Projects

The **Projects** module is where you create, organize, and manage project work for the selected tenant (e.g., **AUSTIN DURHAM (PERSONAL)**). You can view current projects, create new projects, and manage access, documents, and settings for each project.

Projects List

When you open **Projects**, you'll see a list view with:

- **Tabs:** `Active` / `Deleted` (to switch between live projects and deleted ones)
- **Search:** a search box (`Search projects…`)
- **Columns:** Project name, Type, Status

Filtering & Searching

- Use the `Active` / `Deleted` tabs to switch between project groups.
- Use `Search projects…` to filter by project name.

Opening a Project

Click a project name (e.g., **Project A**) to open its project view.

Creating a Project

1. Go to **Projects**.
2. Click **Create Project**.
3. Fill out the **Project Details** form:
    - **Project Name** (required)
    - **Type** (required; selected from a list during creation)
    - **Color** (required; hex value)
    - **Description** (optional notes/scope/extra info)
    - **Parent Project** (optional — used to create a sub-project hierarchy)

4. Review “Setup Steps” (describing areas you can configure later, like location and access).
5. Click **Create Project** to save.

Important: Once created, some fields (like “Project Type”) may be read-only in settings depending on your configuration. Choose the type carefully during creation.

Managing a Project

Project Navigation

Inside a project you’ll typically see tabs like:

- **Dashboard**
- **Documents**
- **Settings**

Use the **Back** link at the top to return to the project list.

Project Dashboard (Project Summary)

The project dashboard gives a high-level overview, including:

- **People With Access** (count and direct assignments)
- **Organizations** (inherited access groups)
- **Documents** (document count and folders)
- **Subprojects**
- **Basic Information**
  - Type
  - Created date
  - Status
  - Location status (e.g., “No location” if not set)
  - Description status (e.g., “No project description…” if empty)
- **Quick Actions**
  - Open Documents
  - Manage Access (takes you into project settings)
  - Open Settings (core project actions)

Use these cards and quick actions to immediately see what's configured and where work needs to happen.

Project Documents

The **Documents** tab lets you manage project files and folders.

Common tools:

- `Grid` / `List` view toggle
- Folder navigation (e.g., `Home`)
- `Actions` menu (for uploads/folder creation, depending on permissions)
- `Open Trash` to view deleted documents/folders

If the folder is empty, you'll see guidance to upload files or create a new folder.

Project Settings

Project settings is where you edit identity and manage access.

Details (Identity)

You can edit:

- Project Name
- Project Color
- Parent Project
- Description

Typical buttons include:

- **Reset**
- **Save Details**

> Note: Project Type may be read-only (depends on your configuration).

Access (Assignments)

Access includes:

- Adding organizations (inherited access)
- Adding users (direct access)

Assignments let you review direct assignments, inherited organization access, and effective access sources in one view.

Best Practices

- **Name consistently:** Use a naming convention (job number + short description) to keep search results clean.
- **Use parent projects intentionally:** Only create sub-projects if it improves reporting or access clarity.
- **Review access regularly:** Use the project dashboard’s counts and quick actions to spot missing access, missing documents, and empty structure.

Last Updated: June 10, 2026 (Managed by Bridge Platform Administration Team)

Revision #6
Created 2025-11-12 18:34:20 UTC by Admin
Updated 2026-06-11 00:52:02 UTC by Admin