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 <u>Terms and Conditions</u> and <u>Privacy Policy</u>. 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:

All content in this guide is copyrighted by **Hamly Global Tech**. Unauthorized reproduction or distribution is prohibited.

Contact Information:

For questions or feedback regarding this guide or the product, please contact us at support@ortaapp.com

• Data Privacy:

We collect and use your data as described in our Privacy Policy.

Orta!

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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.
- 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 – <u>**Or**ganizing</u> <u>**Ta**sks</u> 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.





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.

Orta!	Create an Account Sign up and continue with email		
jame	mes@gmail.com		
First N	t Name *	Last Name *	
Jame	mes	White	
Passw	sword *		
		œ	
Confir	ifirm Password *		
		3	
وي ا مع ا	agree to the Terms and Privad Sign U or G Sign Up Wi	ty Policy.	
	Already have an ac	ccount ? Login	

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.

Google		٩	III o 🧕
Mail+	• 0	* 💊 * More *	\$\$ ~
COMPOSE	Confirm your email address Inbox ×		÷ 2
Inbox	Orta <no-reply@ortaapp.com></no-reply@ortaapp.com>		Aug 12 🏠 🔺 👻
Starred	Hello James White,		
Important	You're almost ready to get started, please confirm your email address	to continue.	
Sent Mail	Confirm Your Email address		
Drafts			
 Categories 	Thanks,		
All	Orta!		
Deleted Messages			
More▼	(Reply) (r Forward)		

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 <u>Create Your First</u> <u>Workspace</u>.

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.

Orta!		Don't have an account ? Create an account
	Welcome to Orta Login and continue with email Email * james@gmail.com Password *	
	🗄 Forgot your password?	
	Login	
	or	
	G Login With Google	

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.

Orto!		Don't have an account ? Create an account
	Welcome to Orta	
	Email * Password *	7
	C Forgot your password?	
	G Login With Google	

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.



Orta!	
	Reset your Password Enter your registered email Email * james@gmail.com Send Link Send Link

Figure 5 Reset Your Password

	Reset your password Inbox ×
	✦ Summarise this email
0!	Orta 3
	Hello James White It seems you have forgotten your password. Please create a new password by clicking the button below or using the provided link.
	Create New Password If you on't request to reset your password, you can simply ignore this email, and your password will remain unchanged.
	Thanks, Orto!
	← Reply → Forward

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.

Orto!	
	3
	Create a Password
	New Password *
	······ @
	Confirm Password *
	Save Changes
l	

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.



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**).

Orta!	
	Welcome, James White Setup Your Workspace
A Tool for Organizing Your Workspace	Workspace Name * Beta
	Your Workspace Category * O I'm a Student o For educational purposes only. Organizational or personal use.
	Type of Industry * Software Development ~
	4 Team Size *
	Job Title Product Designer 1
	Continue

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.

Orta! A Tool for Organizing Your Workspace	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!		HM Hamsa Mohan
	Join Workspace Already have a workspace associated with this email domain thanjavurexports.com	
	I Member	
	or Would you like to create new? Create Workspace	
L		

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.

Orta!	
	Welcome, James White
	Setup Your Workspace
A Tool for Organizing Your Workspace	
	Workspace Name *
	bussinesssolution.com
	Type of Industry *
	Software Development
	Team Size *
	→ 1-10 ~
	Job Title
	Product Designer 1
	Continue

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.

	Your journey begins here ← Create Your First Project
A Tool far Organizing Your Workspace	Project Name * My First Project Invite Members
	posprinegma.com Email address Email address Email address Email address
	Note: You can add more members later.

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.

sks						
isks	Home					
	Hello James White,	View Profile →	Tasks by Status			
vity	You have 122 tasks in 3 projects Sep 28, 2023 Thursday	N. JA	New 20	Inprogress	Review 35	Completed 55
ns Improvement			-	_		
Design	My Tasks Today Upcoming Overdue		3			Vies
gn Management	Task ID	Name	Р	roject	Status	
A 🕽 🔒 +8	1010001	Brainstorm session	N	farketing	New	
	1010002	Assign resources to design task	c	ampaign Management	Roview	
	1010003	Brainstorm session	v	Vebsite Design	Inprogress	
	1010004	Brainstorm session	v	Vebsite Design	inprogress	
	1010005	Brainstorm session	V	Vebsite Design	Review	
	Upcoming Events					🛗 View Calen
	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	
Submit Feedbacks						

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.

ta!	G Create		Q Search		Free Trail: 14 days left	😡 My Workspace 🛛 🚨 🧕
Home	Home					
My Tasks	Hello James White,	View Profile →	Tasks by Status			
Calendar Activity	You have 122 tasks in 3 projects Sep 28, 2023 Thursday	2	New 20	Inprogress	Review 35	Completed 55
erations Improvement		¥				
bsite Design	My Tasks Today Upcoming Overdue					View Al
mpaign Management	Task ID	Name	Pr	oject	Status	
CAD +8	1010001	Brainstorm session	м	arketing	New	
	1010002	Assign resources to design task	C	impaign Management	Review	
	1010003	Brainstorm session	W	ebsite Design	Inprogress	
	1010004	Brainstorm session	w	ebsite Design	Inprogress	
	1010005	Brainstorm session	W	ebsite Design	Review	
Sidebar						
	Upcoming Events					📋 View Calenda
	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	
Submit Feedbacks						

Figure 14 Sidebar



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

Home page

1. 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.

☆ Home

- 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.

Orta!	Create		Q Search		🞸 Free Trail: 14 days left)	😼 My Workspace 📔 💭 🖉
A Home	Home					
🗹 My Tasks 🗸	Hello James White,	View Profile \rightarrow	Tasks by Status			
D Activity	You have 122 tasks in 3 projects Sep 28, 2023 Thursday	8	20 New	12 Inprogress	Review 35	Completed 55
Projects Operations Improvement		*	\bigcirc	\cup		\bigcirc
E C S A D +2	My Tasks		Home Ma	in Panel		View All
Website Design	Today Upcoming Overdue					
Campaign Management	Task ID	Name		Project	Status	
SCAPD .	1010001	Brainstorm session		Marketing	New	
	1010002	Assign resources to design task		Campaign Management	Resteur	
	1010003	Brainstorm session		Website Design	Inprogress	
	1010004	Brainstorm session		Website Design	Inprogress	
	1010005	Brainstorm session		Website Design	Review	
	Upcoming Events					E View Calendar
	Date	Time	Event Title		Project	
	Sep 28, 2023	09:00 AM to 10:00 AM	Daily Standup 5	ession	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 5	ession	Marketing	
	Sep 28, 2023	09:00 AM to 10:00 AM	Daily Standup 5	iession	Marketing	
Submit Feedbacks						

Figure 15 Home



My Tasks

1. Click on

My Tasks

to open the My Tasks main section.

