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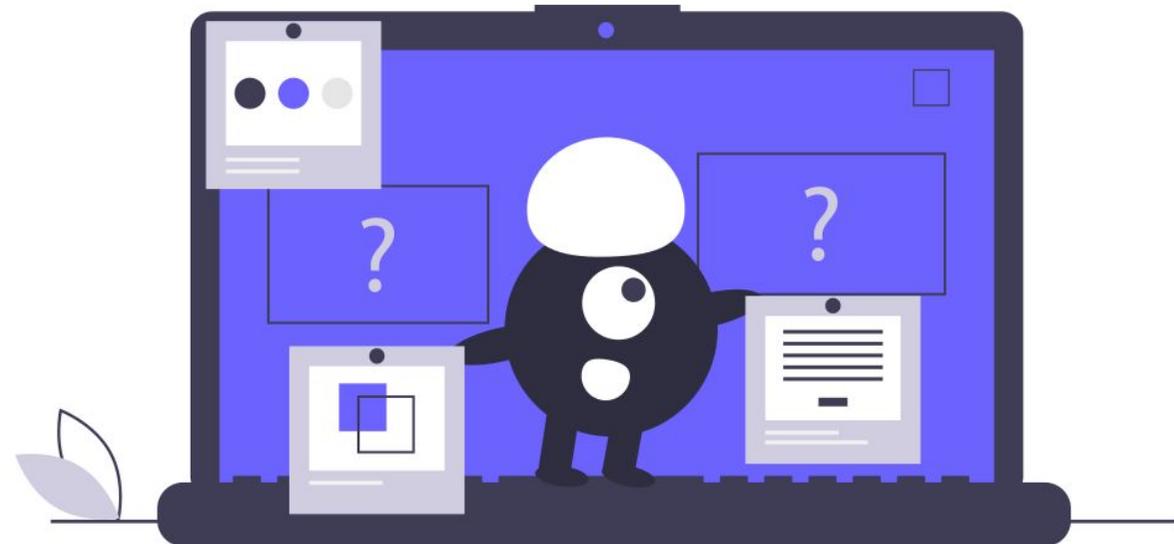
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USER GUIDE

GETTING STARTED



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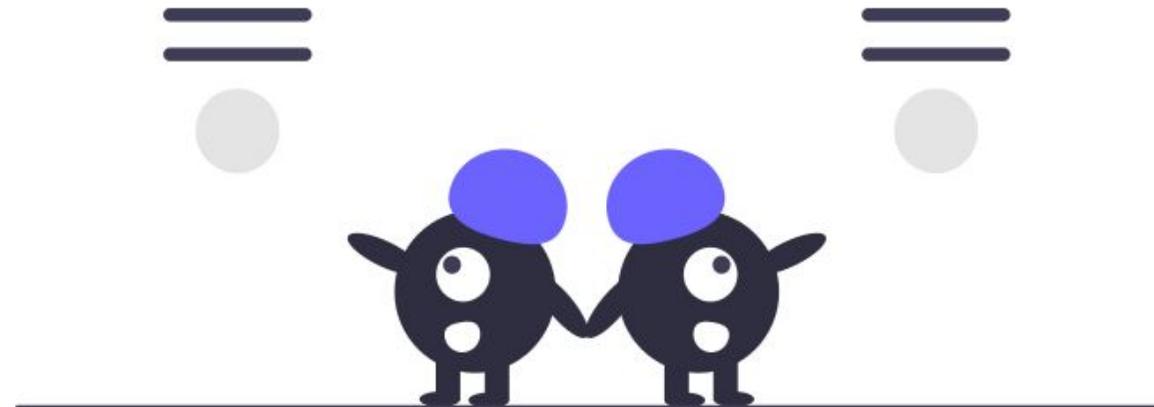
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Chapter 1.

OVERVIEW



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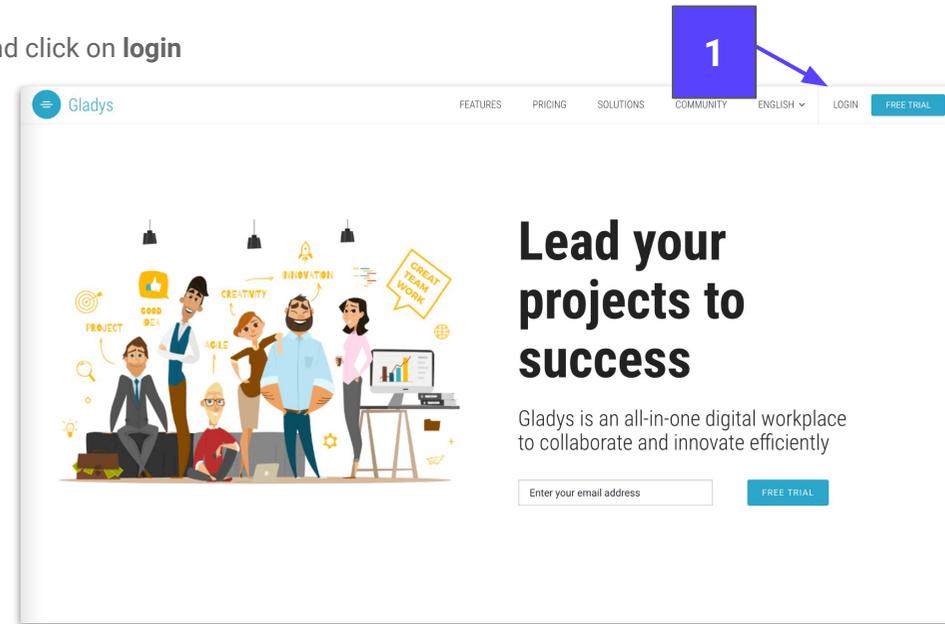
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Log in to Gladys

1. Go to gladys.com and click on **login**



2. Enter your **email address** and your **password**

Tip Gladys

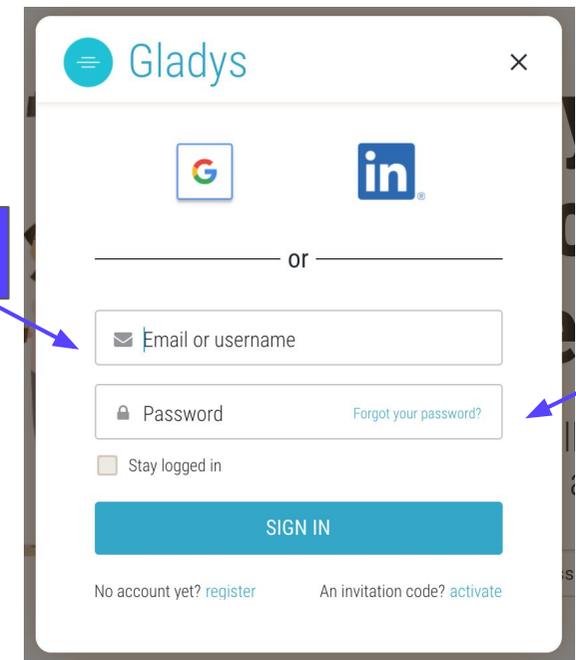
If you want to keep your session active, you can choose the box **Stay logged in**

Tip Gladys

In case you don't remind your password, click on **"Forgot your password"** and follow the recovery process to get a temporary one.

Tip Gladys

Log in to Gladys in **one click**, use the **Google** or **LinkedIn** authentication



My homepage

The homepage is splitted into 4 parts :

1. The **main menu**, it appears when you click on the icon  . Then, you can navigate between your workspaces, contacts, teams and calendar
2. **Header** contains all useful tools (search bar, bookmarks, chat), the contextual action menu and views
3. **Main page** is where to find workspaces and tasks
4. **Contextual panel** displays sharing setting, team members and options (filter, view mode..)

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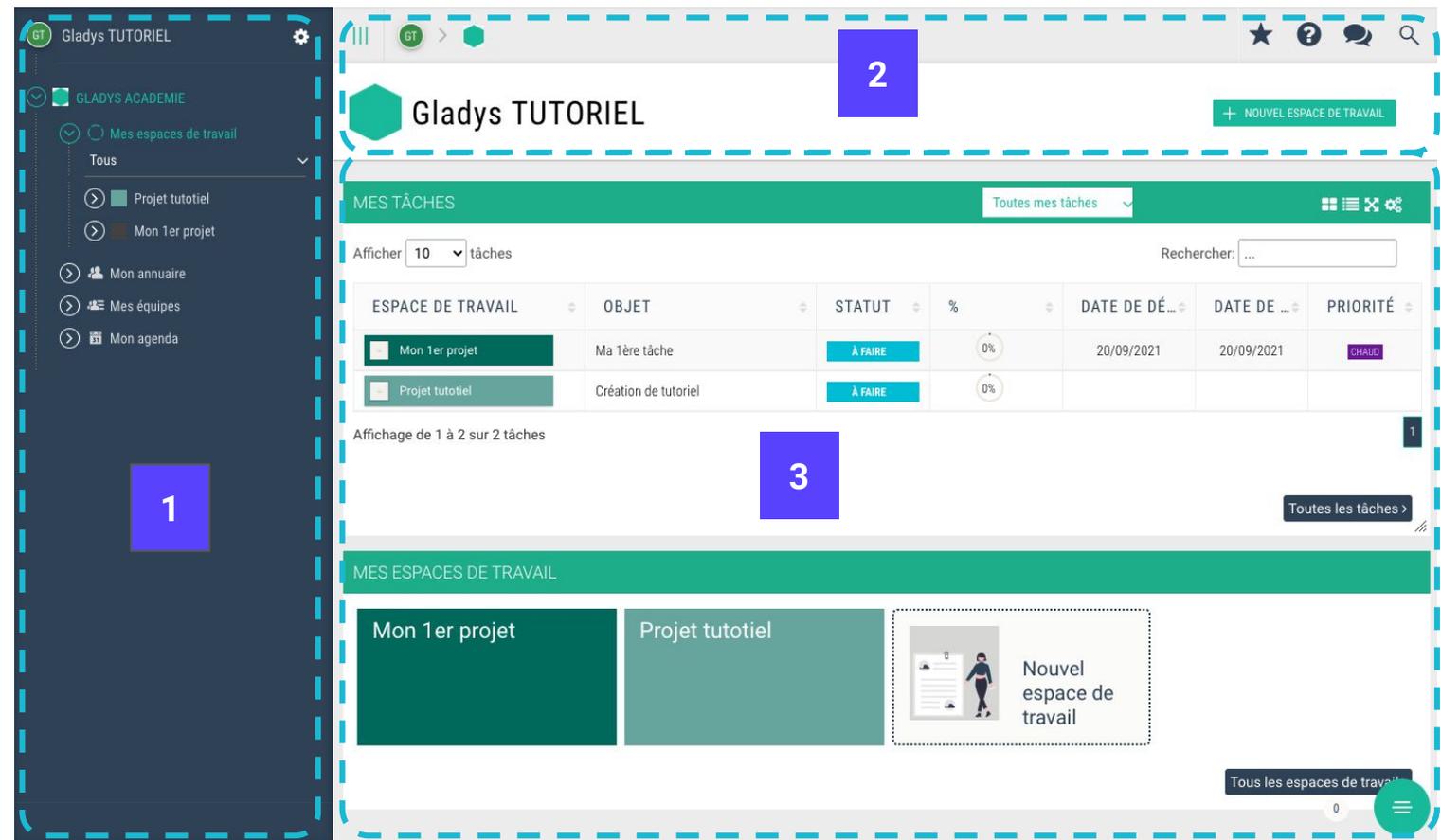
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The screenshot shows the Gladys homepage interface. A dashed blue box highlights the main content area. Three blue boxes with white numbers are overlaid on the interface:

- 1**: Points to the left sidebar (main menu).
- 2**: Points to the top header area.
- 3**: Points to the main task list area.

