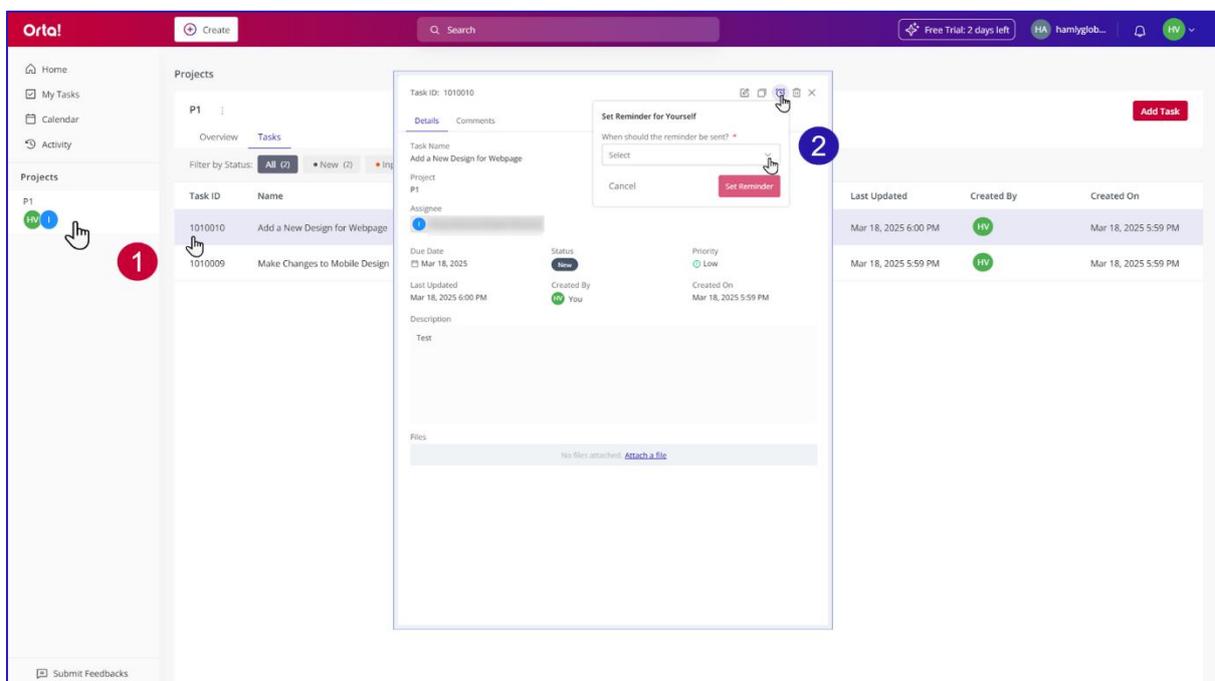


Figure 61 Set a Reminder

### 2. Set Time and Date:

- In the dialog box, click on the **reminder icon**.
- The **Set Reminder for Yourself** form will appear.
- Within the form, click on the dropdown menu.

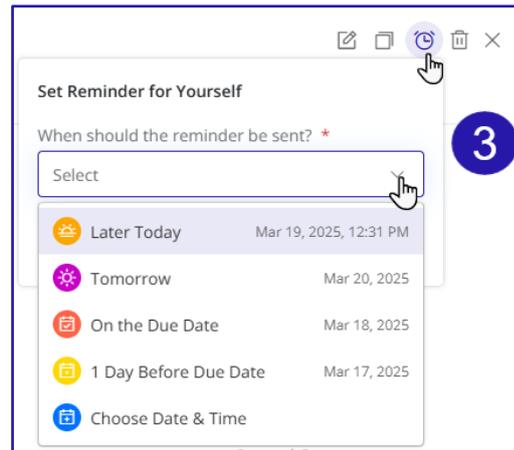


Figure 62 Reminder Options

### 3. Reminder Options:

- **Later today:** The reminder will be set 2 hours after the current time on the same day.
- **Tomorrow:** The reminder will be set for 9:00 AM on the next day. You can adjust the time if necessary.
- **On the due date:** The reminder will be set 2 hours after the current time on the task's due date. Adjustments to the time can be made if needed.
- **1 day before the due date:** The reminder will be set 2 hours after the current time, 1 day before the task's due date. The time can be modified as required.
- **Choose date & time:** Manually select a specific date and time for your reminder.

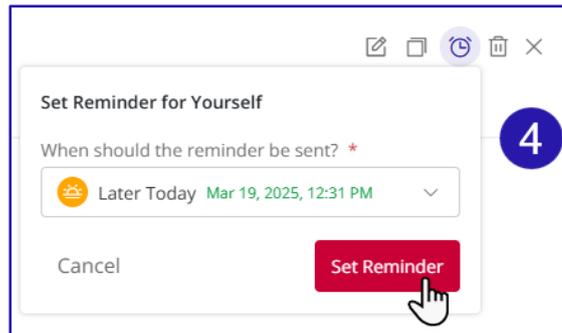


Figure 63 Set Reminder

#### 4. Finalize the Reminder:

- Choose any of the options and then click on the **Set Reminder** button to finish the process.

#### 5. Delete a Reminder

- Open the reminder drop-down for the required task.
- Click the **Delete** button.

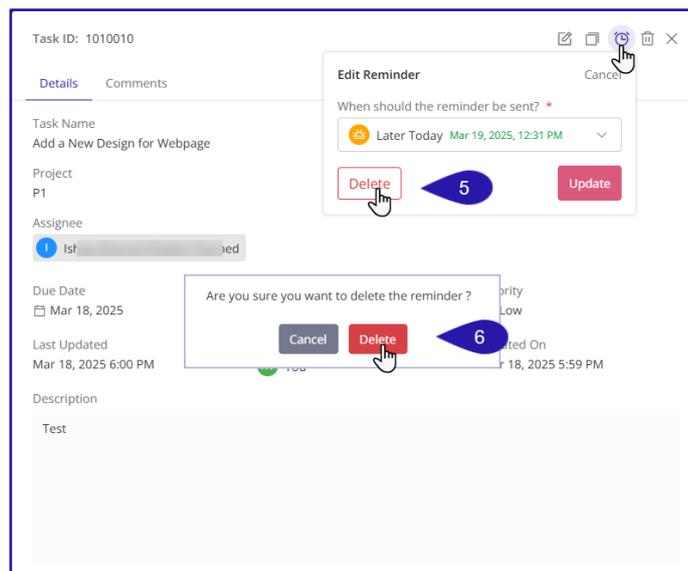


Figure 64 Delete a Reminder

#### 6. Confirm

- In the confirmation dialog box, Click **Delete** to remove an existing reminder.

## Calendar

Having discussed task management, we'll now turn to Calendar feature in Orta. By using event creation and Google Calendar synchronization, you can maintain deadlines, keep priorities organized, and foster smooth collaboration.

Let's look at key actions relevant to Calendar to simplify scheduling:

### Add an Event

To add an event to your calendar, do the following:

#### 1. Navigate to the Calendar

- Click on the **Calendar** menu in the **Sidebar**.
- The **Calendar** main panel will open.

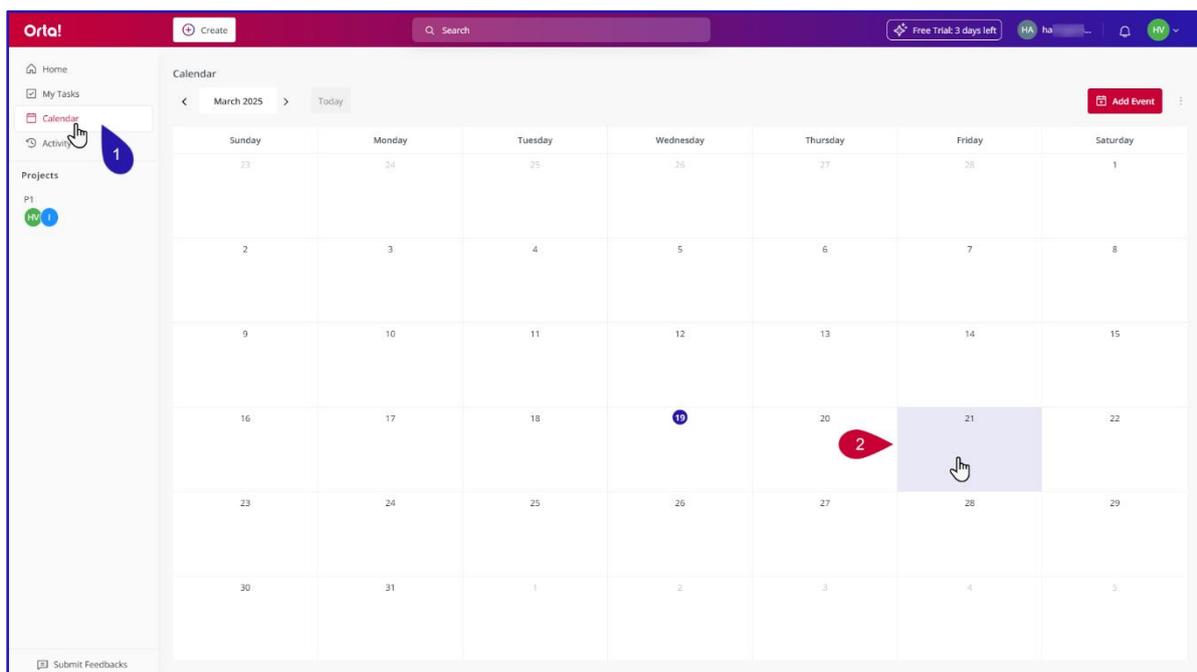


Figure 65 Add an Event

#### 2. Choose a Date

- Click on the date where you want to add an event.
- The **Add Event** dialog box will appear.

### 3. Add Event details:

In the **Add Event** dialog box, fill in the following fields:

- **Event Name:** Enter a descriptive name for the event in the text box at the top.
- **Date and Time:**
  - Set the event's start and end dates in the date selector fields.
  - Choose the start and end times using the time selectors.
  - If the event lasts all day, select the **All Day** checkbox.
- **Repeat Settings:**
  - If the event repeats, choose the recurrence frequency from the dropdown (e.g., **Daily**)
  - Specify whether the recurrence ends on a specific date or continues indefinitely by selecting **Never Ends** or **Ends on** and providing a date.