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

🕂 Create	C .	Search				💠 Free Trial:	35 days left TW	🔲 o 🏑
My Tasks								
Assigned to	me Created by me							
Filter by Status:	All (10) • New (1) • Inprogress (1)	Review (1) Completed	(7)					
Task ID	Name	Project	Due Date	Status	Priority	Last Updated	Created By	Created On
1010024	Т1	P1	Feb 18, 2025	New	Medium	Feb 17 ,2025 10:25 AM	B	Feb 17 ,2025 10:25 AM
1010017	Discuss about terms and Policy		Feb 28, 2025	Review	 Medium 	Mar 12 ,2025 11:31 AM	B	Jan 28 ,2025 6:09 PM
1010016	Writer Review		Jan 29, 2025	Inprogress	() Medium	Mar 12 ,2025 11:31 AM	B	Jan 25 ,2025 6:24 PM
1010015	How to Set a task reminder		Jan 29, 2025	Completed	() Low	Feb 3 ,2025 10:08 AM	B	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	B	Jan 25 ,2025 10:45 AM
Assigned to / Filter by Status: Task ID 1010024 1010017 1010016 1010015 1010014	All (10) • New (1) • Inprogress (1) Name T1 Discuss about terms and Policy Writer Review How to Set a task reminder Create a FAQ section for landing page	Review (1) Completed Project P1	Due Date Feb 18, 2025 Feb 28, 2025 Jan 29, 2025 Jan 29, 2025 Jan 25, 2025	Status New Review Completed	Priority O Medium O Medium O Medium O Low O High	Last Updated Feb 17, 2025 10.25 AM Mar 12, 2025 11.31 AM Mar 12, 2025 11.31 AM Feb 3, 2025 10.08 AM Jan 25, 2025 4:24 PM	Created By	Created On Feb 17,2025 1 Jan 28,2025 6: Jan 25,2025 6: Jan 25,2025 6: Jan 25,2025 1

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.

① Create		၃ Search				< Free Trial	: 35 days left TW	0 - C
My Tasks								
Assigned to	o me Created by me							
Filter by Status:	All (10) • New (1) • Inprogress (1)	Review (1) Completed	1 (7)					
Task ID	Name	Project	Assignee	Due Date	Status	Priority	Last Updated	Created On
1010024	T1	P1		Feb 18, 2025	New	O Medium	Feb 17 ,2025 10:25 AM	Feb 17 ,2025 10:25 AM
1010017	Discuss about terms and Policy		<u>A</u> IA	Feb 28, 2025	Review	① Medium	Mar 12 ,2025 11:31 AM	Jan 28 ,2025 6:09 PM
1010016	Writer Review		G	Jan 29, 2025	Inprogress	① Medium	Mar 12 ,2025 11:31 AM	Jan 25 ,2025 6:24 PM
1010015	How to Set a task reminder		le	Jan 29, 2025	Completed	① Low	Feb 3 ,2025 10:08 AM	Jan 25 ,2025 6:23 PM
1010014			<u>A</u> IA	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.

Filter by Status:	All (5)	• New (2)	Inprogress (1) Review (1)	Completed	d (1)					
Task ID	Name		Tasks in	Project	Assignee	Due Date	Status	Priority	Last Updated	Created On
1010403	Task 4		review	P2	HV	Jan 10, 2025	Review	Medium	Jan 7 ,2025 10:53 AM	Jan 7 ,2025 10:52 AM
Filter by Status:	All (5)	New (2)	Inprogress (1) Review (1)	Complete	ed (1)					
Task ID	Name			Project	Assignee	Due Date	Status	Priority	Last Updated	Created On
1010407	T1		Tasks in	P1	HV	Jan 07, 2025	New	① High	Jan 7 ,2025 4:08 PM	Jan 7 ,2025 4:08 PM
1010402	Task 3		progress	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
Filter by Status:	All (5)	New (2)	Inprogress (1) Review (1)	 Completed 	(1)					
Task ID	Name			Project	Assignee	Due Date	Status	Priority	Last Updated	Created On
1010407	Т1		New Tasks	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	① 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.

Calendar						
< March 2025 >	Today					Add Event
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
23					28	1
2	3	4	5	6	7	8
9	10	11	12	Ø	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31				4	

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.

Activity C
Feb 17, 2025
Vou assigned a task to in the project PL. 1025AM Task: T1
Vou assigned a task to in the project P1. 10254M Task: T1
Vou created a task in the project P1, 1003 AM Task: T1
Feb 14, 2025
You updated the task due date from 'Jan 29, 2025' → 'Feb 28, 2025' in the project Task:
You updated the task status from freezeres A Compared in the project Task Project Task Project
You changed project role from member to owner, 1028 AM Project P1
Feb 10, 2025
joined the project. e12 AM
Feb 08, 2023
deleted a task in the project E11 PA
Project:
Z You rested the project. enorme Project
created a task in the project set roll Task schedib
Feb 05, 2025

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.

Orta!	Create		Q scoren		🔗 Free Trail: 14 days left	👼 Ny Workspace 🚨
(A) Home	Home					
Calendar	Hello James White,	Vew Profile (+	Tasks by Status	Investment	Deview	Correlated
© Activity Projects	You have 122 tasks in 3 projects Sep 28, 2023 Thursday		20	12	35	55
Operations Improvement	My Tasks					View All
(R)	Today Upcoming Overdue					
Campaign Management	Task ID	Name		Project	Status	
୍ରାଷ୍ଟ୍ରର ା	10:0001	Brainstorm session		Marketing	New	
49	1010002	Assign resources to design task		Campaign Management	Review	
	1010003	Brainstorm session		Website Design	(inprogress	
1	1010004	Brainstorm session		Weasite Design	ingroup ess	
-	1010005	Brainstorm session		Website Design	Review	
	Upcoming Events					📋 View Calendar
	Date	Time	Event Title		Project	
	Sep 28, 2023	69:00 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	69:00 AM to 10:00 AM	Daily Standup Session		Marketing	
	Sep 28, 2023	69:00 AM to 10:00 AM	Daily Standup Session		Marketing	
Submit Feedbacks						

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.