The interface includes a sidebar with a hamburger menu icon, a header with a search bar and user profile, and a main content area with a task list and workspace cards.

ESPACE DE TRAVAIL	OBJET	STATUT	%	DATE DE DÉ...	DATE DE ...	PRIORITÉ
Mon 1er projet	Ma 1ère tâche	À FAIRE	0%	20/09/2021	20/09/2021	CHAUD
Projet tutoriel	Création de tutoriel	À FAIRE	0%			

Navigate with the menu panel

The main menu allows you to navigate through Gladys :

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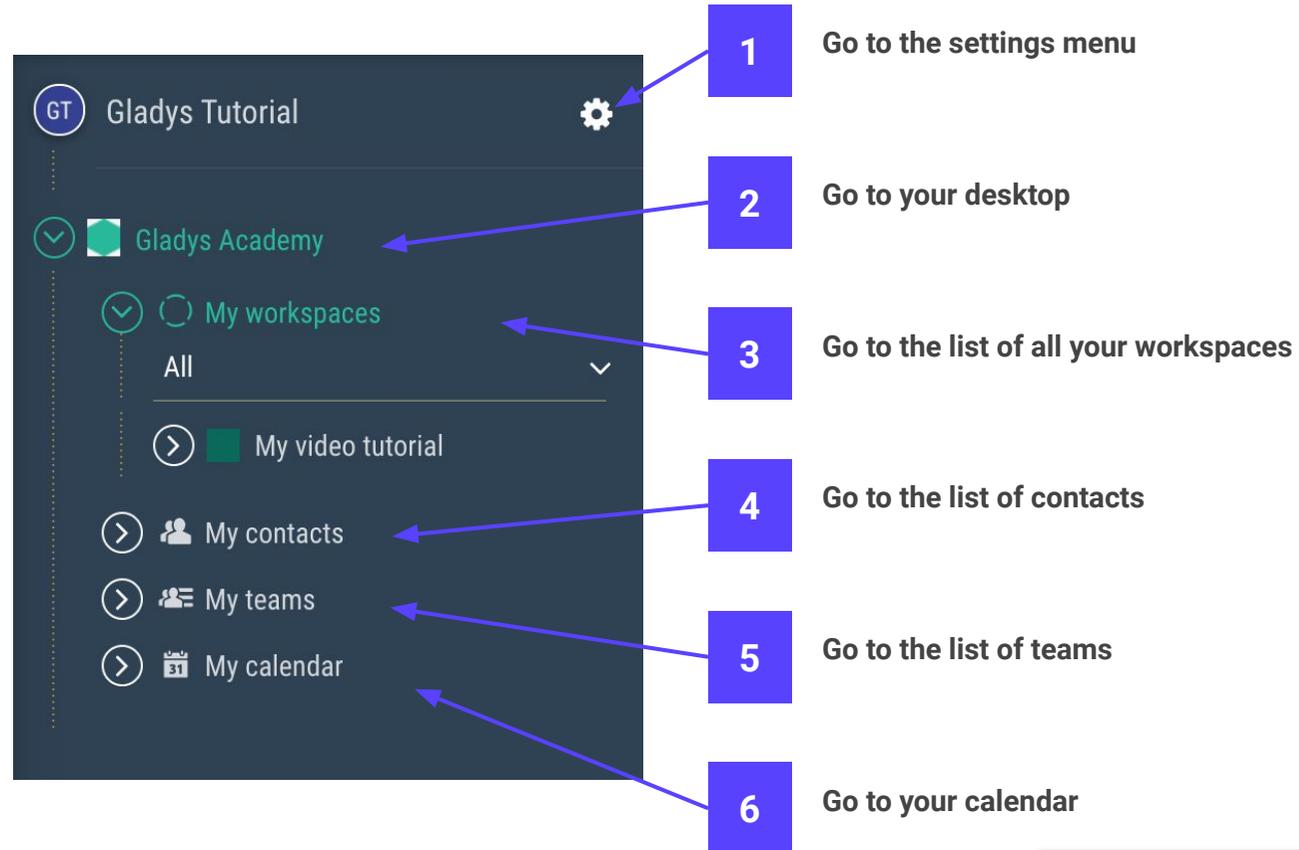
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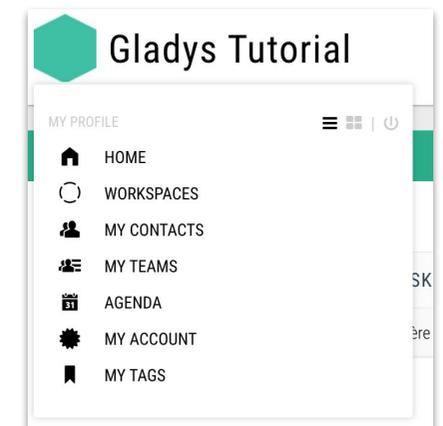
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Tip

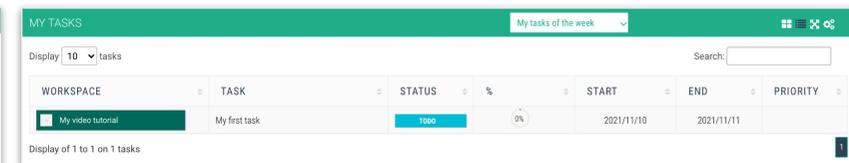
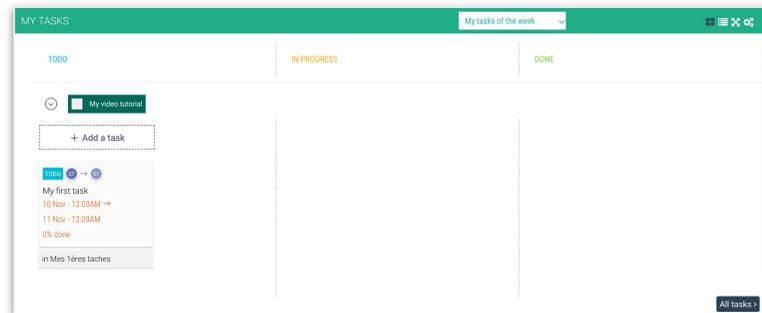
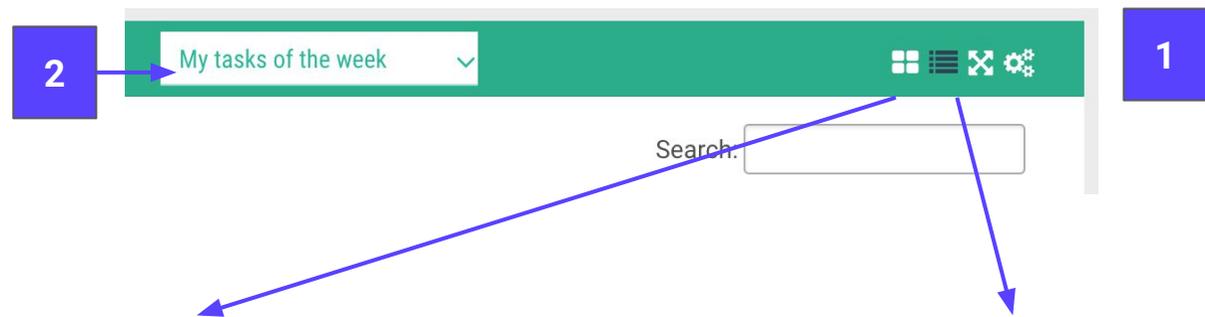
You can also open a pop up menu by clicking on the logo of your organization



How to use My tasks ?

The section **My Tasks** displays all the tasks assigned to you in the different workspaces.

1. When you hover over the section, icons appear allowing you to:
 - 1.1. Switch display mode between list and card view
 - 1.2. Open the section in fullscreen mode
 - 1.3. Go to the setting menu
2. Use the smart filter to display task overdue, next week task and more



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Tip Gladys

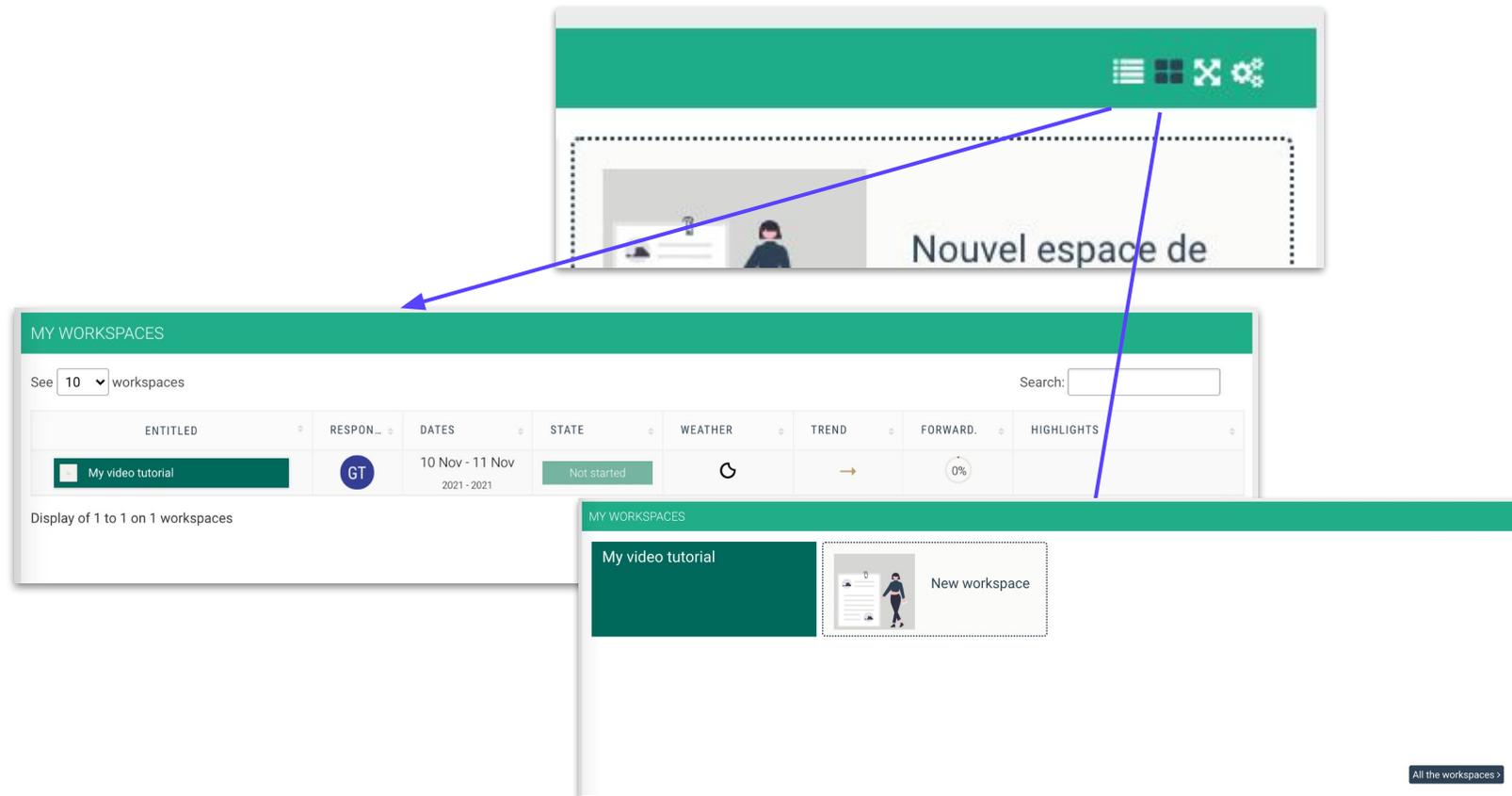
You can resize the section by clicking on the window corner



How to use My workspaces ?