The screenshot shows the 'Add Event' dialog box with the following fields and callouts:

- 1. Event Name: Event 1
- 2. Date and Time: Mar 21, 2025 - Mar 21, 2025, 11:30 AM to 12:00 PM
- 3. Recurrence Frequency: Daily
- 4. Add Participants: Add Participants
- 5. Location: Texas
- 6. Description: Test Event
- 7. Attach file: Attach file
- 8. Cancel/Create buttons: Cancel, Create

Figure 66 Event Details

#### 4. Add Participants:

- In the **Add Participants** field, search for and select required participants from the list.

#### 5. Location:

- Click on **Add Location** button and specify the location of the event in the provided field (e.g. Texas).

#### 6. Add Description:

- In the text box at the bottom, enter additional details or a description for the event.
- Use the formatting toolbar (bold, italic, bulleted list, etc.) as needed.

#### 7. Attach File

- Click the **Attach File** button if you need to include a file.

#### 8. Save the Event:

- Once all details are filled, click **Create** to save the event.
- To cancel the process, select **Cancel**.

## Edit an event

To edit an event:

### 1. Select the Event:

- Click on the desired event in the calendar.

### 2. Open the Edit Dialog:

- In the dialog box that appears, click on the **Edit** icon to open the **Edit Event** dialog box.

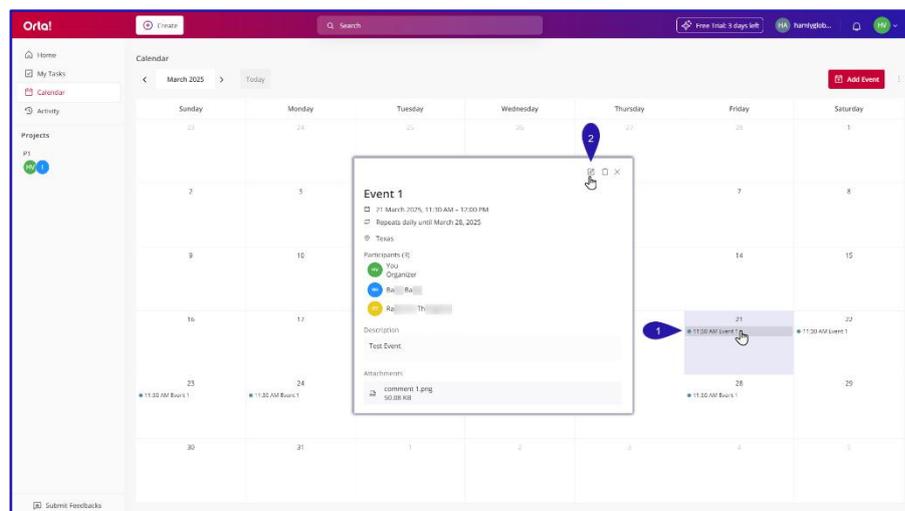


Figure 67 Edit an Event

### 3. Modify Event Details:

- Click on the **x** icon next to any participant name to remove them from the event.
- Add more to description if needed – modify the event as required.

**Edit Event**

Event 1

Mar 21, 2025 – Mar 21, 2025 11:30 AM to 12:00 PM

All day

Daily

Never Ends  Ends on Mar 28, 2025

Add Participants

Ha... Ve... Organizer

Ra... Th... an

Texas

**B I U** | | | | |

Test Event - Edit Event

Cancel Update

Figure 68 Edit event

#### 4. Save Your Changes:

- Click the **Update** button to save your edits.

## Delete an event

### 1. Select the Event:

- Click on the desired event in the calendar.

### 2. Open the Edit Dialog:

- In the dialog box that appears, click on the **Delete** icon.
- A confirmation dialog box appears.

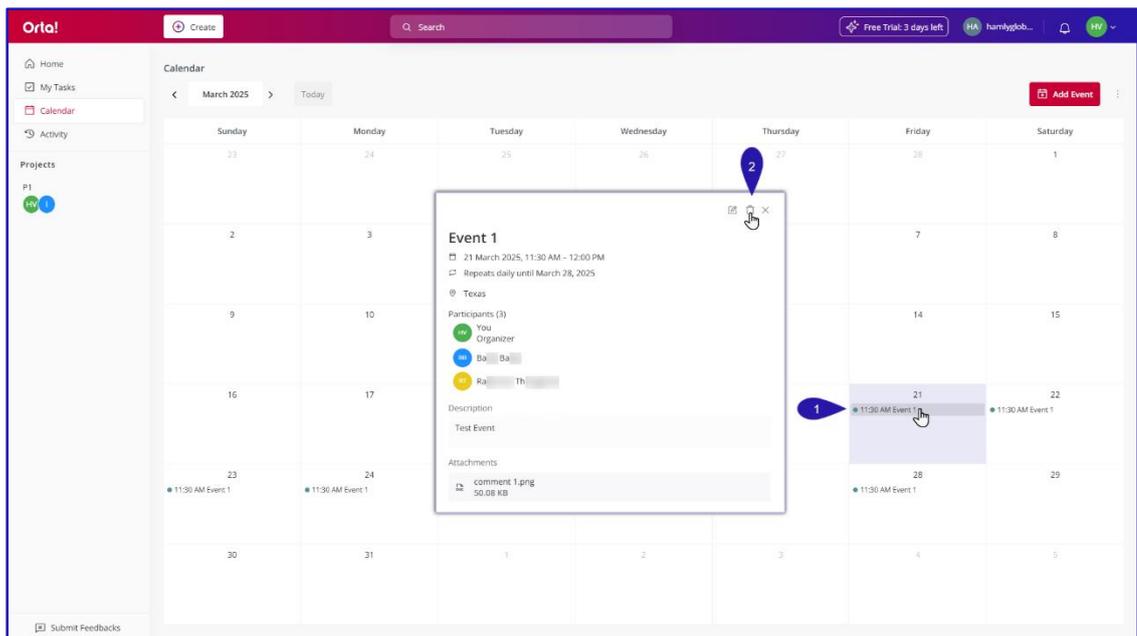


Figure 69 Delete an Event

### 3. Delete:

- Click **Yes, Delete** to finish the process.

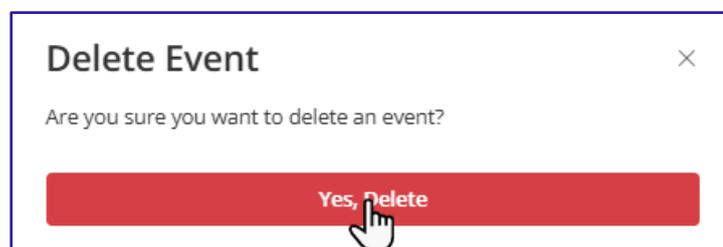


Figure 70 Delete Event

## Sync with Google Calendar

Our Google integration feature allows you to connect Orta's calendar directly to your Google Calendar. With one-way synchronization, any event you create, edit, or delete in Orta is automatically updated in your Google Calendar, ensuring your schedule remains aligned across platforms.

To sync your calendar with Google Calendar:

### 1. Navigate to the Calendar

- Click on the **Calendar** menu in the **Sidebar**.
- The **Calendar** main panel will open.

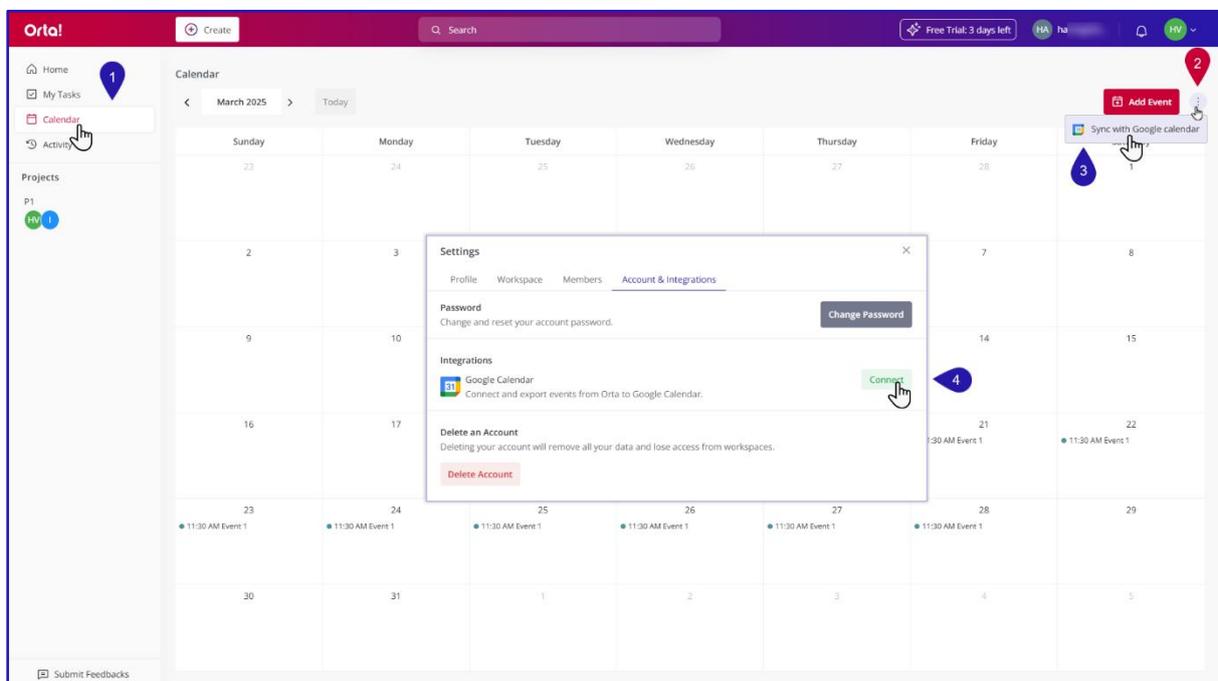


Figure 71 Connect to Google Calendar

### 2. Access Calendar Options

- Click on the **Kebab** menu located in the top right corner of the main panel.