Projects			
T1 :			Add Task
Overview Tasks			
Description			
Write about the project			
	2		
Members Q Search			Sk Invite
Name	Email	Role	
HO You	harish@hamiyglobaltech.com	Owner ~	

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**.

Orta!	Create Q Search	Top Bar	Free Trial: 59 days left	н с ну-
බ Home I My Tasks ඕ Calendar ී Activity	Task Project Ferent Vent Vent Vent S	lown		Harish Kumar Venugopal harish@hamiyglobaltech.com Switch Workspaces @ hamiyglobaltech.com
Projects P1 (10)	Description Test		Profile Dropdown	Crate wonspace Settings User Guide Melp & Support Logout
	Members Q Search Name 100 You	Email		Ør invite Role Owner ∨
Submit Feedbacks				

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.

Γ. _{C.}		
Notifications	Mark all as read	×
Mar 14, 2025		
you to the project P1.	invited	

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 <u>User Roles and Permissions</u> 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.



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**).

Orta!	×
A Tool for Organizing Your Workspace	Create New Workspace Workspace Name * To Bea Tour Workspace Category * Tor a Student Tor a

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:

Orta!	⊕ Create	Q Search	🛠 Free Trial: 59 days left 🛛 🗛 ha 🖉 🗘 📿 🖓 🗸
A Home	Home		B H V U
 My Tasks Calendar 	Hello	view Profile → My Tasks by Status	Switch Workspaces
③ Activity	You have 0 task in 1 project	Rev Inprogress	Review
rojects	Mar 14, 2025 Friday		© Settings
P1	My Tasks Today Upcoming Overdue	Settings	Uter Guide Uter
		4 Workspace Name Test 1 Logo Workspace Category B Organization Trace of Hodapy	
	Upcoming Events	6 Accounting	All Events
		Delete Workspace	Update 7

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 <u>User Roles and Permissions</u> Privileges table for more details.

Orta!

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**.

Orta!	⊕ Create	Q Search	Free Trial: 59 days	ileft HA ha
G Home ✓ My Tasks	Home	Var Andre - Mar Tarla da Castan		H V ha .com
Calendar Calculuty Projects P1	You have 0 task in 1 project Mar 14, 2025 Friday	New Color	Inprogress Review	Create Workspace Com Create Workspace Settings User Guid
•	My Tasks	2	~	③ Help & Support E* Logout
		Profile Workspace Members Account & Integrations Manage Members G Search Name Email	2 Members Bolo Set as Manager Remove from Workspace	
	Upcoming Events			All Events
		No events sched	fuled	
Submit Feedbacks				

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.



Note: Only **Workspace Owner** and **Workspace Manager** are authorized to remove members from a workspace. For more details, refer to the <u>User Roles</u> <u>and Permissions</u> 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.

Orta!	⊕ Create		🞸 Free Trial: 59 days I	left HA ha 🗘 🙀 🗸
A Home	Home			H V
 My Tasks Calendar 	Hello .	View Profile → My Tasks by Status		Switch Workspaces
"D Activity	You have 0 task in 1 project	e Inprogress	Review	Create Workspace
Projects	Mar 14, 2025 Friday		\bigcirc	Settings Jm
P1	My Tasks	Settings	×	User Guide Help & Support F* Logout
	Today Upcoming Overdue	Profile Workspaces Members Account & Integrations		
		Workspace Name Test 1 Delete Morkspace		
		Logo Unit a workspace will permanently remove all related projects, removed and lose all access. Workspace Ciri		
		It Organization Cancel Proceed To Delete	4	
		Accounting	~	
	Upcoming Events	3 Delete Workspace	Undate	All Events
		J.		
Submit Feedbacks				

• 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.

Workspace

Orta!



- 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 <u>Transfer Workspace Ownership</u>.



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**.

Orta!	⊕ Create	Q Search	🌣 Free Trial: 59 days left 🛛 🗛 ha 👘 🗘 🦷
Home	Home		H V ha .com
☑ My Tasks 苗 Calendar	Hello	View Profile -> My Tasks by Status	Switch Workspaces
S Activity	You have 0 task in 1 project	New Inprogress	- Create Workspace
Projects P1	mer re, soss rinny		© Settings
60	My Tasks	Settings 2	③ Help & Support C E+ Logout
	Today Upcoming Overdue	Profile Workspaces Members Account & Integrations	
		Vorkspace Name Test 1 Leave Workspace ×	
		Logo Uple Click confirm to leave from this workspace named Uple Uple Undone. Please note that this action cannot be	
		Workspace Cate O Leaving the workspace will result in losing access to all projects, In Organization	
		Type of Industry Cancel Confirm 4	
	Upcoming Events	Accounting 2m	🗎 All Events
		Leave Workspace	
 Submit Feedbacks 			

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 <u>Transfer Workspace Ownership</u>.



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**.

Orta!	① Create	Q Search	💉 Free Trial: 59 days left	
G Home	Home			H V ha .com
 My Tasks Calendar 	Hello ,	View Profile My Tasks by Status New	Innyndrass Review	Switch Workspaces
3 Activity Projects P1	You have 0 task in 1 project Mar 14, 2025 Friday			Create Workspace Settings
R	My Tasks	2		 Over data = Help & Support E+ Logout
	tong sponning Onstau	Settings Profile Workspace Members Account & Integrations Manage Members Q Search Name Email D S	2 Members Set as Manager Remove from Vorkspace Member	
	Upcoming Events			🛱 All Events
		No events sched	uled	
Submit Feedbacks				

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.



• 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 <u>User Roles and Permissions</u> 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**.