The section **My workspaces** displays all the workspaces shared with you.

1. When you hover over the section, icons appear allowing you to:
 - 1.1. Switch display mode between list and card view
 - 1.2. Open the section in fullscreen mode
 - 1.3. Go to the setting menu



Tip Gladys

You can resize the section by clicking on the window corner

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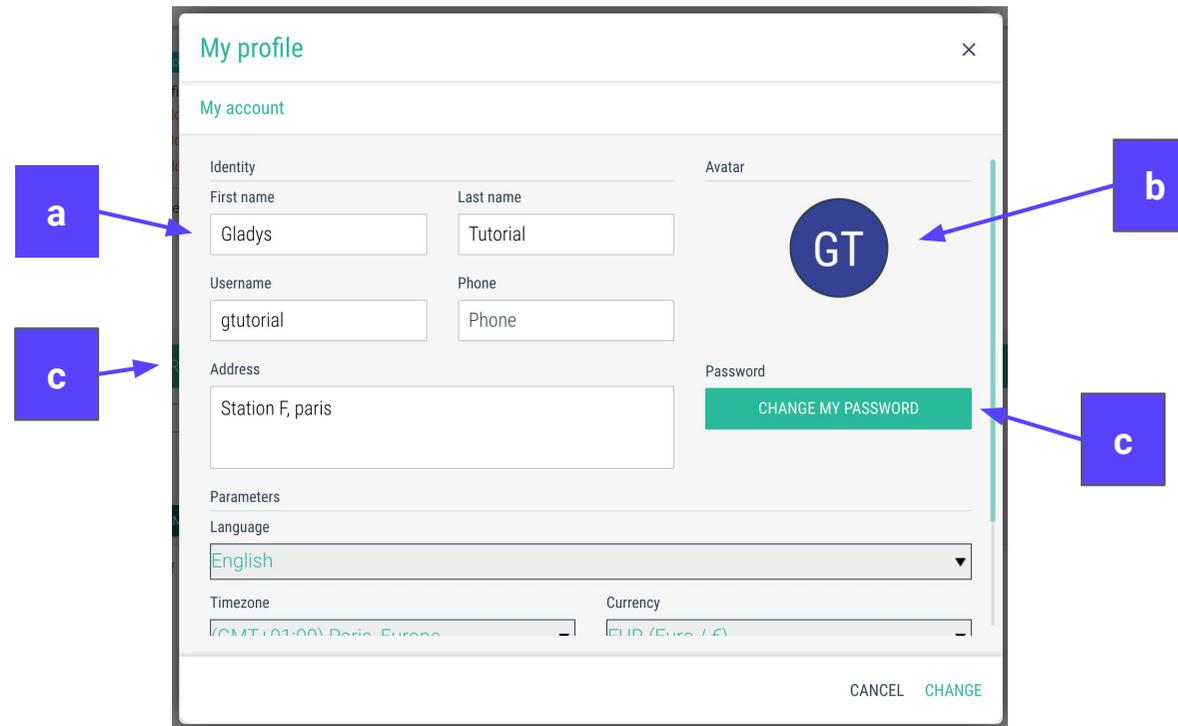
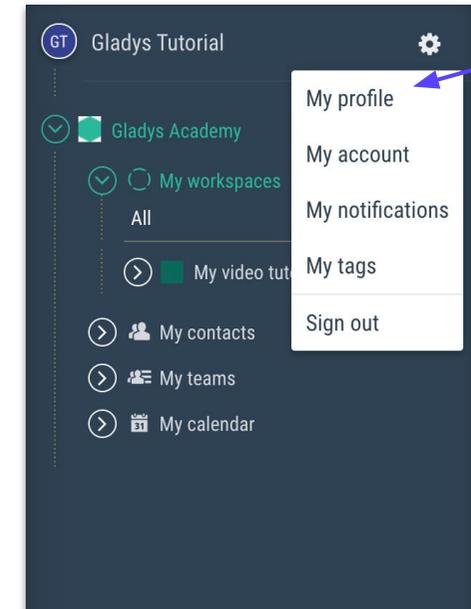
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User profile settings

1. Open the main menu by clicking on the icon 
2. Click on  to open the setting menu
3. Select **"My profile"** to access to your user settings
 - a. Modify firstname, lastname and username
 - b. Change your avatar
 - c. Change your password
 - d. Add an address if you want to get located



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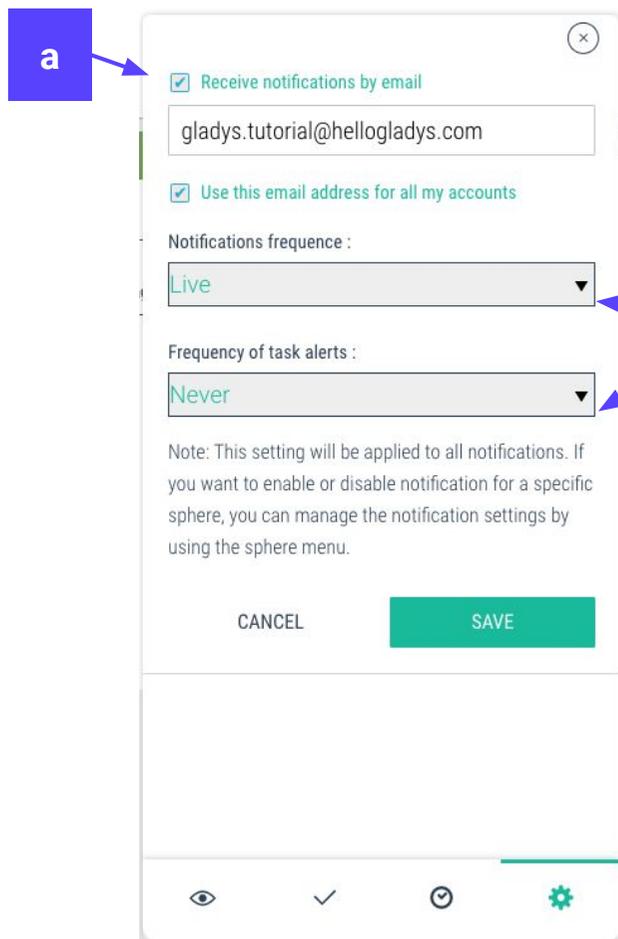
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Manage the notifications

1. Open the main menu by clicking on the icon 
2. Click on  to open the setting menu
3. Select **My notifications** to access the settings menu
 - a. Choose if you want to receive email notifications
 - b. Select the frequency : Direct or recap



a

Receive notifications by email

gladys.tutorial@hellogladys.com

Use this email address for all my accounts

Notifications frequency :

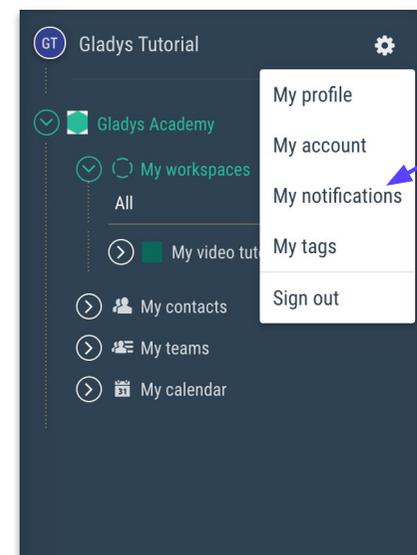
Live

Frequency of task alerts :

Never

Note: This setting will be applied to all notifications. If you want to enable or disable notification for a specific sphere, you can manage the notification settings by using the sphere menu.

CANCEL SAVE



Tip Gladys

Looking for a good start, you can use this settings “Daily recap” with “All days” and you will receive only 2 emails from Gladys.

Tip Gladys

No more email from Gladys, then, unbox the option to receive notification by email

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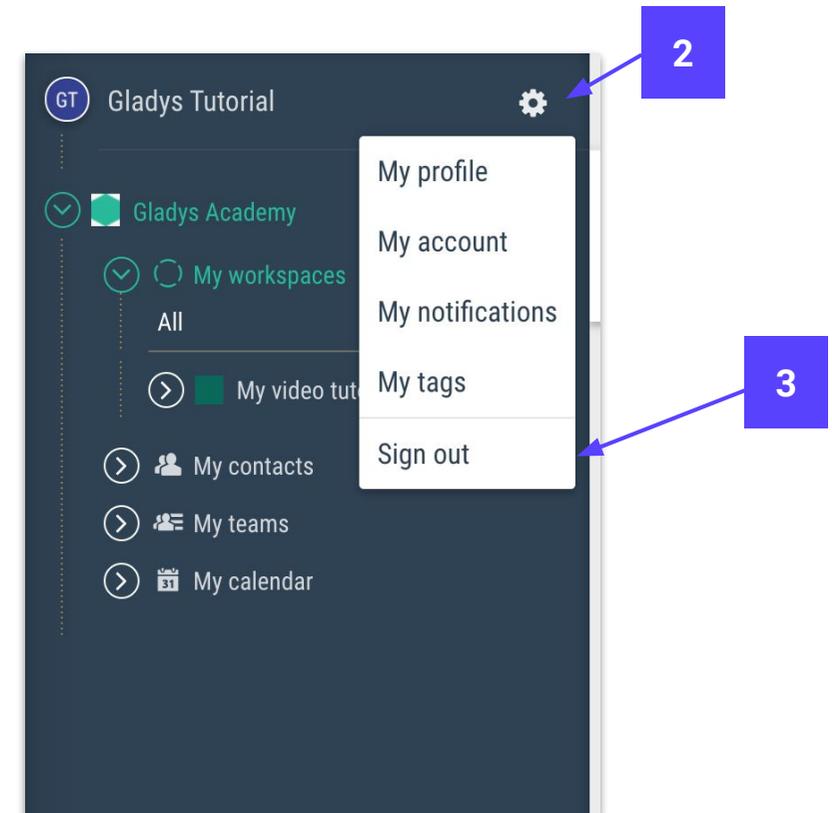
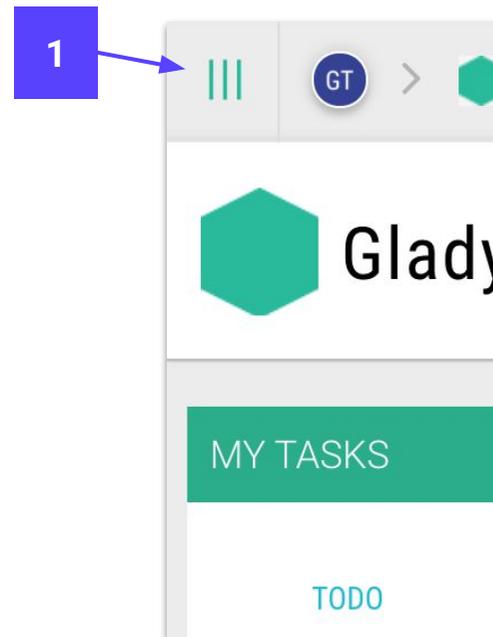
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How to log out of Gladys