### 3. Initiate Sync

- Select **Sync with Google Calendar** from the dropdown; a settings dialog box will appear.

#### 4. Connect to Google Calendar

- In the **Settings** dialog box, click the **Connect** button next to the **Google Calendar** option.

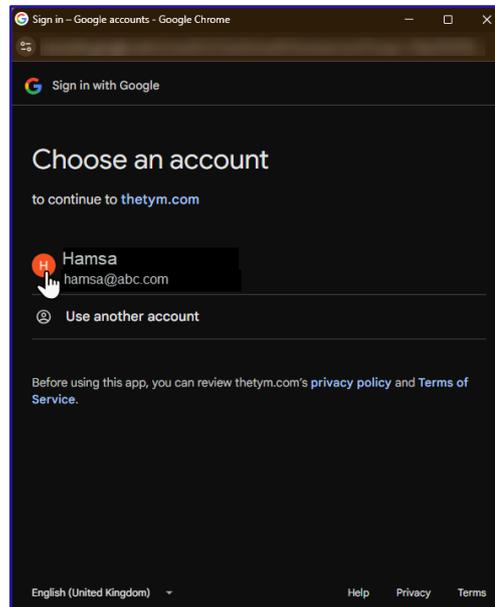


Figure 72 Choose an Account

#### 5. Choose an Account

- In the next page, you will be prompted to choose a Google account.
- Select the account you wish to use for syncing your Orta app calendar.

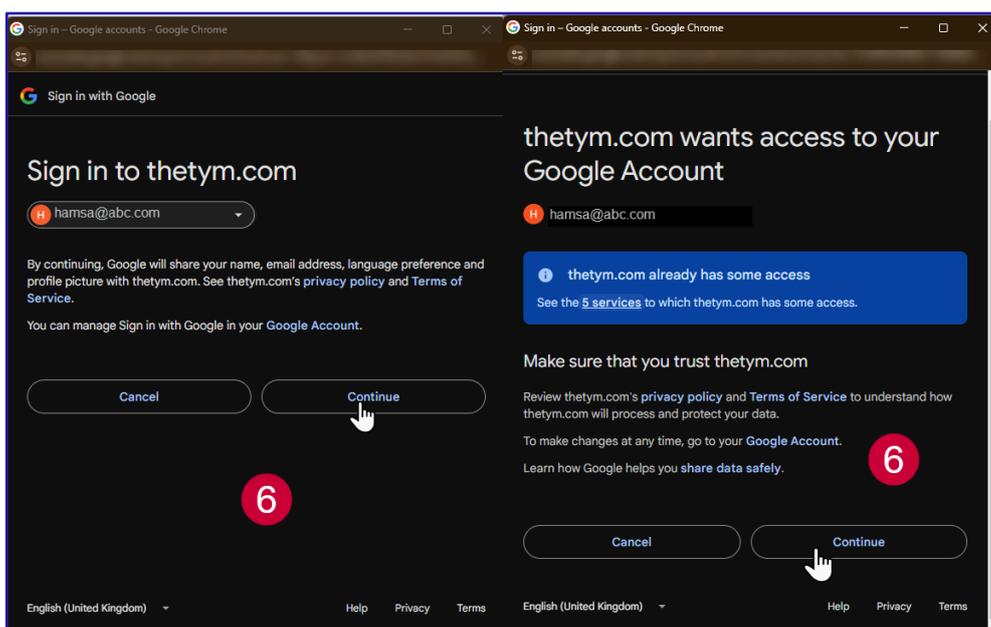


Figure 73 Sign in and Grant Permission

## 6. Grant Permissions

- On the next page, you will be asked to sign in and grant access.
- Follow the on-screen prompts to authorize Orta to connect with your Google Calendar.

### Note:

- **When you create an event:** It'll appear in both your Orta calendar and your Google Calendar, and you'll get in-app notification.
- **When you're invited to an event:** It'll appear in your Orta calendar and you'll be notified within Orta, keeping you in the loop.

## 7. Virtual Meeting Link

- **Need a virtual meeting?** Just leave the location blank when creating your event in Orta. Orta will automatically add the Google Meet link as the meeting location for you.

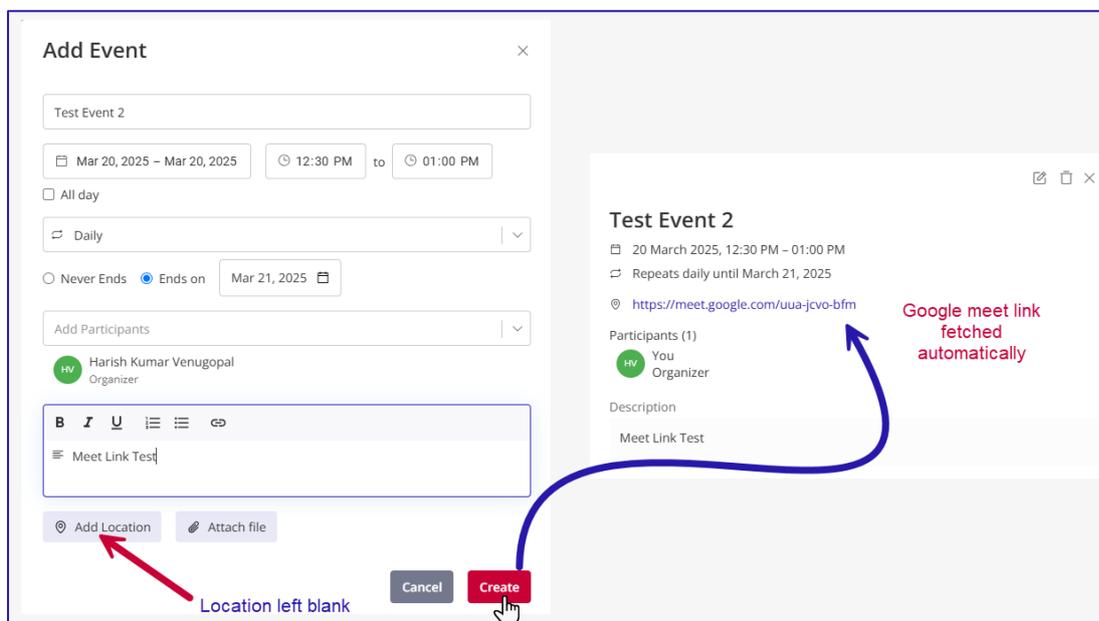


Figure 74 Meeting Link

## 8. Remove Google Calendar Sync:

To remove Google Calendar sync, do the following:

- Click on the **Kebab** menu located in the top right corner of the calendar main panel.
- Select **Remove Sync with Google Calendar** from the dropdown; **Settings** dialog box will appear.
- In the **Settings** dialog box, click the **Disconnect** button next to the **Google Calendar** option.

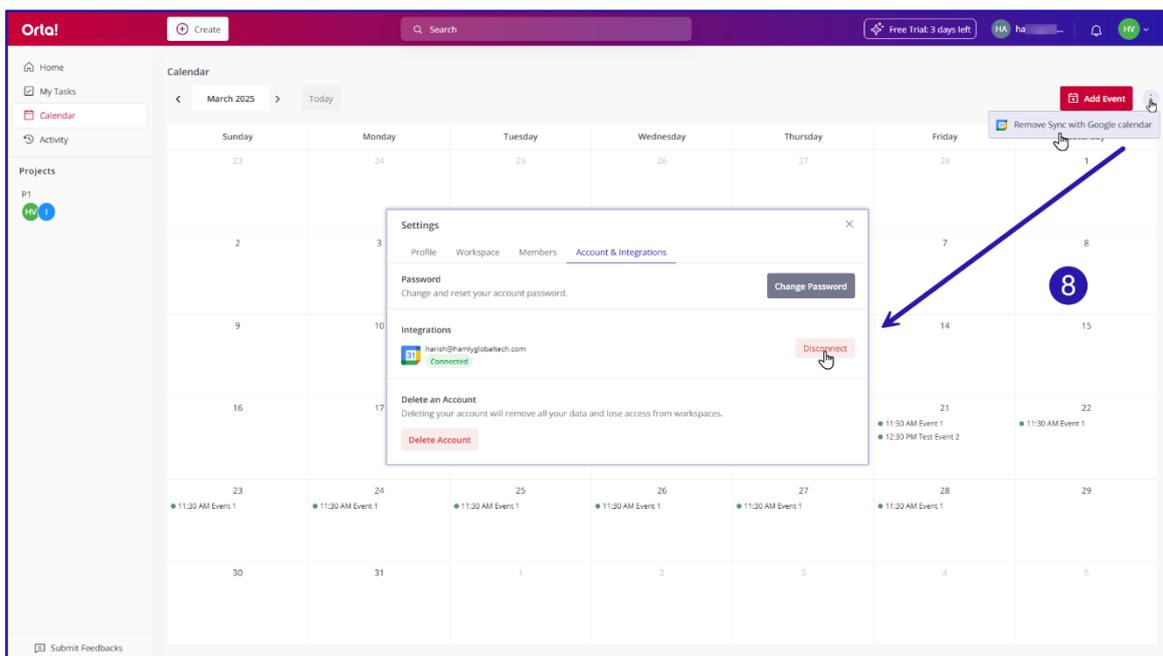


Figure 75 Remove Sync

## 9. Confirm Remove sync:

- In the **Remove Sync** dialog box that appears, click **Yes, Remove** to finish the Process.

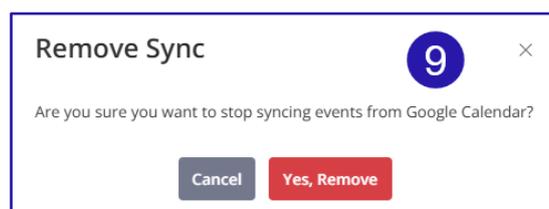


Figure 76 confirm

## Create Button

Click less, create more with Orta. **Create** button in Orta enables you to create projects, tasks, and events, and invite team members – all from a single, convenient location, without the hassle of navigating multiple menus.