Orta!		Q. Search	🞸 Free Trial: 59 days left 🛛 HA ha 🔰 📮 🤫 🗸
A Home ✓ My Tasks	Home		M V. ha .com
Calendar Calendar Activity Projects	Hello You have 0 task in 1 project Mar 14, 2025 Finday	Vew Polle → My Tasks by Status New Inprogress	Skitch Workspaces
P1	My Tasks Today Upcoming Overdue	Settings	User Guide Weip & Support X E* Legout
		Vorkspace Name Delete Workspace X Test 1 Delete Workspace X	
		Logo University of the start of	
	Upcoming Events	Type of Industry Accounting Proceed To Delete	C All Events
	3	Delete Workspace	Update
Submit Feedbacks			

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.

Workspace

Orta!

Transfer Workspace Ownership	\times
Select the member *	
	Ĩ
Make As Workspace Owner	

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.

Orta!	(+) Create	Q. Search	Free Trial: 57 days left	TE Test 🛛 🖓 🗤 🗸
 ➢ Home ☑ My Tasks ☑ Calendar ③ Activity 	Task 1 Project Even vr, © Invite Member	Vee Profe -> My Tasks by Status Create Project × rogress	Review	Completed
Projects P1	You have 0 task in 1 project Mar 17, 2025 Monday	Project Name *	(\cdot)	
	Today Upcoming Overdue	Create some different elements and use dark themes.		view an
		Invite Members		
		C Search S		
	Upcoming Events	Comparing Control		🗇 All Events
		4 Creste		
Submit Feedbacks				

• 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.

Project Name *				
Create website fo	or BBS			
Description				
Create some diff	erent elen	ents and use	dark themes.	
Invite Members Members A	dd New	3		
	V -		- 2	
🛛 willie@gmail.	com]		3	
☑ willie@gmail.☑ jenny@gmail	com]		3	
 ☑ willie@gmail. ☑ jenny@gmail ☑ leslie@gmail. 	com <u>[</u> .com com		3	
 willie@gmail. jenny@gmail leslie@gmail. 	.com	+	3	
 willie@gmail. jenny@gmail leslie@gmail. 	.com	+	3	

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 <u>User Roles and Permissions</u> 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.

Orta!	⊕ Create	Q Search	🎸 Free Trial: 57 days left) 📧 Test 🛛 🗘 😡 🗸
슈 Home ☑ My Tasks 럼 Calendar	Projects 2 P1 2 Out of the parallel		Add Task
Activity Projects P1	Duplicate Descr Export as .CSV Test Delete	Enit Project × Project Name * Create website for BBS I Description Create some different elements and use dark themes. I	
	Members Q. Search Name	Update	Re inste Role Owner ~
		U	Member ~
Submit Feedbacks			

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 <u>User Roles and Permissions</u> 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.

Orta!	(+) Create	Q Search	🛠 Free Trial: 57 days left) 📧 Test 🛛 🗘 🕅 🗸
슈 Home My Tasks Calendar S Activity	Projects 2 P1 Ow Edit Details Duplicite 3		Add Task
Projects P1	Test Deiete	Duplicate Project × Project Name * Copy of P1 O by duplicating, project description and all members will be cloned. Create by	
	Members Q Search		R- Invite
	Name	Email	Role
	HV You		Owner ~
	M		Member ~
Submit Feedbacks			

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.

Orta!

Orta!	+ Create
Home	Projects
My Tasks Calendar	Copy of P1 : Overview Tasks
Projects	Description
Copy of P1	Test
•	

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 <u>User Roles and</u> <u>Permissions</u> 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.

Orta!	⊕ Create	Q. Search	🔗 Free Trial: 57 days left) 📧 Test 🛛 🗘 🔫 🗸
Home My Tasks Calendar Activity Projects	Projects P1 2 Ove Edit Details Duplicate		Add Task
	Test Delete	Delete Project × By confirming the deletion, all associated data and files in the project will be permanently deleted. Please note that this action cannot be undere at this time.	
	Name	Email	Role
	W You		Owner ~
	M		Member ×
Submit Feedbacks			

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.

Orta!	⊕ Create	Q. Search	🞸 Free Trial: 57 days left) 📧 Test 🛛 🏳 🗰 🗸
 Mome ✓ My Tasks Calendar ③ Activity 	Projects P1 : Overview Tasks		Add Task
Projects	Description		
	Test	Leave from Project × Currently, you are unable to have the project: Flease taxaffer your • • To change convertely, please clease grad. • Clear • Zwart •	Role Owner 3 (* Laborizon Reget
 Submit Feedbacks 			

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.

Project

Orta!

Change Project Ownership	\times
Select the member, *	
John Jacob	F
Make as Project Owner	
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.

Orta!	⊕ Create	Q, Search	🛠 Free Trial: 57 days left 🛛 TE Test 🛛 🗘 🦷	v ~
 G) Home ✓ My Tasks ☐ Calendar ③ Activity 	Projects P1 : Overview Tasks		Add Tas	k
Projects PI	Description Test	Set as Manager × Are you sure you want to change the role to manager for this member? Image: Steven Volks		
	Members Cauch Name Por You Steven Volks	Ves, Confirm Email	Role Couner ~ Member 3 Set as Manager Remove from Project	te
Submit Feedbacks				

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 <u>User Roles and Permissions</u> table.

Orta!

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.

Orta!		Q. Search	🛠 Free Trial: 57 days left 📧 Test 🛛 🗘 时 🗸
 ♠ Home ☑ My Tasks ➡ Calendar ④ Activity 	Projects P1 : Overview Tasks		Add Task
Projects	Description Test	Leave from Project × By confirming, you will remove from the project and don't have any access in the furre.	ę
	Members Name 100 You 100	Confirm Leave	4 Ar Invite Role Member 3 C* Leave from Project
Submit Feedbacks			

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



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.

Orta!	Create	Q, Search	🛠 Free Trial: 57 days left) 📧 Test 🛛 🗘 🔫 🗸
 M Home My Tasks Calendar Activity 	Projects P1 : Overview Tasks		2 Adrītak
Projects P1	Description Test		
	Members Q Search		R- Invite
	Name	Email	Role
	You You		Owner 🗸
	DM		Member 🗸
E Submit Feedbacks			

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.