1. Open the main menu by clicking on the icon 
2. Click on  to open the setting menu
3. Click on "Sign out" to leave the platform



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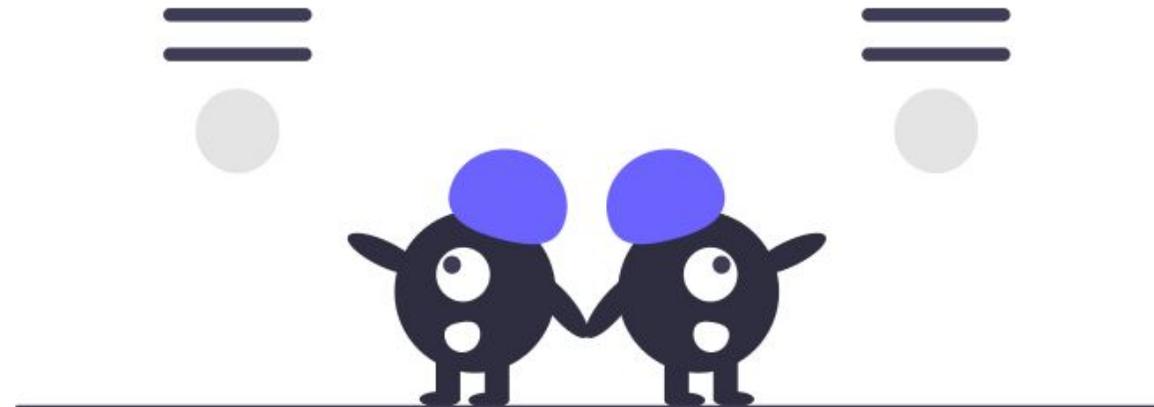
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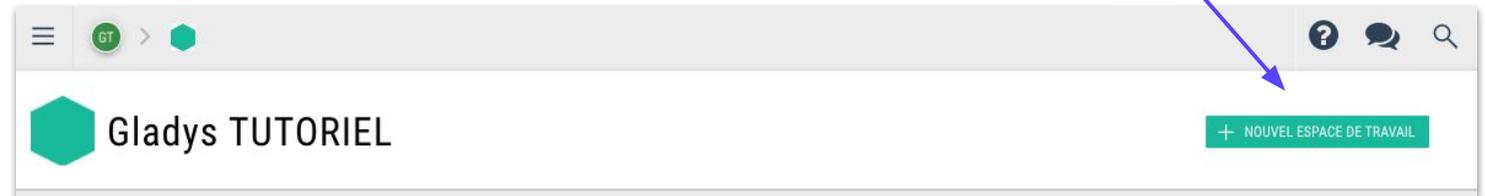
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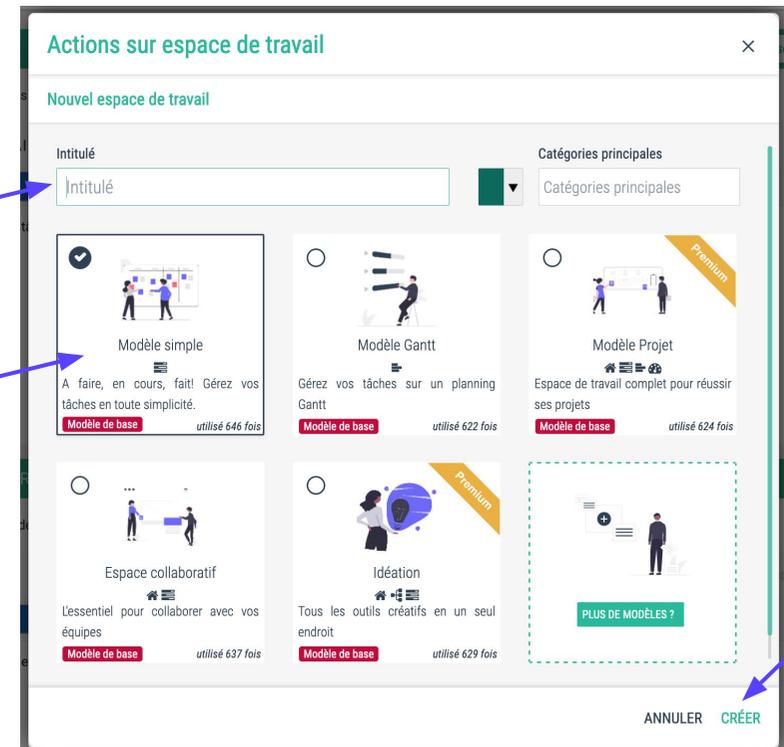


How to create my first workspace?

1. Go to the homepage and click on **+ ADD WORKSPACE**



2. Enter the name of your workspace
3. Select one of the model
4. Click on **CREATE**



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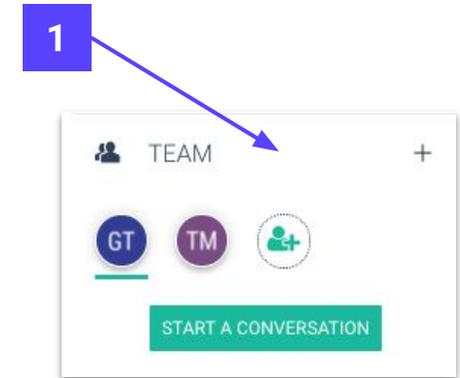
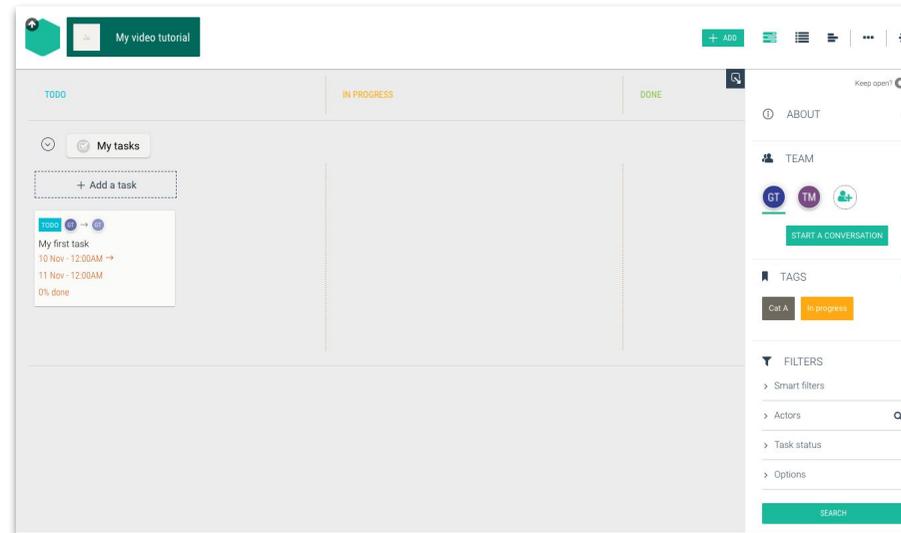
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Tip Gladys

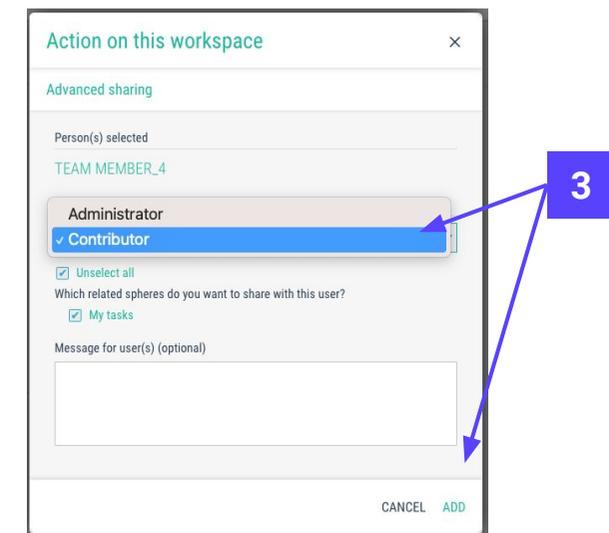
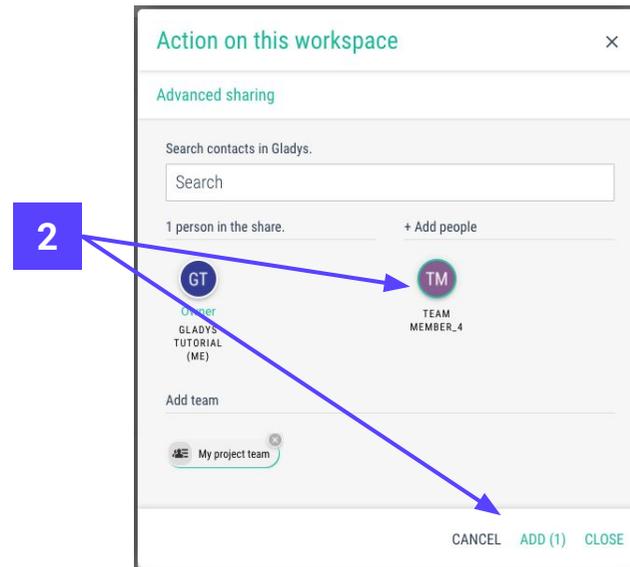
If you use portfolio management, you can choose directly your portfolio at the creation.

How to add a team member to my workspace?