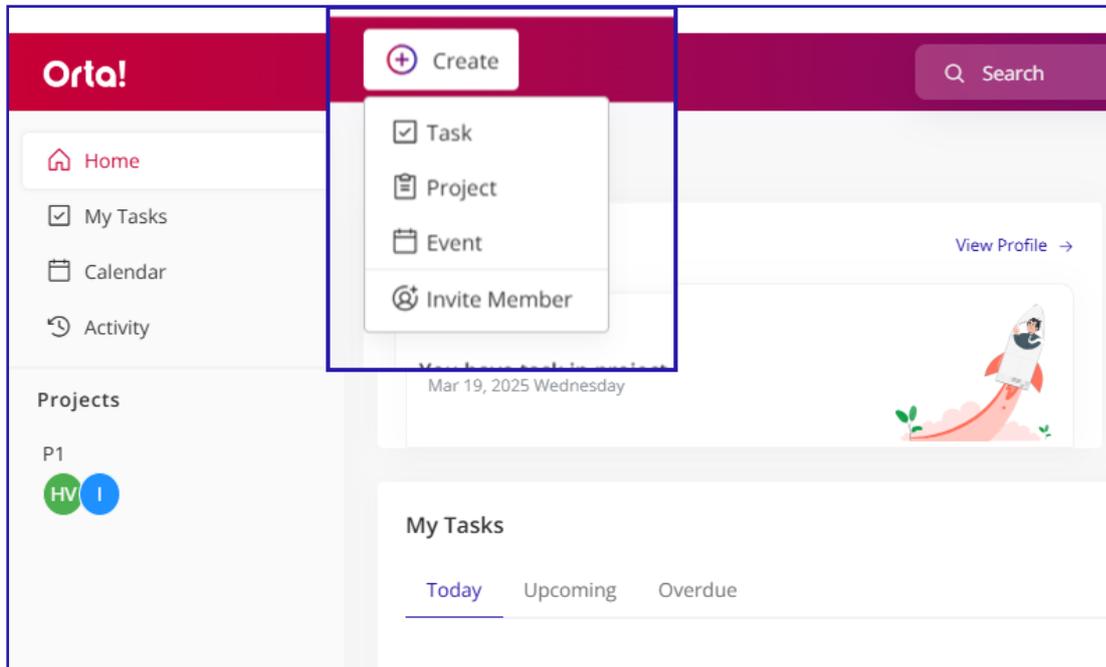


Figure 77 Create a Button

## Task

To create a new Task, do the following:

### 1. Create a Task:

- Click the **Create** button in the upper-right corner of the main pane.
- Select **Task** from the dropdown menu.
- The **Add Task** dialog box will appear.

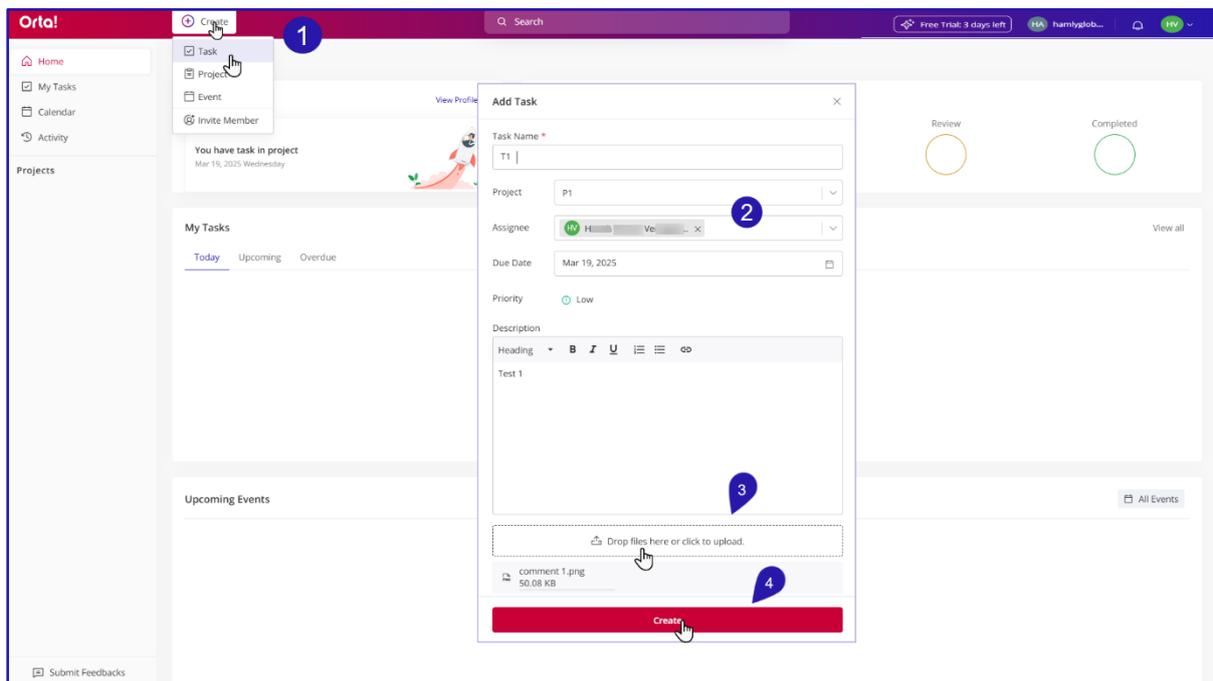


Figure 78 Create a New Task

### 2. Enter Task details:

- In the **Add Task** Dialog box fill all the necessary details such as **Task name, Project, Assignee, Due date, Priority** and **Description**.

### 3. Attach Files (Optional):

- Upload or drag and drop files if required.

### 4. Create the Task:

- Click **Create** to finish adding the task

## Project

To create a project, do the following:

### 1. Create a Project:

- Click the **Create** button in the upper-right corner of the main pane.
- Select Project from the dropdown menu.

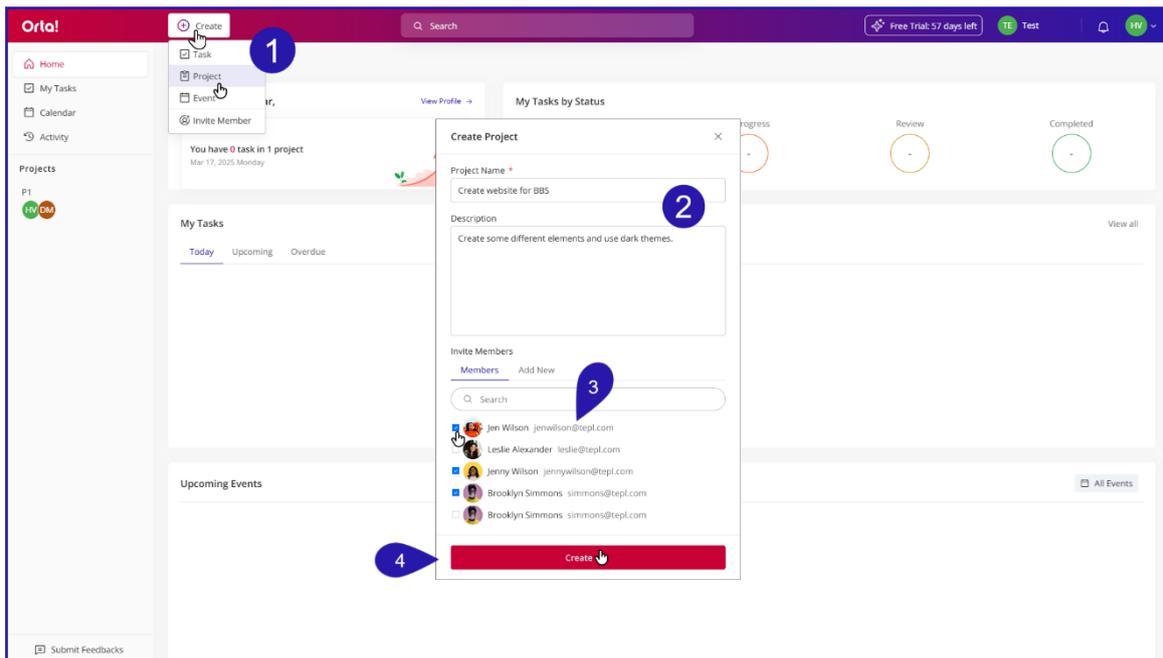


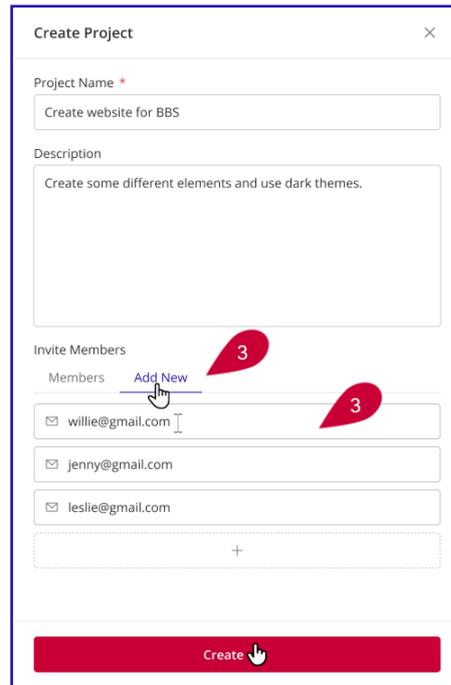
Figure 79 Create a New Project

### 2. Enter project details:

- In the **Create Project** dialog box, provide a project name and a brief description.

### 3. Invite members:

- Existing Members: Click and select the desired members from the provided list.



The screenshot shows a 'Create Project' dialog box. It has a title bar with a close button. The form contains the following sections:

- Project Name \***: A text input field containing 'Create website for BBS'.
- Description**: A larger text area containing the text 'Create some different elements and use dark themes.'
- Invite Members**: A section with a 'Members' tab and an 'Add New' button. A red callout bubble with the number '3' points to the 'Add New' button. Below this are three email input fields, each with a red callout bubble containing the number '3'. The first field contains 'willie@gmail.com', the second 'jenny@gmail.com', and the third 'leslie@gmail.com'. There is a '+' button in a dashed box below the third field.
- Create**: A large red button at the bottom with a mouse cursor over it.