Add Task		\times
Task Name *		
T1		
Project	ы 3	
Assignee	HV Ha V . X	~
Due Date	Mar 20, 2025	=
Priority	() Low	
Description		
Heading 🔻	B <i>I</i> <u>∪</u> ⊨ ≕ ⇔	
Test		
4	스 Drop files here or click to upload.	
	Create 👆 5	

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.

Orta!	⊕ Create	Q. Search			💠 Free Tr	ial: 2 days left 🛛 🖁	ha 🗘 HV -
Orta!	Create Projects P1	Q. Search Task ID: 1010010 Details Comments Task Name Adda New Design for Webpage Project PI Assignce © II	Status Conserved for	2 Priority © Lower	Last Updated Mar 18, 2025 5:59 PM	at: 2 days left (H	ha C HV Add Task Created On Mar 18, 2025 5:59 PM Mar 18, 2025 5:59 PM
	U	Law operations 650 PM Mar 18, 2225 650 PM Description Test	Vou	Consol of Mar 18, 2025 5:59 PM			
			No files attached. <u>Attach a file</u>				

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.

Orta!

Tack Name *		
Add a New E	Design for Webpage	
Project	P1	
Assignee	🚺 Is e × 🛕 Bessie Cooper 🔏	~
Due Date	HV tech.com	
Priority	1) Low	
Status	New	
Description		
Heading •	B I <u>U</u> ⊨ ≔ ⇔	
Test		
	쇼 Drop files here or click to upload.	

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 <u>User Roles and</u> *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.

Edit Task							:
Task Name *							
Prepare Conter	nt for Mobile Design						
Project	Demo						
Assignee	HK	×	BE	×	BM		× ~
Due Date	Jan 17, 2025						Ē
Priority	🕐 High 🗸 🗸]					
Status	① None						
Description	🕐 High						
Heading 🝷	() Medium	≔	Ð				
Type your descr	① Low						
						2	
	🖒 Dro	op file	s here or cli	ck to up	load.		
			Update	շիս			

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 <u>User Roles and Permissions</u> 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.

Orta!		Q Search			🗳 Free Tr	ial: 2 days left	HA ha D HV Y
Orto!	Create Projects P1 : Overview Tasks Riter by Status: All an New (2) Task ID Name 101001 Make Changes to Mobile Der 101002	Compared Search Task ID: 1910010 Details Compared Took Harne Took Harne Took Harne Project Pr P Add a New Design for Webpage Project P Due Dote Mar 18, 2025 Last Updated	2 Secure Created By To files strached, <u>Attach a file</u>	Priority O Low Created On Mar 18, 2025 559 PM	Last Updated Mar 18, 2025 6:00 PM	Created By IV IV IV IV IV IV	Add Task Created On Mar 18, 2025 5:59 PM Mar 18, 2025 5:59 PM
E Submit Feedbacks							

Figure 24 Comments Tab

- 2. Comments tab:
 - Select the comments tab.

Orta!



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.

Orta!	+ Create			🛠 Free Trial: 4 days left 🛛 HA ha 👘 🗘 🕂 🕂
A Home Hy Tasks Calcolor Activity Projects P1 D 1	My Tasks Assigned to me Created by me Filter by Status: All (2) • New (2) • Inprogres Task ID Name 1010010 Add a New Design for Webpage Make Charges to Mobile Design 1	Task ID: 1010010 Details Converts W H H, have completed the Task. Convert 1 png d Sodar 89 College of the College of the	Image: Control of the second	Last Updated Created On Mar 18,2025 6:00 PM Mar 18,2025 5:59 PM Mar 18,2025 5:59 PM Mar 18,2025 5:59 PM
		Understood	460 18, 2023 0740 PM	
Submit Feedbacks		B I U E E co	Post comment	

• Click the **Edit** icon to open the comment box.

Figure 54 Edit Icon

Orta!

Task ID: 1010010	
Details Comments	
HV	Mar 18, 2025 07:40 PM 📋
B I ∐ ⊫ ≡ ⊜	
Hi, I have completed the Task.	
comment 1.png 50.08 KB	Cancel Save Changes
	6



- 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.

Orta!	⊕ Create	Q Search			💠 Free Tr	ial: 2 days left H4	ha 🛛 Q 🖿 -
 G Home ✓ My Tasks Calendar 	Projects P1 :	Task ID: 1010010	2	K D V D ×			Add Task
 Activity Projects P1 	Overview Tasks Filter by Status: All (2) • New (2) Task ID Name	Task Name Add a New Design for Webpage Project P1 Arcience			Last Updated	Created By	Created On
100	1010010 Add a New Design for Webpa	U N	d Status	Priority	Mar 18, 2025 6:00 PM	HV	Mar 18, 2025 5:59 PM
	1010009 Make Changes to Mobile Des	Mar 18, 2025	New Created By	 Low Created On 	Mar 18, 2025 5:59 PM	HV	Mar 18, 2025 5:59 PM
	•	Mar 16, 2023 600 PM	You	mar (6, 2023-3-9 PM			
		Files	No files attached. <u>Attach a file</u>				

Figure 24 Comments Tab

- 2. Comments Tab:
 - Select the **Comments** tab.

Orta!

Task ID: 1010010		
Details Comments		3
HV Hi I have completed the Task		Mar 18, 2025 07:40 PM 🖄 🖟
comment 1.png		4
HV		Mar 18, 2025 07:40 PM
Okay, got it.	Are you sure you want to delete this comment?	
HV	Cancel Delete	Mar 18, 2025 07:40 PM
Understood		
HV	U	Mar 18, 2025 07:40 PM
Noted		
	Θ	
Type your comments		
🖉 Add File		Post comment :

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.

Orta!	⊕ Create	Q Search			📌 Free Ti	rial: 2 days left 🛛 🖁 🗛	ha 🛛 🗘 🐨 🗸
A Home	Projects	Task ID: 1010010		2 200	×		
My Tasks Calendar	P1 :	Details Comments					Add Task
D Activity	Overview Tasks	Task Name Add a New Design for Webpage					
Projects	Filter by Status: All (2) • New (2)	Project P1					
P1	Task ID Name	Assignee			Last Updated	Created By	Created On
.	1010010 Add a New Design for Wet	Due Date	Status	Priority	Mar 18, 2025 6:00 PM	W	Mar 18, 2025 5:59 PM
	1010009 Make Changes to Mobile D	Desi 🗎 Mar 18, 2025	New	 Low 	Mar 18, 2025 5:59 PM	HV	Mar 18, 2025 5:59 PM
	0	Last Updated Mar 18, 2025 6:00 PM	Created By	Created On Mar 18, 2025 5:59 PM			
		Description					
		Files					
			No files attached. At	ach a file			

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 <u>User Roles and</u> <u>Permissions</u> 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.