1. Open the contextual panel  and click on **+** of the section **Team**



2. Select one or more members then click on **+ ADD**
3. Select the right for the project and click on **+ ADD**



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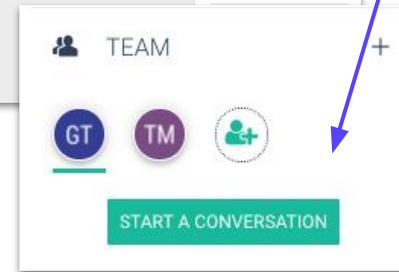
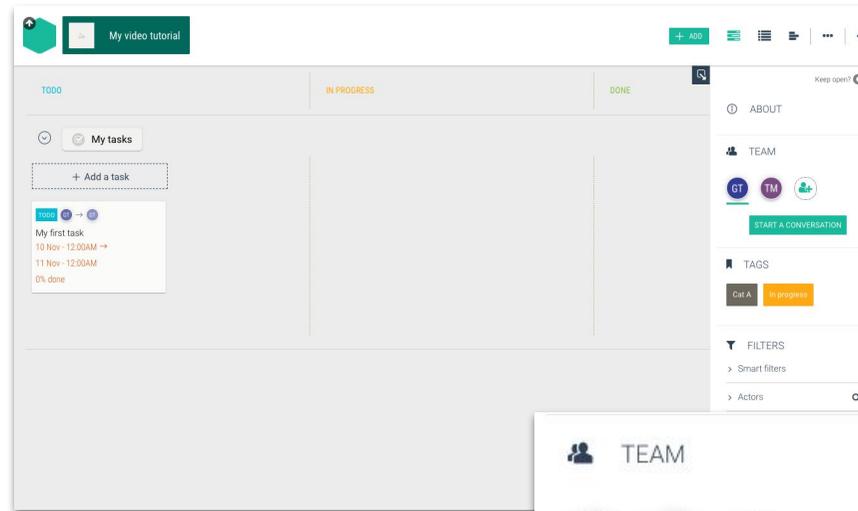
How to chat with my team?

Gladys allows you to discuss on a simple chat tool :

1. Open the contextual panel and click on **Start a conversation**
2. Write your message then send it 

Your messages can use files, emojis

You can **search** for information inside the thread by clicking on 



Tip Gladys

Gladys chat allows you to discuss on a project channel or directly with a contact or a group of contacts.

Tip Gladys

Button **Start a conversation** appears only if you have share your workspace with at least one team member.

How to manage my project notifications?

Project notifications allows you to stay informed on the task to be done or things that have been modified.

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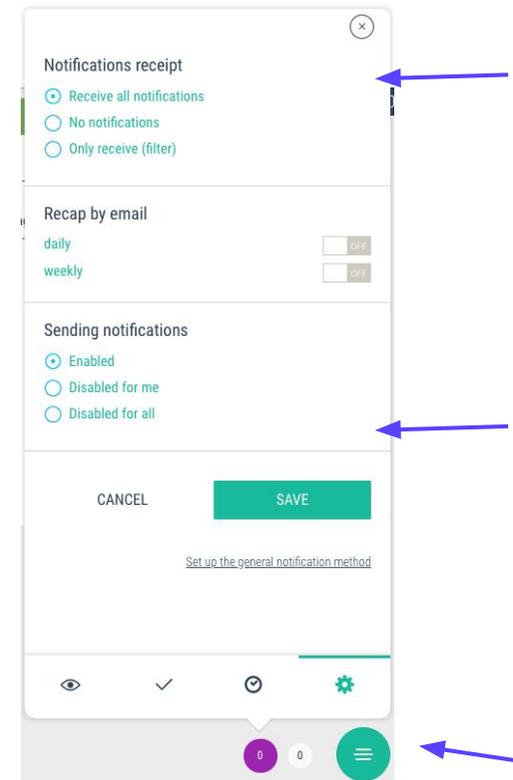
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- 1) Access to the notifications panel at the bottom right of the screen
- 2) Select the setting tab 
- 3) You can choose if you want to receive notifications from this workspace
- 4) You can choose if you want to receive recap notifications
- 5) If you plan to work on the gantt chart or think that is going to generate a lot of notifications, you can disable the notifications system during the operation.



Tip Gladys

The last section "Sending notifications" is available only for the Administrators of the workspace.

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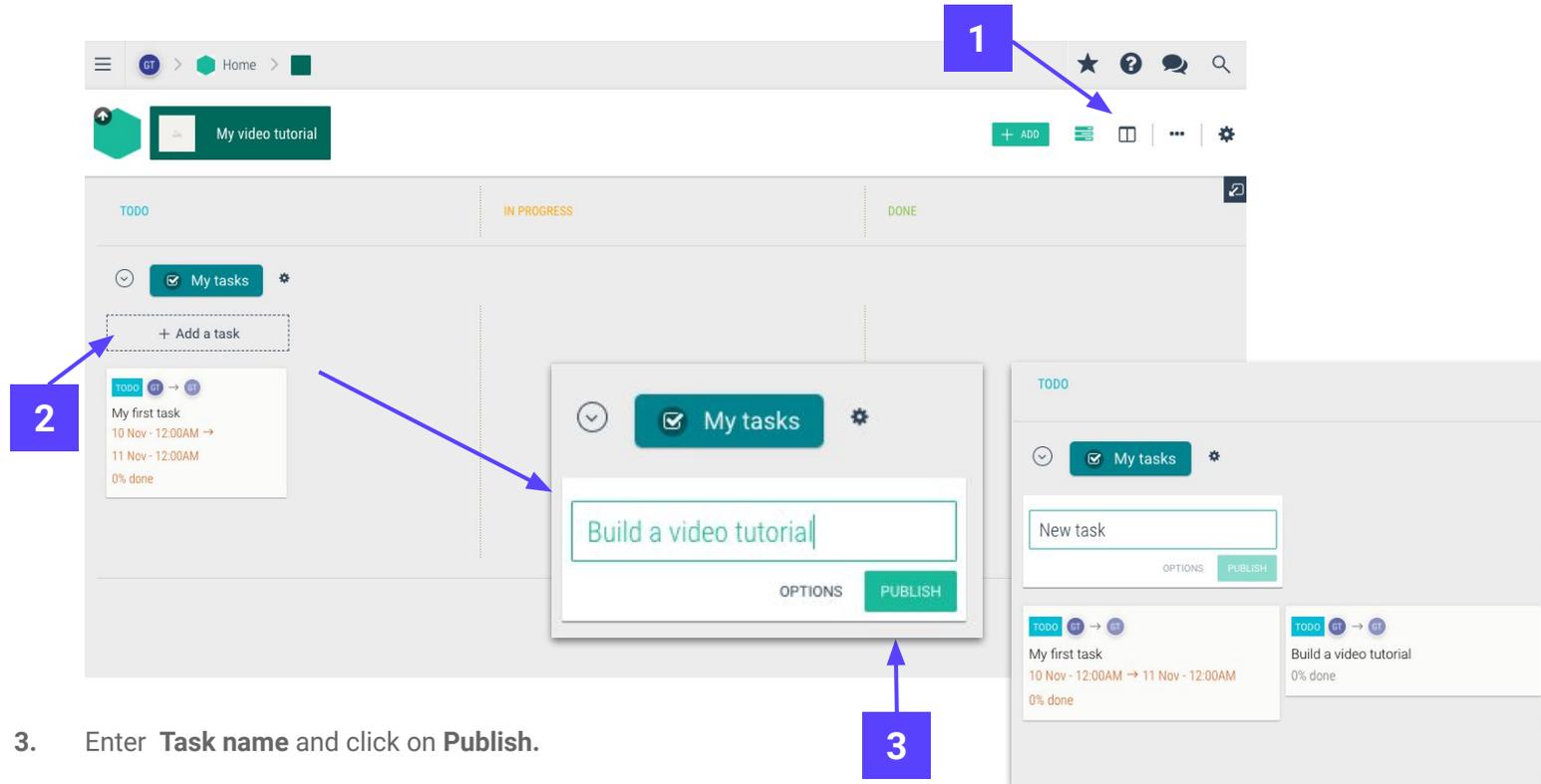
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How to create my first task

1. Go to the **Kanban view**  or **Board view**  in your workspace.
2. Click on **Add task** directly in the column



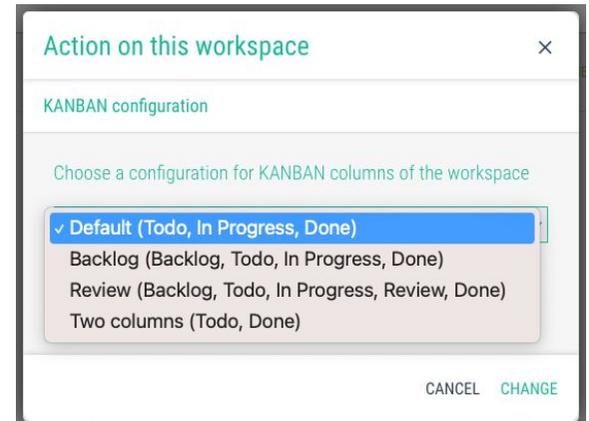
3. Enter **Task name** and click on **Publish**.

Tip Gladys

On the Kanban view, you can select different workflows by clicking on the header of the kanban.

Tip Gladys

Use the board view if you want to be free with the column management



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How to modify my task?

1. Click on the icon 

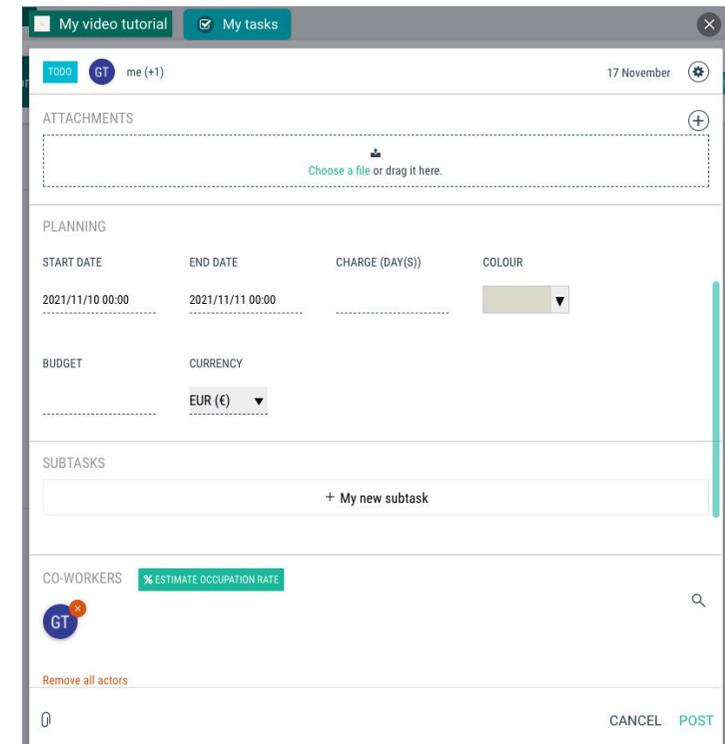


2. Fill up the detail description of your task in the different sections :
 - a. Section **Illustration** and **Description** to describe in detail your task
 - b. Section **Files attached** to add documents to your task
 - c. Section **Planification** to set up start and end date
 - d. Section **Subtasks** to add subtask to your main task
 - e. Section **Actors** to assign the task and sub-task
 - f. Section **Reporting** to inform the progress and the time consumed on the task

Tip Gladys

If you do not find the member to assign your task, you can still use the search by clicking on the icon 

Do not forget to **Post** your modifications, otherwise you task will stay in **draft mode**.