Figure 80 Add Members

- New Members: Click on the **Add New** tab and enter the email addresses of new members in the text boxes.

#### 4. Finish creation:

- Click **Create** to finish creating the project.

## Event

To create an Event, do the following:

### 1. Add an Event:

- Click the **Create** button in the upper-right corner of the main pane.
- Select **Event** from the dropdown menu.

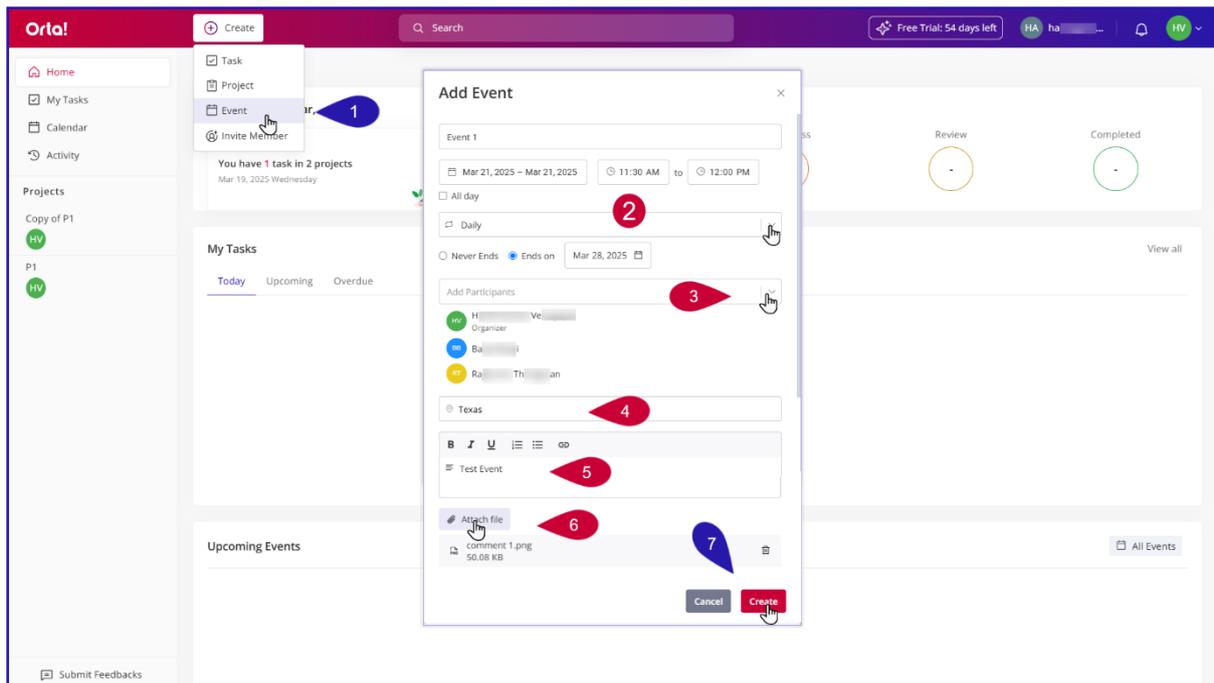


Figure 81 Add an Event

### 2. Add Event details:

In the **Add Event** dialog box, fill in the following fields:

- **Event Name:** Enter a descriptive name for the event in the text box at the top.
- **Date and Time:**
  - Set the event's start and end dates in the date selector fields.
  - Choose the start and end times using the time selectors.
  - If the event lasts all day, select the **All Day** checkbox.

- **Repeat Settings:**

- If the event repeats, choose the recurrence frequency from the dropdown (e.g., **Daily**)
- Specify whether the recurrence ends on a specific date or continues indefinitely by selecting **Never Ends** or **Ends on** and providing a date.

### 3. Add Participants:

- In the **Add Participants** field, search for and select required participants from the list.

### 4. Location:

- Click on **Add Location** button and specify the location of the event in the provided field (e.g. Thanjavur).

### 5. Add Description:

- In the text box at the bottom, enter additional details or a description for the event.
- Use the formatting toolbar (bold, italic, bulleted list, etc.) as needed.

### 6. Attach File:

- Click the **Attach File** button if you need to include a file.

### 7. Save the Event:

- Once all details are filled, click **Create** to save the event.
- To cancel the process, select **Cancel**.

## Invite Members

To invite members to a Project in your workspace, do the following:

### 1. Invite members:

- Click the **Create** button in the upper-right corner of the main pane.
- Select **Invite Member** from the dropdown menu.

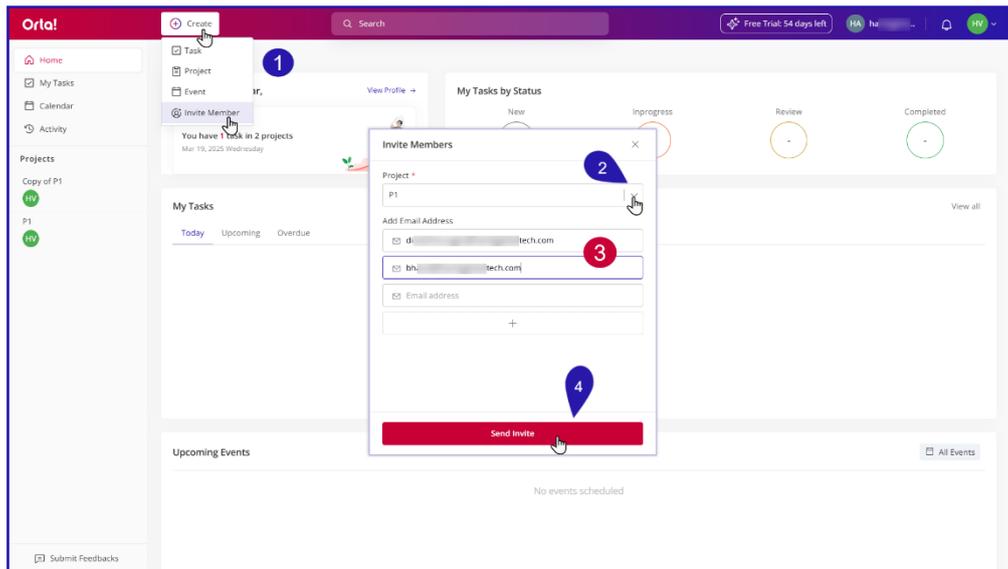


Figure 82 Invite Members

### 2. Select a Project:

- From the list of available projects, choose the one you want to invite members to.

### 3. Enter Email Addresses:

- Add the required email addresses of the members you want to invite in the provided text boxes.
- Ensure each email address is correct to avoid delivery issues.

### 4. Send the Invitation:

- Click on the **Send Invite** button to send the invitations.
- The members will receive an email with instructions to join the project.

## Settings

### Profile Settings

To change your profile settings do the following:

#### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

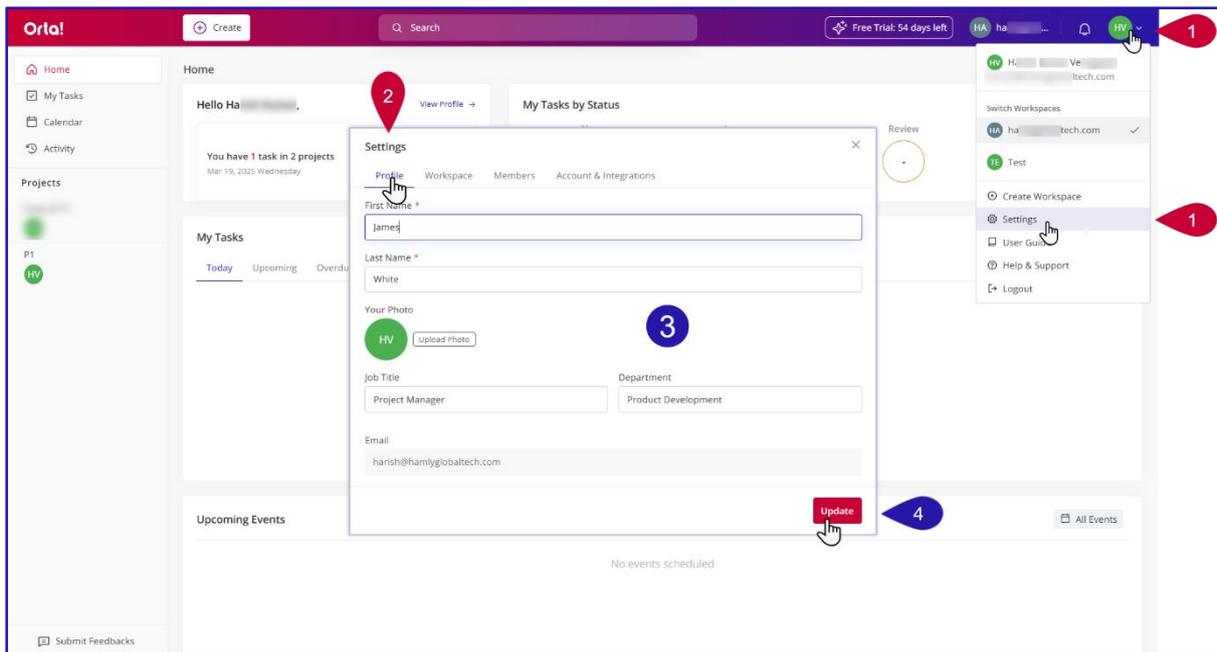


Figure 83 Profile Settings

#### 2. Navigate to the Profile tab:

- In the **Settings** dialog box, select the **Profile** tab.

#### 3. Change Details

- In the **Settings** tab, you can change your name, profile photo, Job Title, and Department.

#### 4. Save Changes

- Click on the **Update** button to save changes.