Orta!	⊕ Create	Q Search			💠 Free Tr	ial: 2 days left HA	ha 🛛 🗘 🔫 -
Home	Projects	Task ID: 1010010			×		
My Tasks Calendar	P1 :	Details Comments		U			Add Task
D Activity	Overview Tasks	Task Name Add a New Design for Webpage					
Projects	Filter by Status: All (2) • New (2)	Project					
P1	Task ID Name	Assignee			Last Updated	Created By	Created On
wo 🔑	1010010 Add a New Design for Web	pa, 1 🕐 🛍	bd		Mar 18, 2025 6:00 PM	HV	Mar 18, 2025 5:59 PM
	1010009 Make Changes to Mobile E	Due Date lesi 🗂 Mar 18, 2025	Status	Priority () Low	Mar 18, 2025 5:59 PM	HV	Mar 18, 2025 5:59 PM
	1	Last Updated Mar 18, 2025 6:00 PM	Created By W You	Created On Mar 18, 2025 5:59 PM			
	1.00	Description					
		Test					
		Files					
			No files attached. Att	tach a file			
 Submit Feedbacks 		L					

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.



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 <u>User Roles and Permissions</u> 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.
---	---------------------------

Orta!	⊕ Create			💠 Free Tri	al: 2 days left 🛛 🗛 hamlyglob 🛛 💭 😡 🗸
Orta!	Create Projects P1 : Overview Tasks Filter by Status: All (0 • New (0) • ing Task ID Name 1010010 Add a New Design for Webpage 1010009 Make Changes to Mobile Design	Q: Scarch Task.iD: 100016 Detail: Connects Task Name Adda Anew Ordege for Wridpage Project Pri Augusto Project Pri Connect Offy Mar 18, 2025 660 PM Description Test	Set Reminder for Yourself When should the reminder be sort? * Setect: Cancel Gr Remonder Princip © Law Crasted On Mar 18, 2025 559 PM	Last Updated Mar 18, 2025 6:00 PM Mar 18, 2025 5:59 PM	4.2 duys left (K) hamiyglob () (K) v Add Task Created By Created On (1) Mar 18, 2025 5:59 PM (1) Mar 18, 2025 5:59 PM
Submit Feedbacks		Res rasfiet	attached <u>Attach a file</u>		

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.



Set Reminder for Yourself	L.
When should the reminder be ser	nt? *
Select	🗸
🐸 Later Today Mar 1	9, 2025, 12:31 PM
🔅 Tomorrow	Mar 20, 2025
🙆 On the Due Date	Mar 18, 2025
📋 1 Day Before Due Date	Mar 17, 2025
Choose Date & Time	

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.

Task





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.

Task ID: 1010010	C 🗆 🦉 🕮 🗙
Details Comments	Edit Reminder Cancel
Task Name	When should the reminder be sent? *
Add a New Design for Webpage	😂 Later Today Mar 19, 2025, 12:31 PM 🛛 🗸
Project P1	Delete 5 Update
Assignee	
🚺 Isł ied	
Due Date Are you sur Are you sur Last Updated Mar 18, 2025 6:00 PM Description Test	re you want to delete the reminder ? Low Cancel Delete Trou Tou Tou

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.
- Otel
 Image: control
 Image: control</
- 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.

Add Event		×
Event 1		
🗎 Mar 21, 2025 – Mar 21, 2025	© 11:30 AM to © 12:0	0 PM
🗆 All day	6	
C Daily	•	بأآس
O Never Ends	2025 🛱	\mathbf{O}
Add Participants	4	ĥ
HV H Ve Organizer		C
BB Ba i		
RT Ra Th an		
◎ Texas	5	
BIU ⊫≣ ⊜		
Test Event		
Attach file		
comment 1.png 50.08 KB	8	ŵ
	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.

Orta!	① Create					🞸 Free Trial: 3 days left	HA hamiyglob 🗋 😡
 My Tasks My Calendar 	Calendar K March 2025	Today					Add Event
3 Activity	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Projects P1			35.7	-25	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	28	1
	2 3 Event 1 2 71 March 2015, 11:30 AM - 12:00 PM C Report diffy well March 32, 2025 9 Teas:			17:50 PM 1, 2025	~D	7	8
	*	10	Participants (3) You Organizer Bai Bai			14	15
	16	17	Description Test Event			• 11:00 AM Ever 1	22 0.11:30 AV (sere 1
	23 • 11.20 AM Event 1	24 # 11.20 AM Board, 1	Comment Long			28 • 11.20 AM Brent 1	29
	30	31					
🗩 Submit Feedbacks							

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.

Calendar



Edit Event ×
Event 1
☐ Mar 21, 2025 - Mar 21, 2025 ③ 11:30 AM to ③ 12:00 PM
All day
🛱 Daily 🛛 🗸
○ Never Ends ● Ends on Mar 28, 2025 🗎
Add Participants
Ha Ve Organizer
📅 Ra Th an 🛛 3 🍈
◎ Texas
B Z ⊻ ⊨ ≔ ⇔
Test Event - Edit Event
Cancel

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.

Orta!	① Create	٩	Search			💠 Free Trial: 3 days left 🛛 🔒	hamlyglob 📮 时 🗸
 A Home ✓ My Tasks ✓ Calendar 	Calendar K March 2025	Today					Add Event
3 Activity	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Projects P1		24	25	26	2 27 (2) 27 (2) 27	28	1
	2	3	Event 1 21 March 2025, 11:30 AM - 1 Repeats daily until March 28 0 Texas	12:00 PM , 2025	2	7	8
	9	10	Participants (3) You Organizer Ba Ba			14	15
	16	17	Description Test Event		1	e 11:30 AM Event 1	22 • 11:30 AM Event 1
	23 • 11:30 AM Event 1	24 • 11:30 AM Event 1	comment 1.png 50.08 KB			28 • 11:30 AM Event 1	29
	30	31				4	
E Submit Feedbacks							

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.