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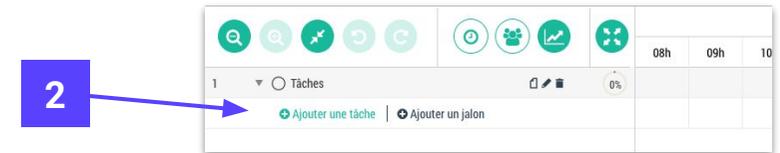
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How do i create a Gantt chart?

1. Go to the Gantt view by clicking on the icon 



2. Click on **Add task**



3. Enter the **Task name** then hit **Enter**.



4. Add the **task duration** (Number of days) or **draw it** directly on the gantt chart.



5. Assign task to a team member by clicking on **+** and select the actor to perform the task and click on **ADD**



Tip Gladys

Use the feature Undo/Redo   if you make a mistake on your gantt chart

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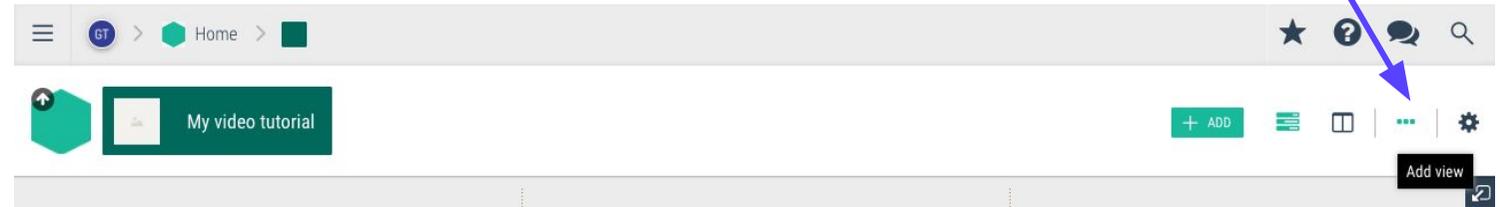
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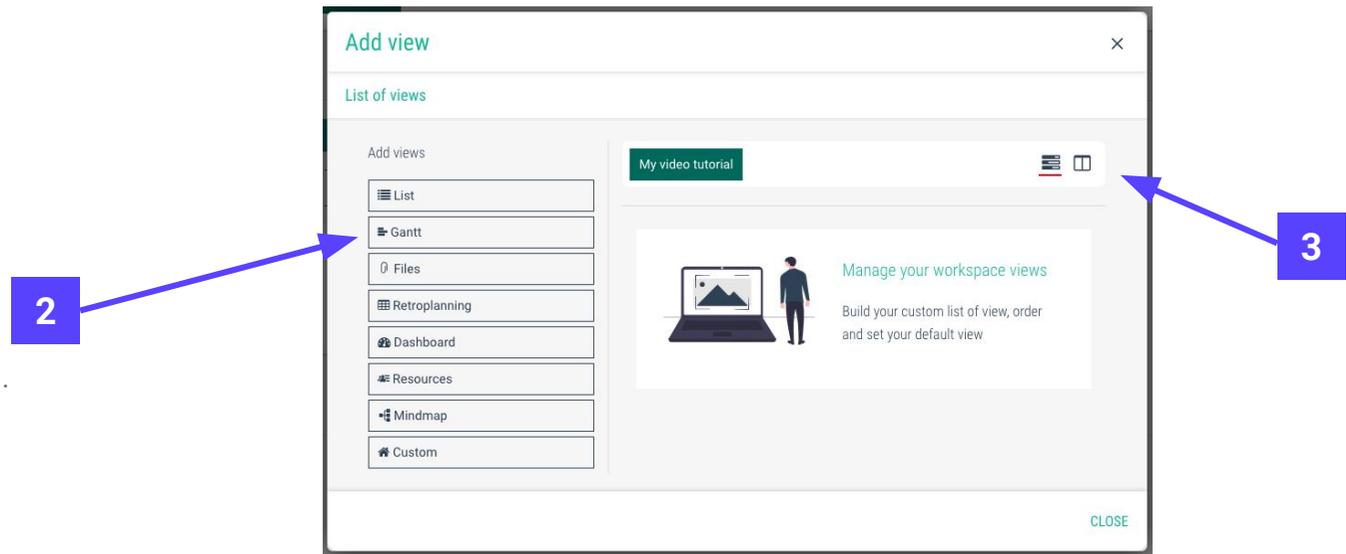
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Ho to manage views in my workspace?

1. Go to the right corner of the screen and **click on** 



2. **Select** the view that you want to add.
3. Click on **Add** then a new icon will be displayed aside the existing view



Tip Gladys

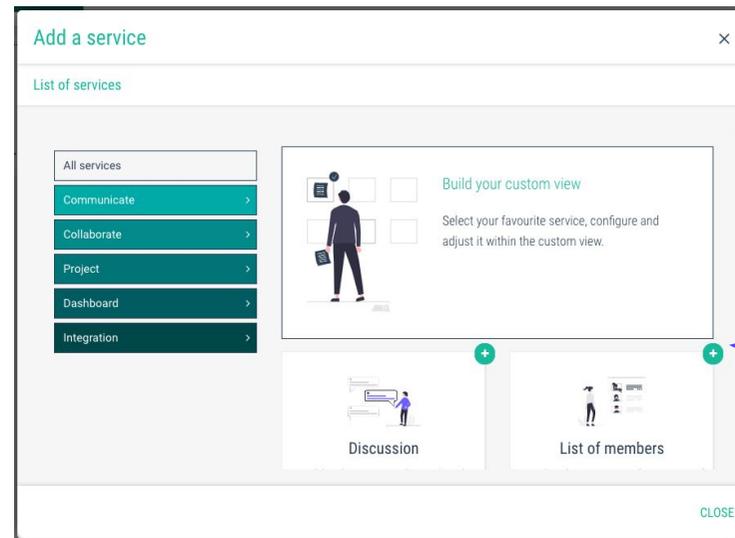
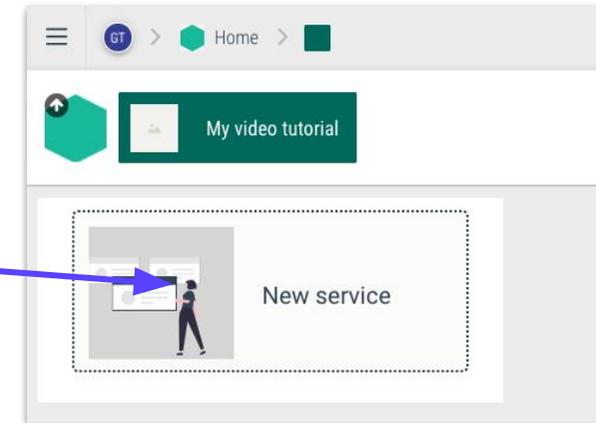
You can sort manually the views with "drag and drop".

To remove a view, you select the view and click on the icon 

How to design the custom view

Go to your custom view on the workspace

1. Click on **New Service** or on the button **+ ADD**
2. Choose between all categories of services then click on 



1

2

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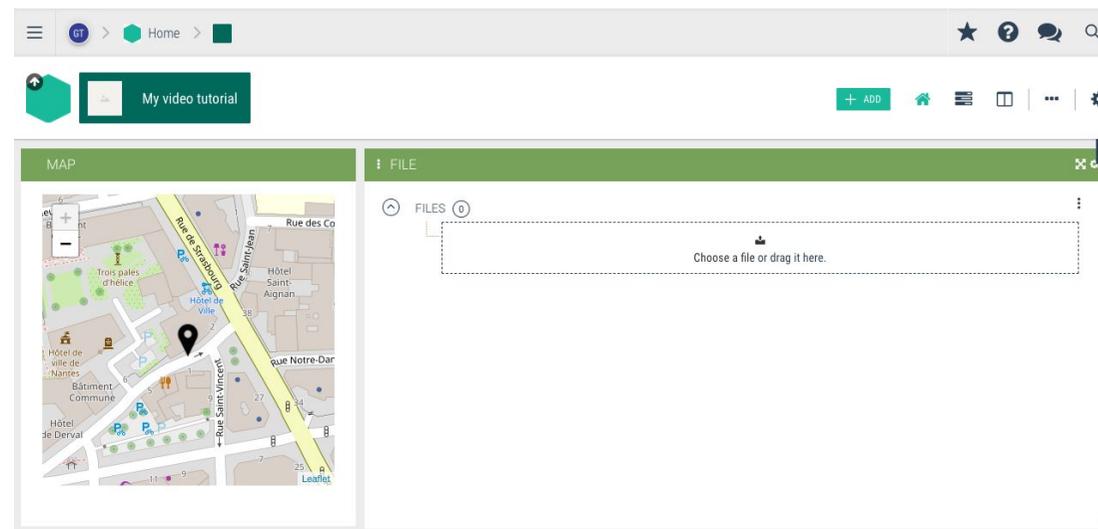
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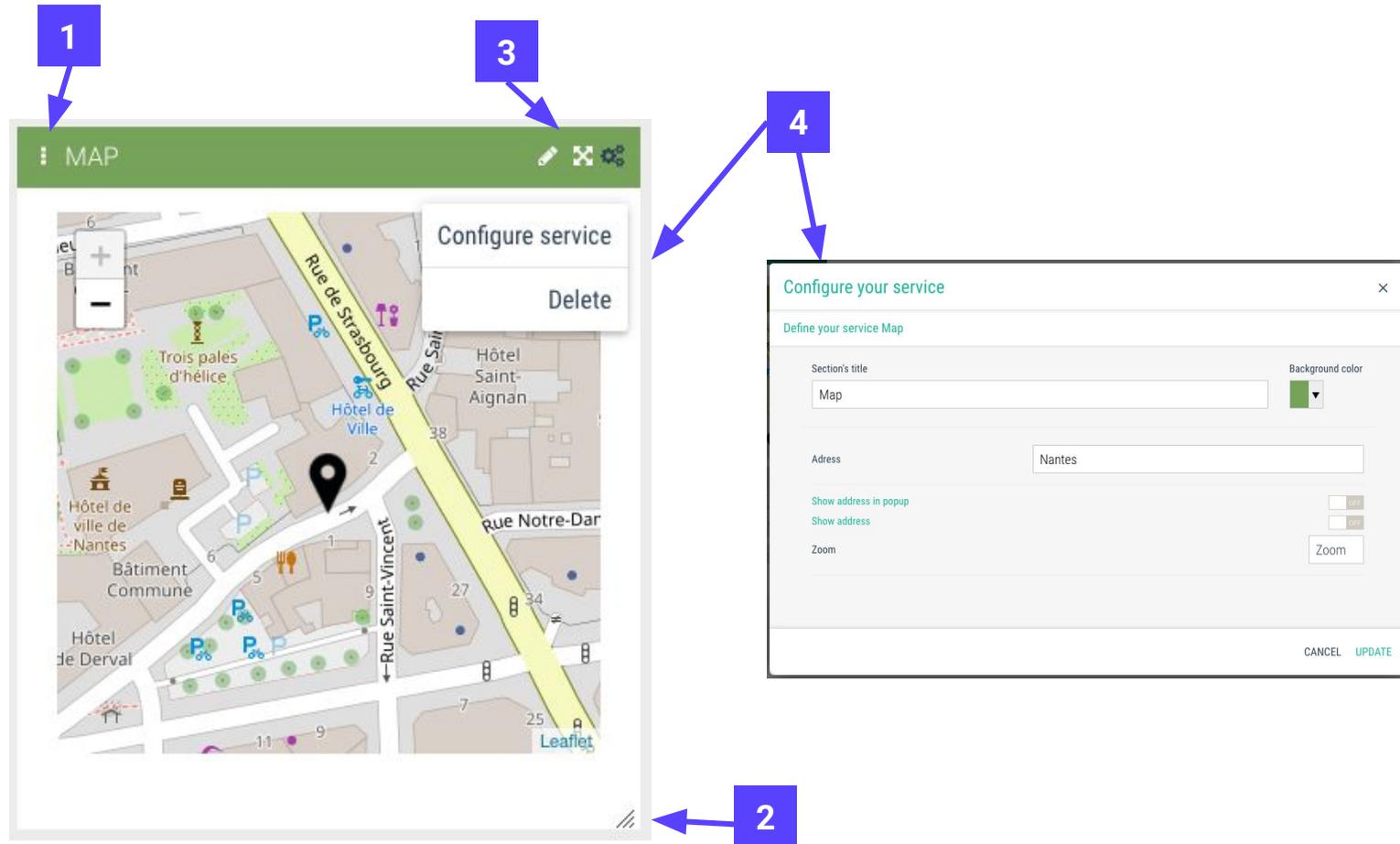
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How to configure a service?