## Workspace Settings

To change your profile settings do the following:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

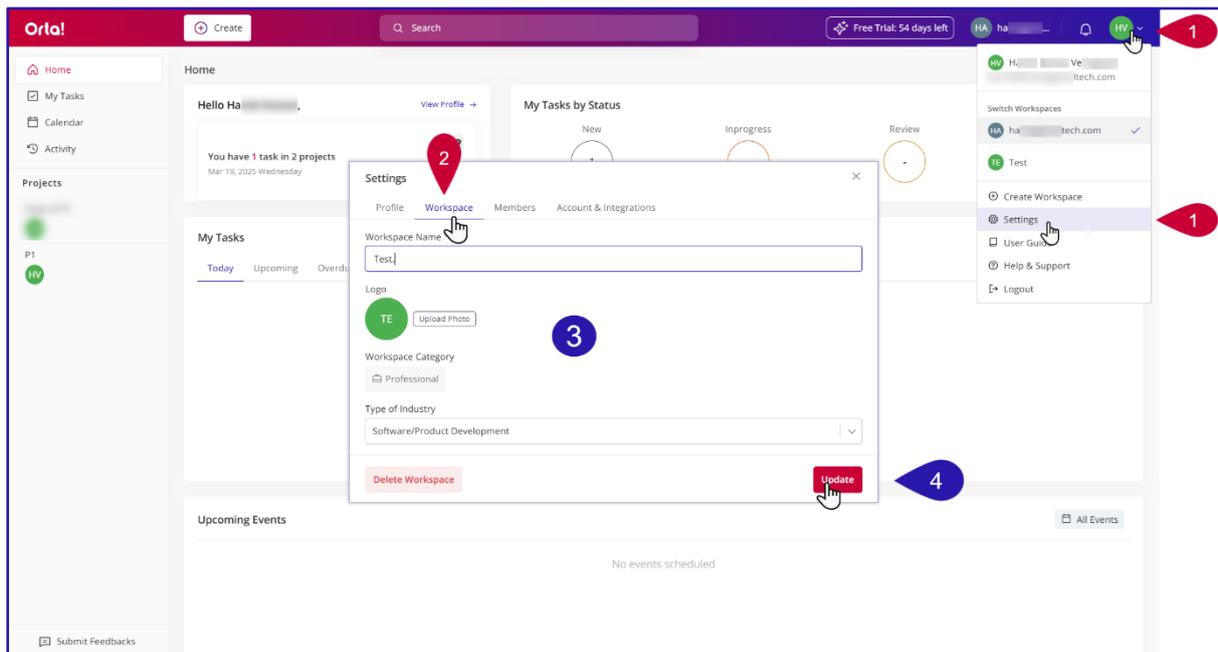


Figure 84 Workspace Settings

### 2. Navigate to the Workspace tab:

- In the **Settings** dialog box, select the **Workspace** tab.

### 3. Change Details

- In the **Workspace** tab, you can change your Workspace Name, Logo, and Type of Industry.

### 4. Save Changes

- Click on the **Update** button to save changes.

## Delete Your Account

Do the following to delete your account:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

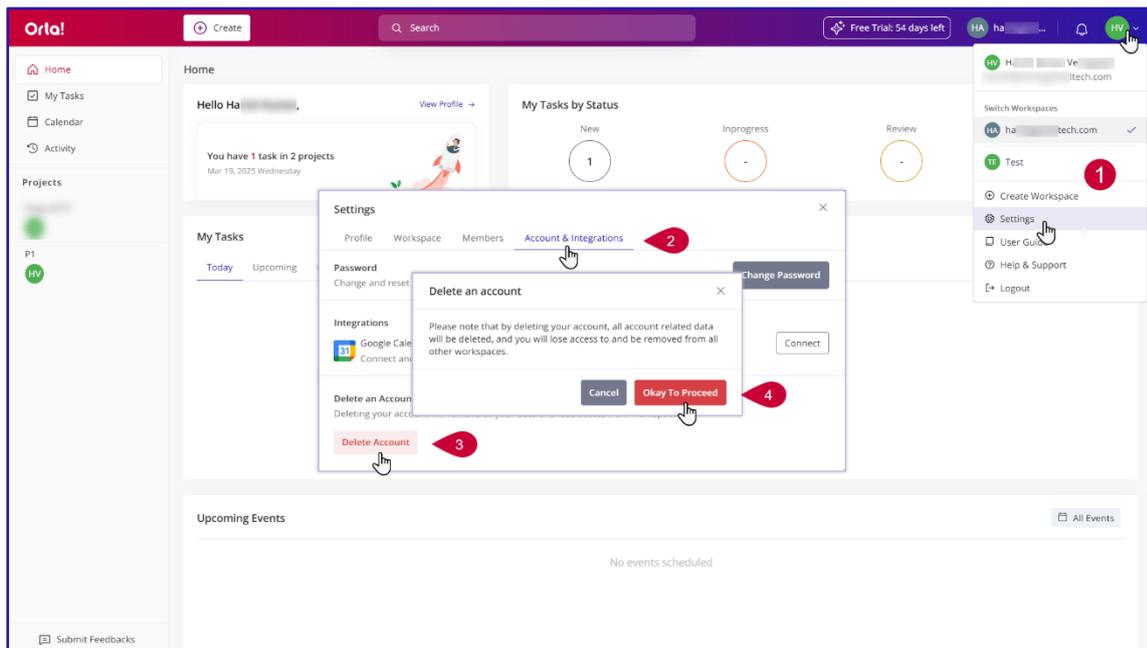


Figure 85 Settings

### 2. Navigate to the Account & Integrations Tab:

- In the **Settings** dialog box and select the **Account & Integrations** tab.

### 3. Delete Account:

- Click the **Delete Account** button at the bottom of the Settings dialog box.
- The **Delete an account** confirmation popup will appear.

### 4. Confirmation:

- In the confirmation dialog box, select **Okay To Proceed**.

### 5. Remove members:

- Your account cannot be deleted if any of your workspace still has members. Remove all members before proceeding with account deletion (Refer [Remove a Workspace Member](#)).

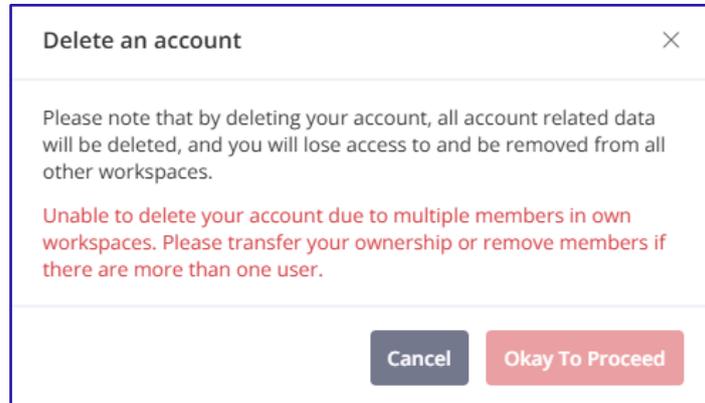


Figure 86 Delete an Account

### 6. Provide Password

- If you've removed all members, you'll be prompted to enter your password.
- Enter your password in the text box and click the **Confirm Delete** button to complete the process.

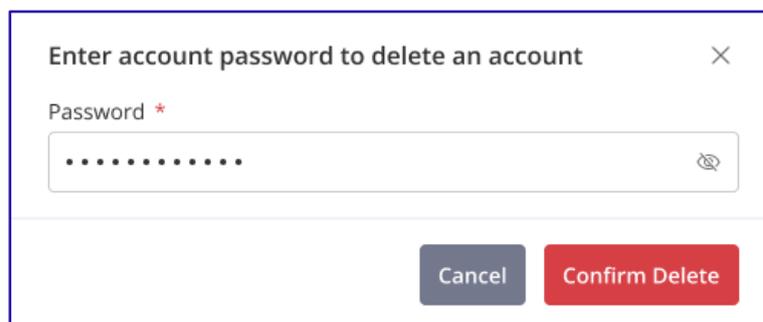


Figure 87 Enter password

To prevent permanent data loss, we will retain all your data for 30 days after your deletion request. During this period, your account remains deactivated and can be reactivated through the link provided in your email. After 30 days, your account will be permanently deleted.