Orta!	⊕ Create		Q Search			💠 Free Trial: 3 days left	HA ha 🛛 🗘 时 🗸
 A Home My Tasks ☐ Calendar 	Calendar K March 2025 >	Today					Add Event
D Activity	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Sync with Google calendar
Projects P1		24	25	26	27	28	3 7
	2	3	Settings Profile Workspace Members Password Change and reset your account password	s Account & Integrations	Change Password	× 7	8
	9	10	Integrations Google Calendar Connect and export events from	Orta to Google Calendar.	Connect	14	15
	16	17	Delete an Account Deleting your account will remove all y Delete Account	our data and lose access from wor	rkspaces.	21 1:30 AM Event 1	22 • 11:30 AM Event 1
	23 • 11:30 AM Event 1	24 • 11:30 AM Event 1	25 • 11:30 AM Event 1	26 • 11:30 AM Event 1	27 • 11:30 AM Event 1	28 • 11:30 AM Event 1	29
	30	31				4	
Submit Feedbacks							

• 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.

Add Event	×		
Test Event 2			
Mar 20, 2025 - Mar 20, 2025 S 12:30 PM to O 11:00 PM			۲.
□ All day □ Daily D Never Ends ● Ends on Mar 21, 2025 音	~	Test Event 2 □ 20 March 2025, 12:30 PM - 01:00 PM □ Repeats daily until March 21, 2025	
Add Participants Harish Kumar Venugopal Organizer	~	 https://meet.google.com/uua-jcvo-bfm Participants (1) You Organizer 	Google meet link fetched automatically
B <i>I</i> ∪ ⊨ ⊨ ⇔		Description	
■ Meet Link Test		Meet Link Test	
Add Location Attach file	1		
Location left blank	ate		

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.

Orta!	Create	Q. Search			🛠 Free Trial: 3 days left 🛛 🖁	ha 🗘 HV -	
 A Home ✓ My Tasks ✓ Calendar 	Calendar March 2025 >	Today					🗄 Add Event
 Activity 	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Remove Sync with Google calendar
Projects P1		24	25	26	27	28	
	2	3 Profile Password Change an	Workspace Members Ac	count & Integrations	1	8	
	9	10 Integration	15 @hamlyglobaltech.com nected	14	15		
	16	17 Delete an A Deleting yo Delete Av	17 Delete an Account Deleting your account will remove all your data and lose access from workspaces. Delete Account				22 • 11:30 AM Event 1
	23 • 11:30 AM Event 1	24 • 11:30 AM Event 1	25 • 11:30 AM Event 1	26 • 11:30 AM Event 1	27 • 11:30 AM Event 1	28 • 11:30 AM Event 1	29
	30	31				4	
Submit Feedbacks							

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.

Orta!	🕀 Create	Q Search
 Home ✓ My Tasks ☆ Calendar ☆ Activity 	 ✓ Task È Project È Event Ø Invite Member 	View Profile →
Projects P1	Mar 19, 2025 Wednesday My Tasks Today Upcoming O	verdue

Figure 77 Create a Button

Create Button

Orta!

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.

Orta!	Crepte	Q Search	🛠 Free Trial: 3 days left 🛛 🙉 hamlyglob 📔 🗘 ໜ 🗸
A Home	Task		
 My Tasks Calendar 	Event View Profile	Add Task ×	
D Activity	You have task in project	Task Name *	Review Completed
Projects	Mar 19, 2025 Wednesday	Project P1	
	My Tasks	Assignee 🛛 🛛 Vei x	View all
	Today Upcoming Overdue	Due Date Mar 19, 2025	
		Priority O Low	
		Heading • B I U i≡ ⊞ œ	
		Test 1	
		3	
	Upcoming Events		All Events
		් Drop files here or click to upload.	
		≥ comment 1.png 50.08 KB	
		Create	
Submit Feedbacks			

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.

Orta!	+ Create	Q Search	Free Trial: 57 days left	TE Test 🛛 🖓 🚻 ~
Orto! MyTasks Calendar Activity Projects P1 @	Task Project Event If Workev 0 task in 1 project Mar 17, 2023 Monday	Q South Vere Frolle → My Tasks by Status Create Project x Project Name * - Create Website for BBS - Description - Create some different elements and use dark themes. - Invite Members Monv Members Monv	Review	Completed Completed View all
Submit Feedbacks	Upcoming Events	Austri Server Mison Jenvilson@tepLcom Leste Alexander Isoli@tepLcom Jenvilson@tepLcom Derosklyn Simmons simmons@tepLcom		All Events

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.

Create Project ×
Project Name *
Create website for BBS
Description
Create some different elements and use dark themes.
⊠ willie@gmail.com]
☑ jenny@gmail.com
☑ leslie@gmail.com
+
Create 🕁

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.

Orta!	(+) Create	Q Search	🛠 Free Trial: 54 days left 🛛 🗛 ha 💷 🛛 🗘 🕂 😾
Home My Tasks Calendar Calendar Projects Copy of P1 H	Task Project Event Vou have 1 task in 2 projects Mar 19, 2025 Wednesday	Add Event × Event 1 Mar 21,2025 - Mar 21,2025 © 11:30 AM to © 12:00 PM All day © Daily Q	Review Completed
PI ®	My Tasks	Never Ends Ends on Mar 28, 2025 Add Participanes 3 Image: Second	View all
	Upcoming Events	Arpch file 6 Comment 1,ong 7 So.08 KB Cancel Crose	All Events
Submit Feedbacks			

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.

Create Button



- 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.

Orta!	Create	Q. Search	Free Trial: 54 days left	HA ha 💷 🗛 🕺 🗸
Image: Control of the second secon	Contraction Contr	Vee Profie - My Tasks by Status New Uprogress Invite Members Project * 2 Project * 2 Projec	Review •	Completed
同 Submit Feedbacks		No events scheduled		

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**.