1. Use this icon to position your service in the custom page. 
2. Resize the service window with the bottom right corner icon 
3. Display in full mode your window with the icon 
4. Access to the configuration menu 



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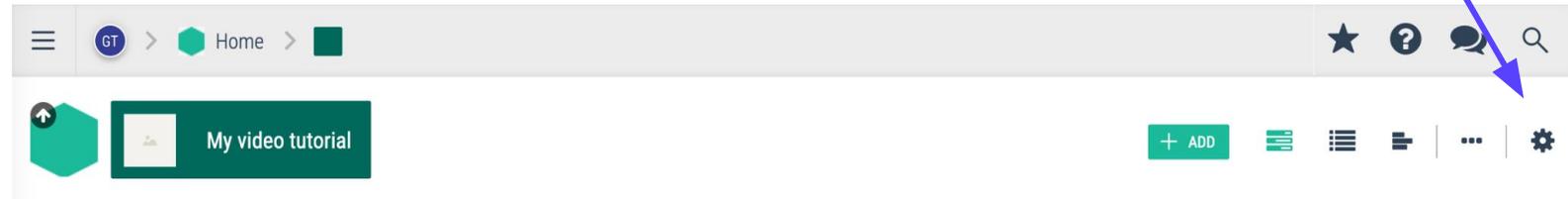
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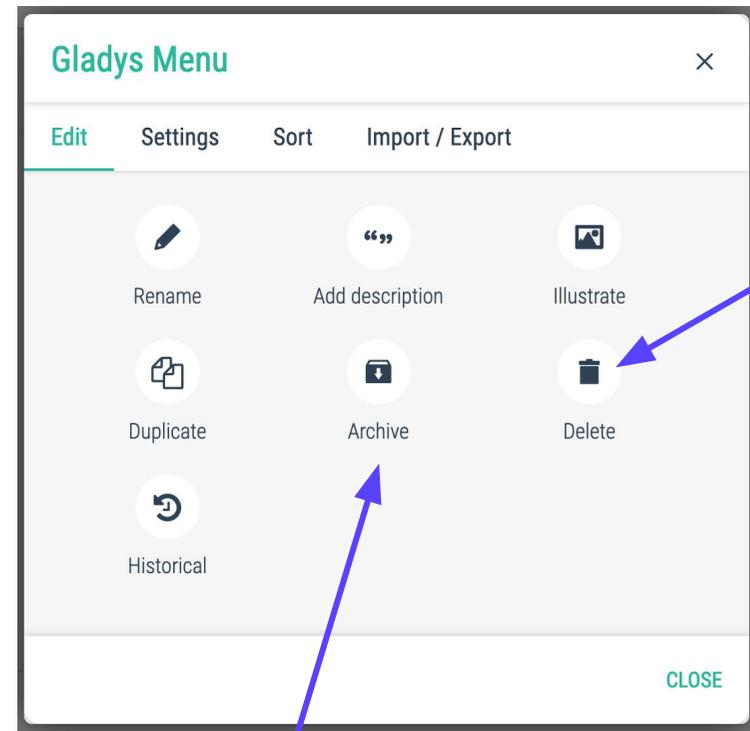
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How to delete my workspace?

1. Go to the top right of the screen and click on the icon 



2. Click on **Delete** and validate your choice



Tip Gladys

If you want to keep your workspace, you can archive it anytime.

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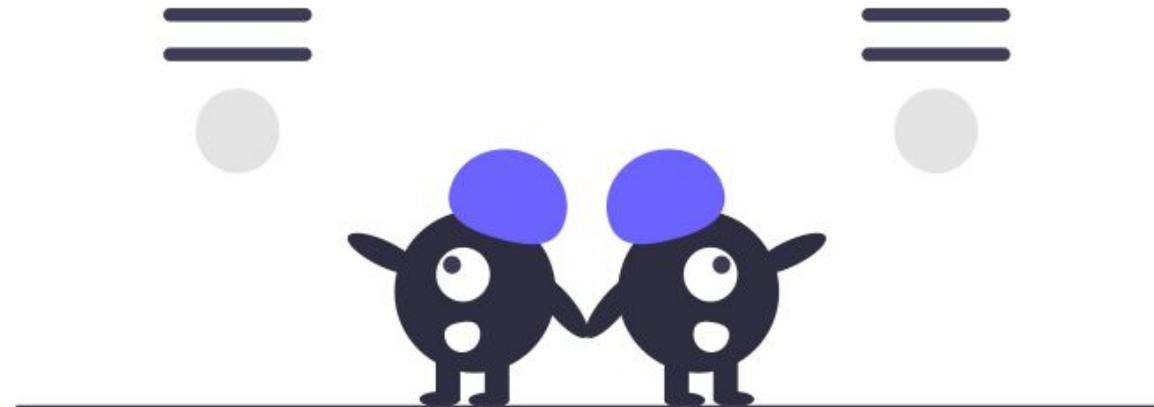
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CONTACTS



Contact overview

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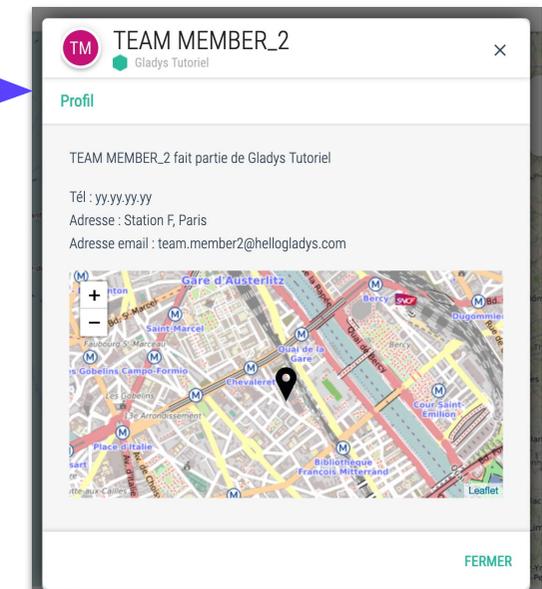
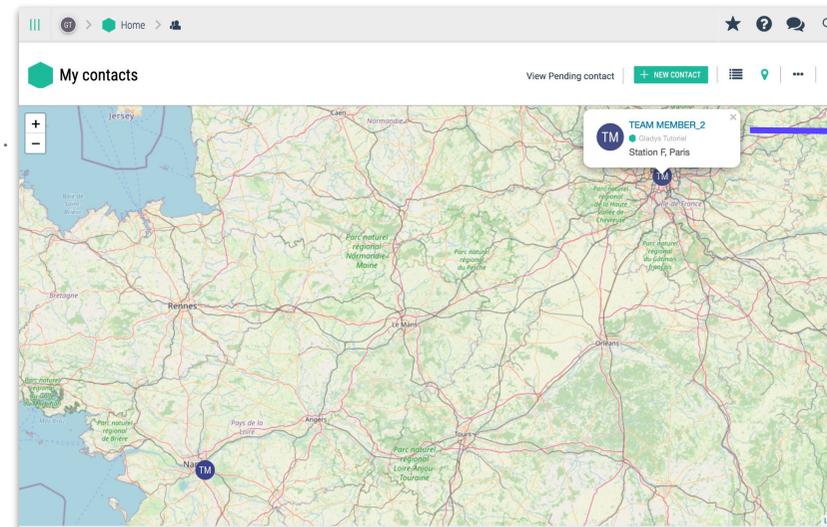
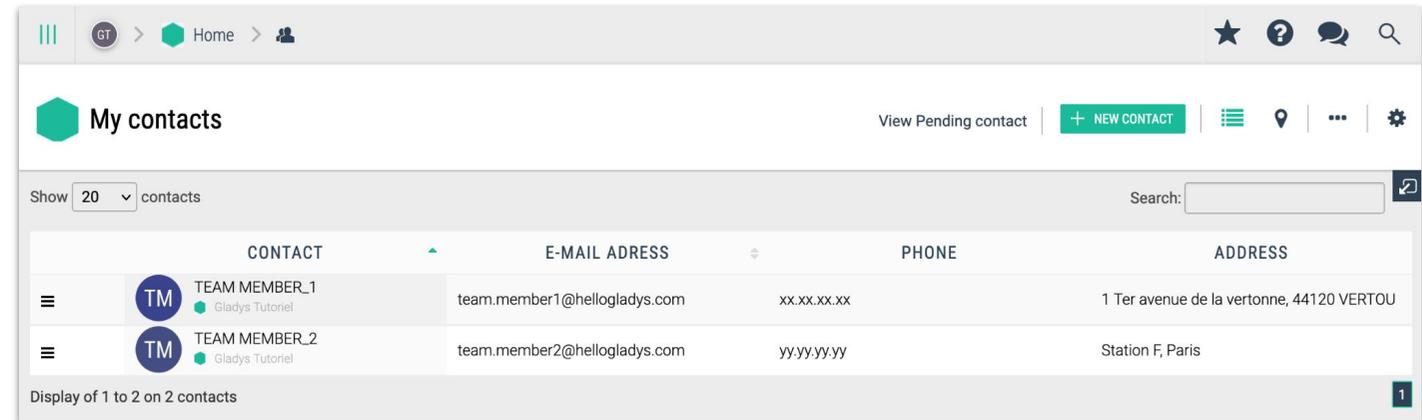
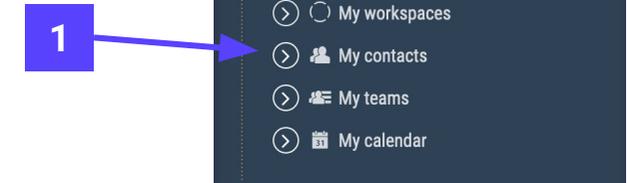
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1. Go to **My contacts** in the main menu to see the list of contacts in your organization as well as the contact information if available.