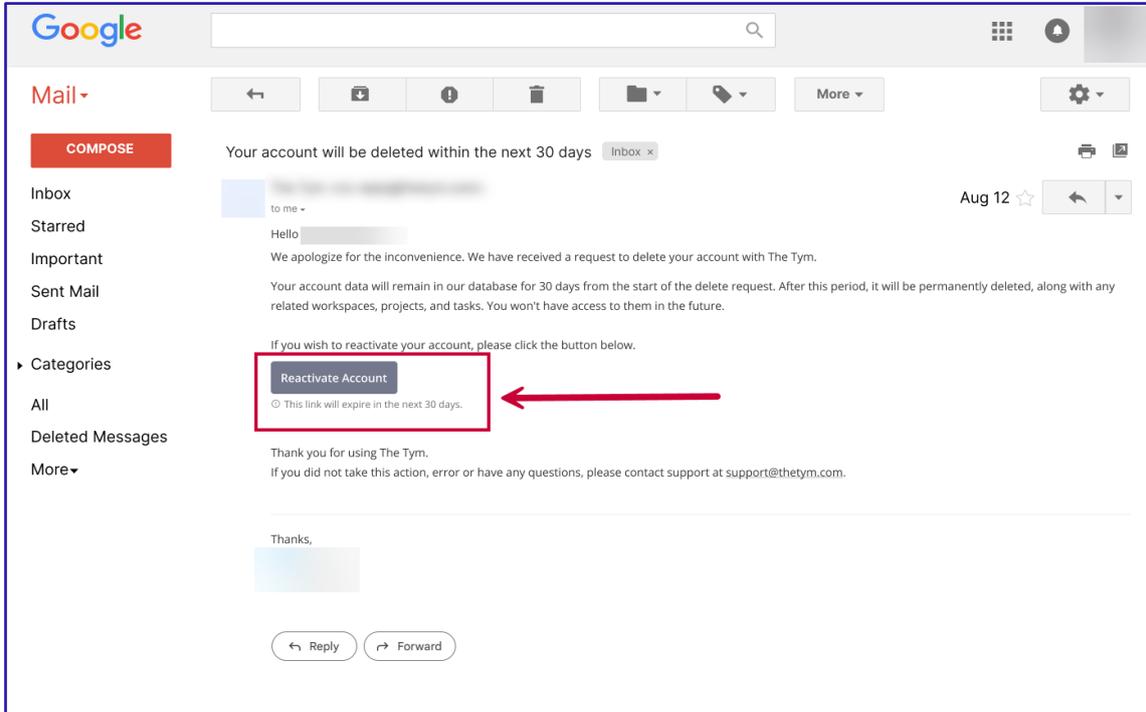


Figure 88 Email Intimation

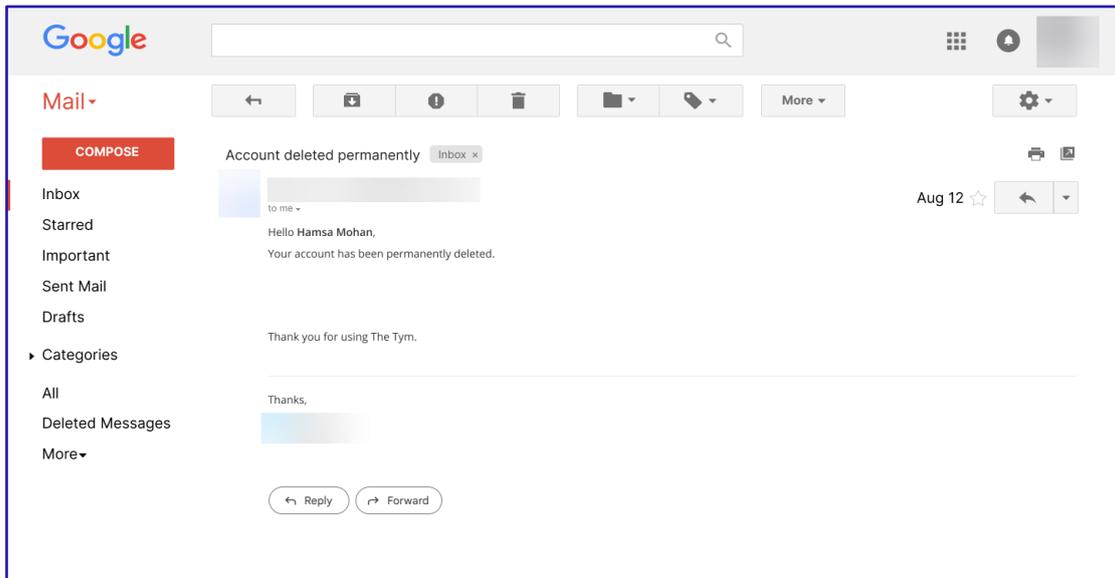


Figure 89 Account Deleted Permanently

## Google Integration

To integrate your Orta calendar with your Google calendar, do the following:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

### 2. Navigate to the Account & Integrations Tab:

- In the **Settings** dialog box, select the **Account & Integrations** tab.

### 3. Connect to Google Calendar:

- In the **Account & Integrations** tab, click the **Connect** button next to the **Google Calendar** option.

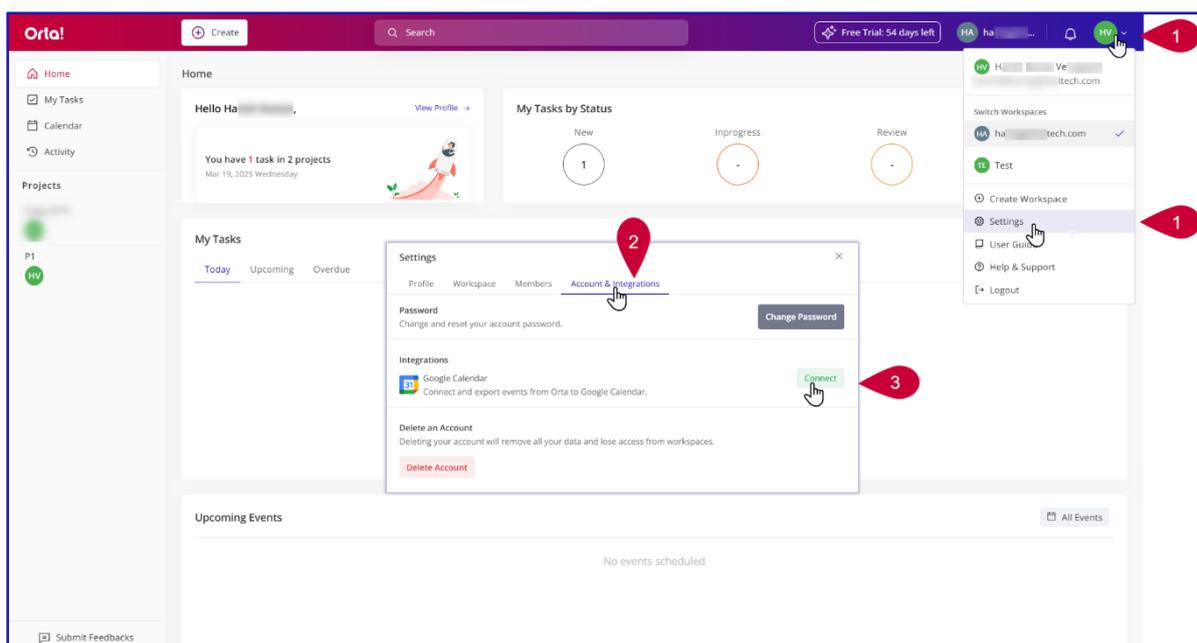


Figure 90 Google Calendar Sync

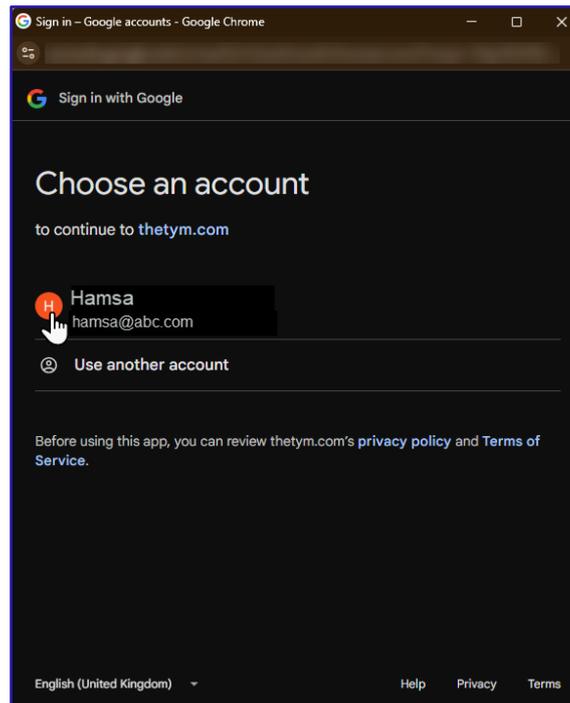


Figure 91 Choose an Account

#### 4. Choose an Account:

- On the next page, you will be prompted to choose a Google account.
- Select the account you wish to use for syncing your Orta app calendar.

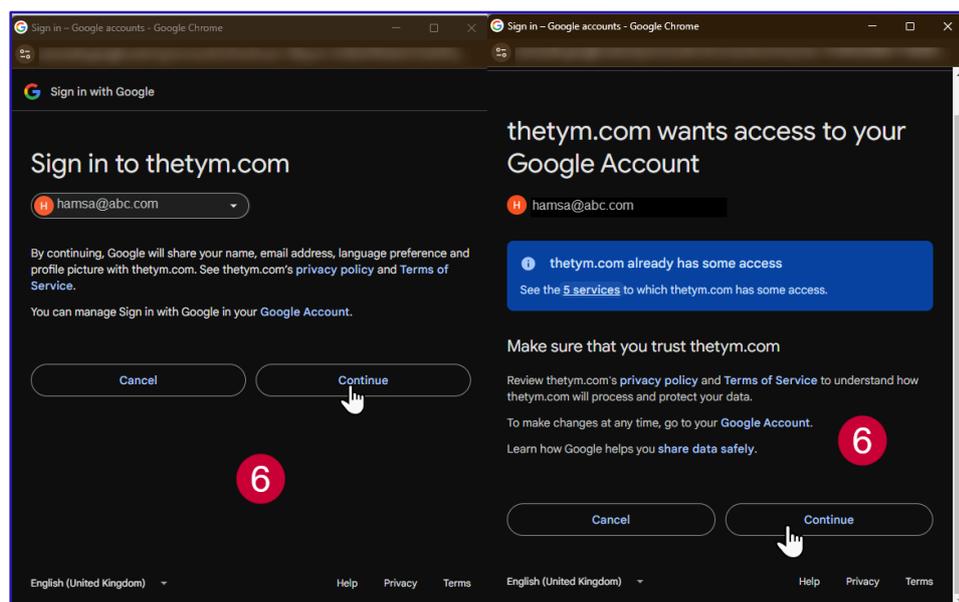


Figure 92 Sign in and Grant Permission

## 5. Grant Permissions:

- On the next page, you will be asked to sign in and grant access.
- Follow the on-screen prompts to authorize Orta to connect with your Google Calendar.

### Notes:

- **When you create an event:** It'll appear in both your Orta calendar and your Google Calendar, and you'll get in-app notification.
- **When you're invited to an event:** It'll appear in your Orta calendar and you'll be notified within Orta, keeping you in the loop.

## 6. Virtual Meeting Link

- **Need a virtual meeting?** Just leave the location blank when creating your event in Orta. Orta will automatically add the Google Meet link as the meeting location for you.