Orta!	(+) Create		Free Trial: 54 days left	HA ha Q (W)
A Home	Home			H. Ve Itech.com
✓ My Tasks Calendar	Hello Ha 🥄 ,	2 View Profile → My Tasks by Status		Switch Workspaces
D Activity	You have 1 task in 2 projects	Settings	×	Test
Projects	Mar 19, 2025 Wednesday	Proble Workspace Members Account & Integrations		Create Workspace
	My Tasks	James		© Settings
P1	Today Upcoming Overdu	Last Name * White		 ① Help & Support E+ Logout
		Your Photo HV [uplead Photo]		
		Job Title Department Project Manager Product Development		
		Email		
		harish@hamiyglobaltech.com		
	Upcoming Events			🛱 All Events
		No events scheduled		
Submit Feedbacks				

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**.

Orta!	⊕ Create	Q Search	💠 Free Ti	rial: 54 days left	HA ha Q 🕅 🙀 📶
A Home	Home				H. Ve Itech.com
My Tasks Calendar S Activity Projects P1	Hello Ha , Vou have 1 task in 2 projects Mar 19, 2023 Wednesday My Tasks Today Upcoming Overda	Vew rolle → New New New New New New New New	Inprogress X	Review	Itech.com Switch Workspaces Test Create Workspace Stettings User Guide Help & Support La Logout
		No events sched	uled		
Submit Feedbacks					

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**.

Orta!	⊕ Create Q Search	🔗 Free Trial: 54 days left 🛛 HA ha 💷 🗸 🕅
Home My Tasks Calendar Activity Projects P1 F	Home Hello Ha Wer Profile My Tasks by Status Vou have 1 task in 2 projects 1 1 My Tasks Profile Workspace Members My Tasks Profile Workspace Members Account & Integrations 2 Password Please note that by deleting your account, all account related data with e deleted, and you will lose access to and be removed from all other workspaces. Delete an account Cancel Low You Proceed 2 Deletes an Account Cancel Cancel Cancel Cancel 2 Deletes an Account Cancel Cancel Cancel Cancel 2 Deletes an Account Cancel Cance	Review Review
	Upcoming Events No events scheduled	🛱 All Events
Submit Feedbacks		

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 <u>Remove a Workspace Member</u>).



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.

Google	۹ 🗰 🕻	
Mail≁	←	Q ~
COMPOSE	Your account will be deleted within the next 30 days $\fbox{$N$}$	ō 0
Inbox	Aug 12 👌	•
Starred	Hello	
Important	We apologize for the inconvenience. We have received a request to delete your account with The Tym.	
Sent Mail	Your account data will remain in our database for 30 days from the start of the delete request. After this period, it will be permanently deleted, alon	g with any
Drafts	related workspaces, projects, and tasks. You won't have access to them in the future.	
 Categories 	If you wish to reactivate your account, please click the button below. Reactivate Account	
All	☉ This link will expire in the next 30 days.	
Deleted Messages	Thank you for using The Tym.	
More▼	If you did not take this action, error or have any questions, please contact support at support@thetym.com .	
	Thanks,	
	S Reply A Forward	

Figure 88 Email Intimation

Google	Q	 O
Mail -	←	\$ -
COMPOSE Inbox Starred Important	Account deleted permanently Inbox ×	 ● ■ Aug 12 ☆
Sent Mail Drafts • Categories	Thank you for using The Tym.	
All Deleted Messages More↓	Thanks,	

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.

Orta!	(+) Create		😽 Free Tr	ial: 54 days left	HA ha
A Home	Home				W H Ve Itech.com
☑ My Tasks	Hello Ha ,	View Profile → My Tasks by Status	lancorrers	Benjaw	Switch Workspaces
3 Activity	You have 1 task in 2 projects		-		Test
Projects	Mar 19, 2025 Wednesday		\bigcirc		Create Workspace
•	My Tasks	2			© Settings
	Today Upcoming Overdue	Settings Profile Workspace Members Account & Integrations	×		 Help & Support Logout
		Password Change Password Change Password			
		Integrations Google Calendar Connect and export events from Orta to Google Calendar.	Connect	3	
		Delete an Account Deleting your account will remove all your data and lose access from wor Delete Account	kspaces.		
	Upcoming Events				All Events
		No events sched	luled		
E SUDITIL PEEDDACKS					

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.

Add Event	×		
Test Event 2			
Mar 20, 2025 - Mar 20, 2025 O 12:30 PM to O 01:00 PM			C ī ×
 All day ⇒ Daily O Never Ends ● Ends on Mar 21, 2025 ➡ Add Participants Ha Ve I 	~	Test Event 2 20 March 2025, 12:30 PM - 01:00 P Repeats daily until March 21, 2025 https://meet.google.com/uua-jcvo-l Participants (1) You Organizer	M Google meet link fetched automatically
B I U i≡ ≔ ⇔ ≅ Meet Link Test		Description Meet Link Test	
Add Location Attach file Location left blank Cancel Cancel Cancel	reate		

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.

Settings		×
Profile Worksp	ace Members Account & Integrations	
Password Change and reset y		Change Password
Integrations harish@hamlyg Connected Delete an Account Deleting your account Delete Account	Remove Sync × Are you sure you want to stop syncing events from Google Calendar? Cancel Yes, Remove t will remove all your data and lose access from workspaces.	Disconnect





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.

Orta!	(+) Create	Q Search	🔆 Free Trial: 54	idaysleft (HA ha 💷 🗘 🕅 🙀 📶
G Home	Home			H. Ve litech.com
✓ My Tasks ☐ Calendar	Hello Ha ,	View Profile → My Tasks by Status		Switch Workspaces
 Activity 	You have 1 task in 2 projects	New (1)	Inprogress Revi	ew 📧 ha tech.com 🗸
Projects	mai 13, 2023 Wednesday			Create Workspace
•	My Tasks	2		
P1	Today Upcoming Overdue	Settings Profile Workspace Members Account & Integrations	×	Help & Support
		Password Change and reset your account password.	Change Password	L* Logout
		Integrations Google Calendar Connect and export events from Orta to Google Calendar.	Connect	
		Delete an Account Deleting your account will remove all your data and lose access from work	spaces.	
		Delete Account		
	Upcoming Events			🗇 All Events
		No events schedu	uled	
Submit Feedbacks				

Figure 95 Change Password

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





Settings	×
Profile Workspace Members Account & Integrations	
Change Password	
Current Password *	
	Q
New Password *	
	Ø
Confirm New Password *	
	Cancel Update
Integrations	U
Aa 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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