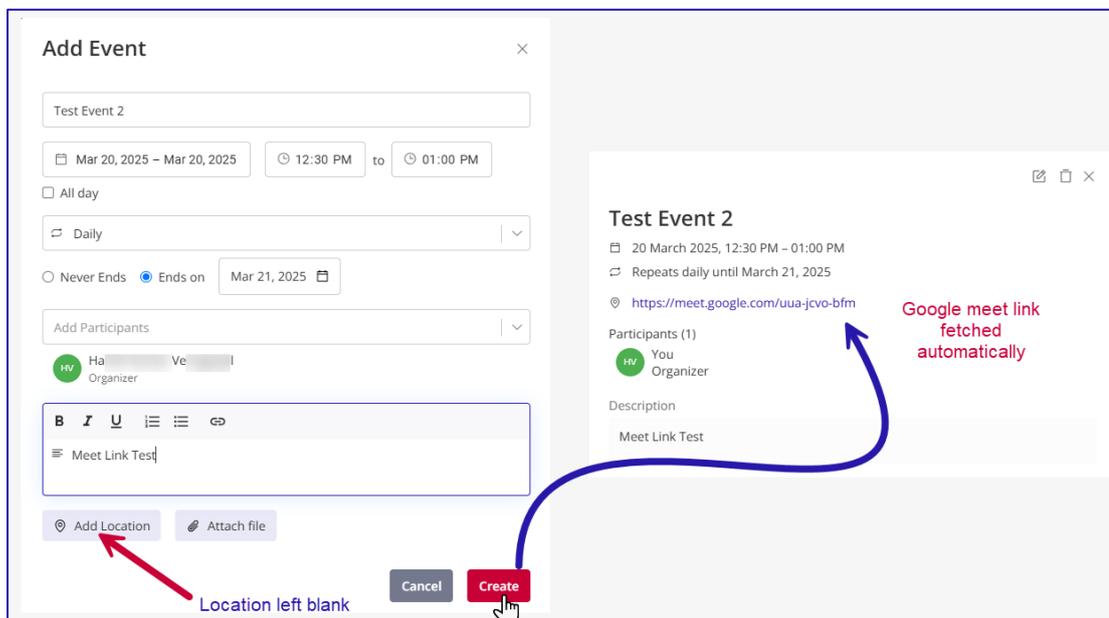


Figure 93 Meeting Link

## 7. Remove Google Calendar Sync:

To remove google calendar sync, do the following:

- In the **Account & Integrations** tab, click the **Disconnect** button next to the **Google Calendar** option.
- In **Remove Sync** dialog box, click **Yes, Remove** to complete the process.

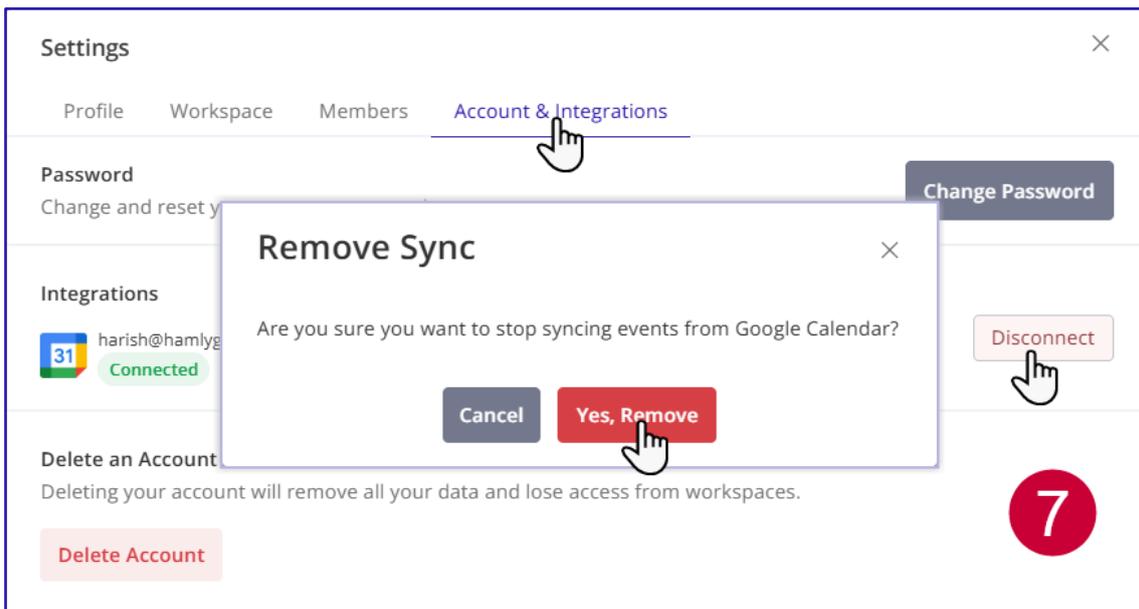


Figure 94 Disconnect Google

## Change Password

To change your password:

### 1. Open Settings:

- Click the **Profile** dropdown menu at the top-right corner of the page.
- From the dropdown menu, select **Settings**.

### 2. Navigate to the Account & Integrations Tab:

- In the **Settings** dialog box, select the **Account & Integrations** tab.

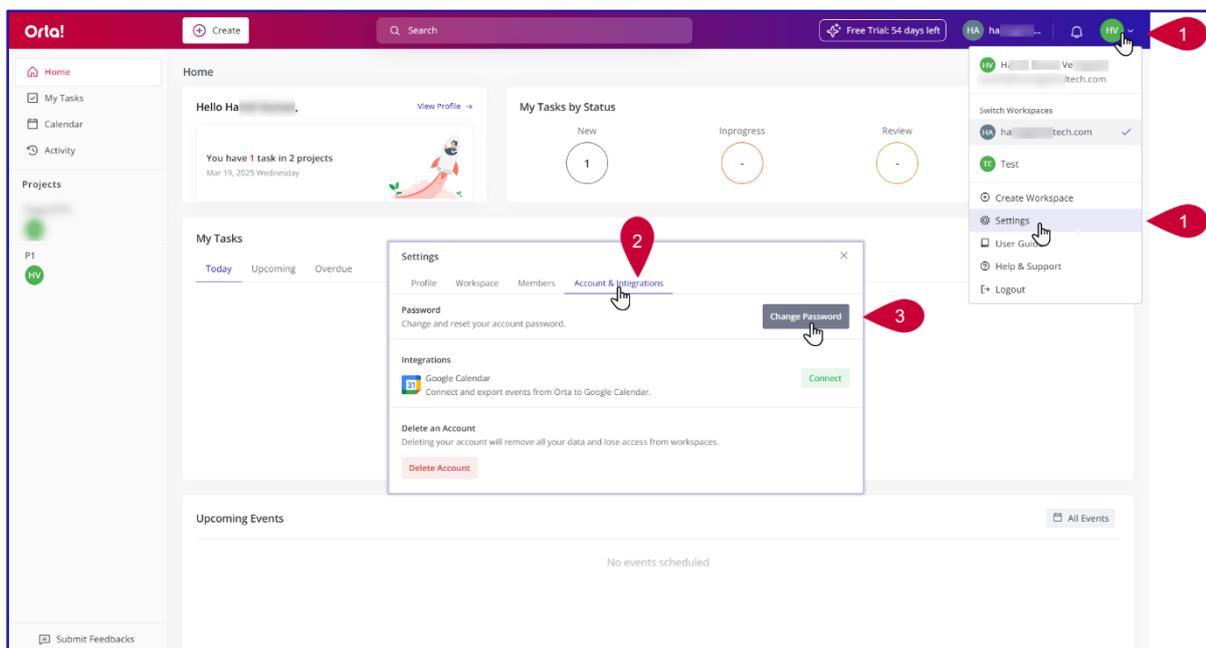


Figure 95 Change Password

### 3. Change Password:

- In the **Account & Integrations** tab, click **Change Password**.

Settings

Profile Workspace Members **Account & Integrations**

4

**Change Password**

Current Password \*

.....

New Password \*

.....

Confirm New Password \*

.....

Cancel Update

**Integrations**

31 ha tech.com Connected Disconnect

**Delete an Account**

Deleting your account will remove all your data and lose access from workspaces.

Delete Account

Figure 96 Update Password

#### 4. Update Password:

- You will be prompted to enter your current password and a new password.
- Enter your **Current Password**, and your **New Password**, and confirm the **New Password**.
- Click **Update** to store your changes.

## Help & Support

Need help? Simply click **Help & Support** in your profile drop-down. You can copy the support email or click it to send your question.

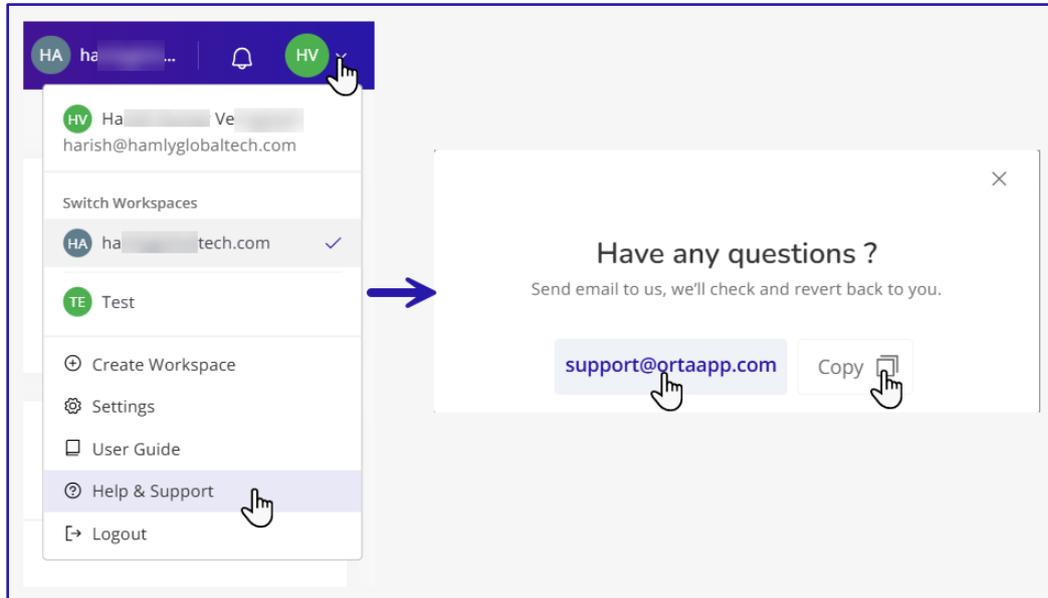


Figure 97 Help & Support

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