Tip Gladys

With the premium plan, you can locate your contact on the map view and watch the contact infos.

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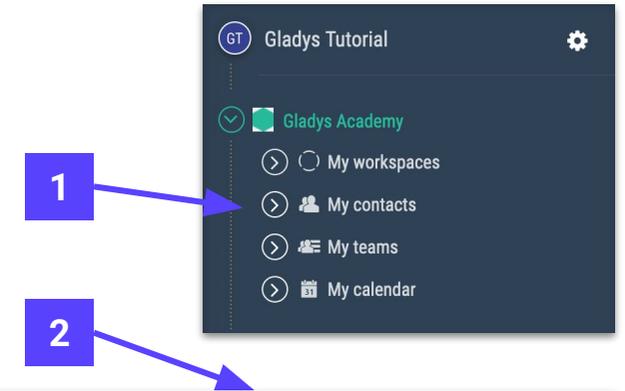
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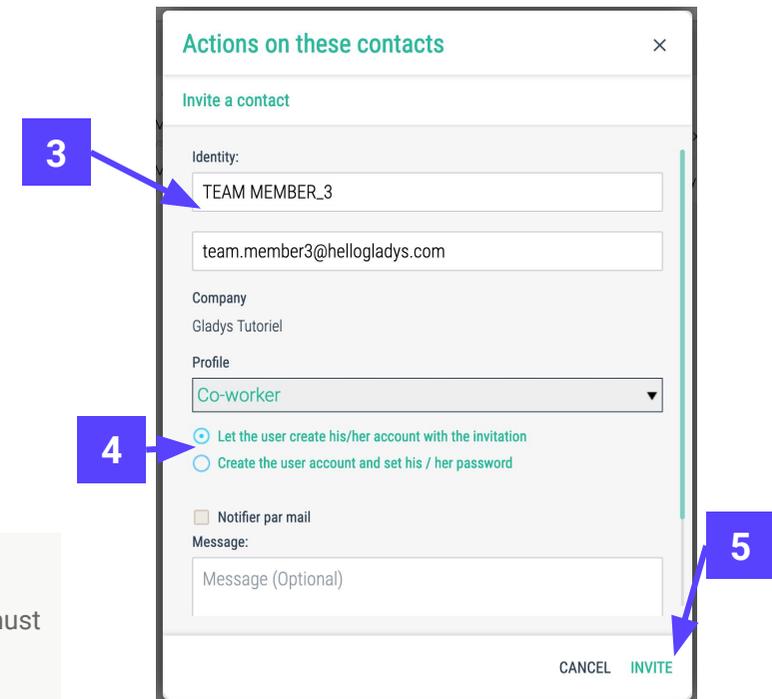
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Invite a contact on my account

1. Go to My contacts



2. Click on **+ NEW CONTACT** to add a new members to your account
3. Enter the contact information
4. Select the option to create the member account
5. Validate your choice



Tip Gladys

If you create manually the password of your contact, you must use 8 characters minimum, 1 upper case letter and 1 number.

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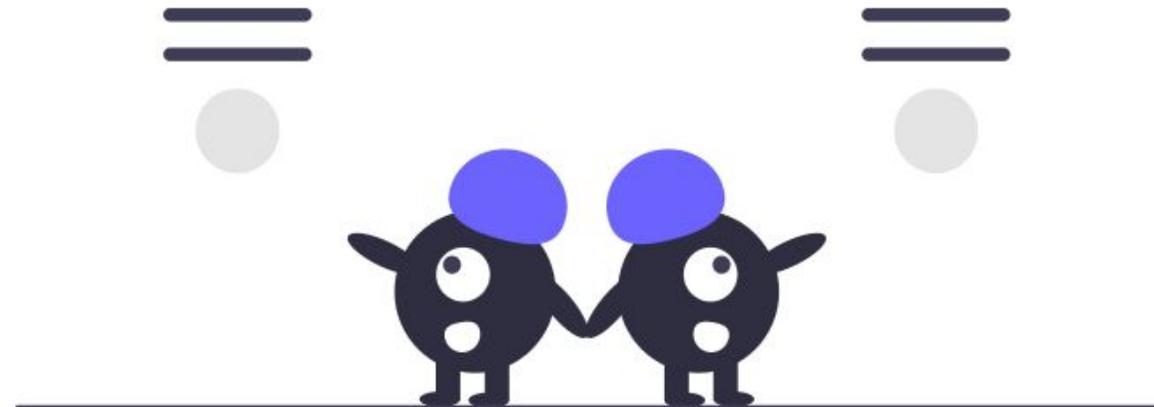
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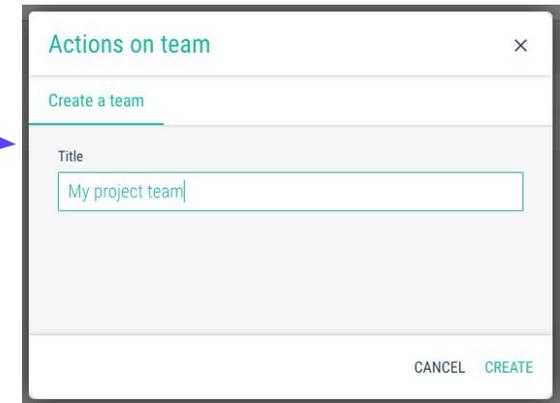
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How to create a team

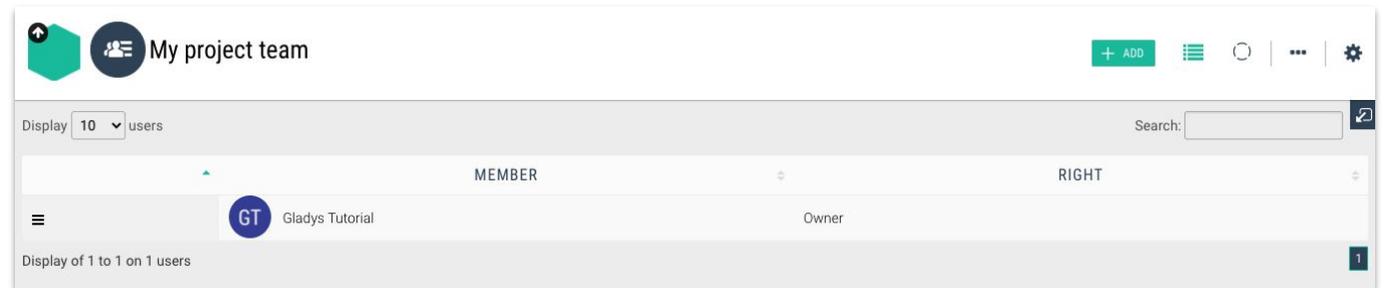
1. Go to **My teams** and click on **+ NEW TEAM**



2. Enter the **name** of your team



3. Click on **CREATE**



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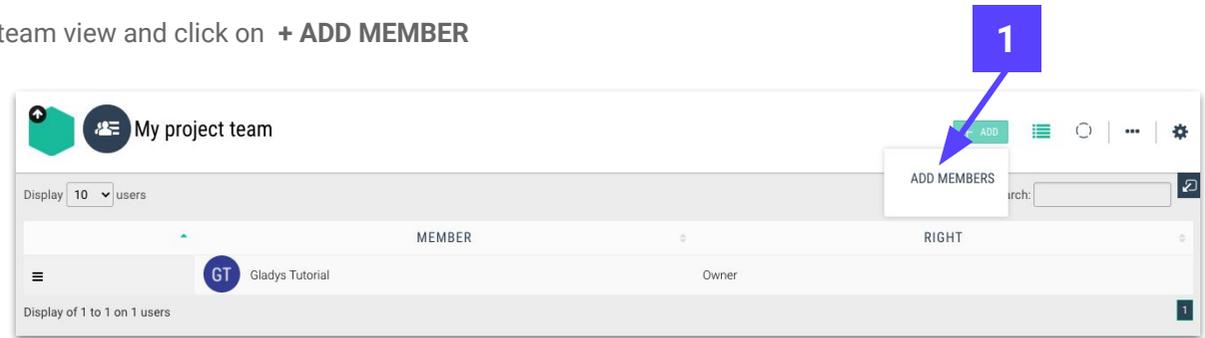
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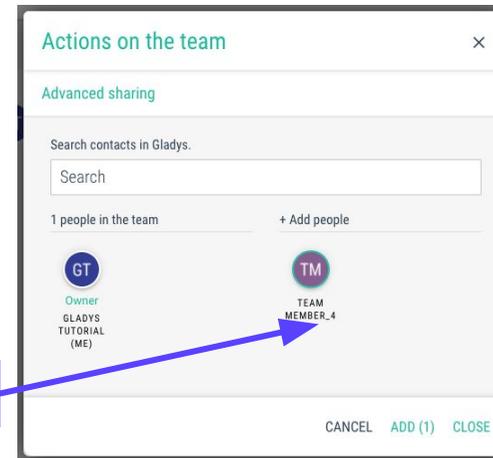
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Add member to a team

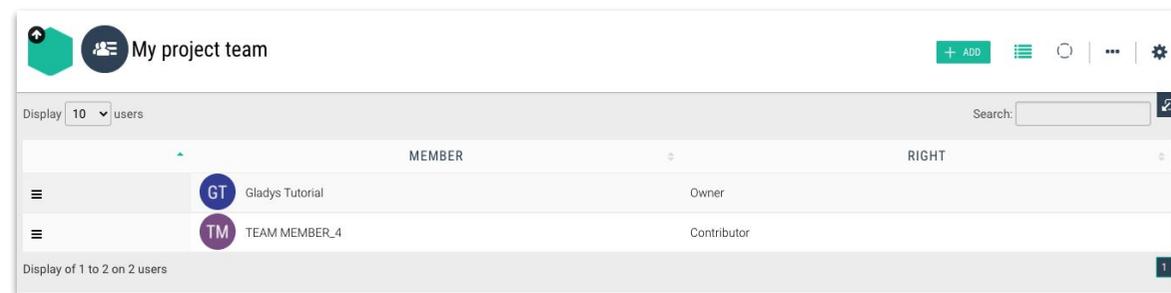
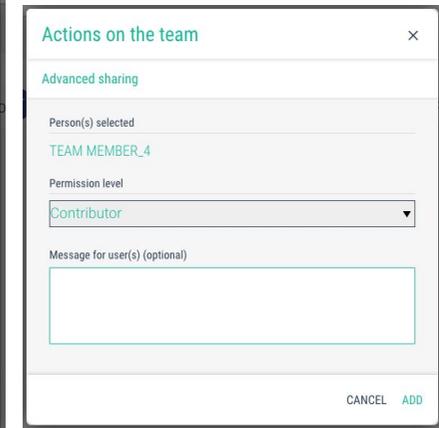
1. Got to the team view and click on **+ ADD MEMBER**



2. Select the team members



3. Choose the right and click on **ADD**



Tip Gladys

Do not hesitate to add further views such as map and resources to get the full experience.

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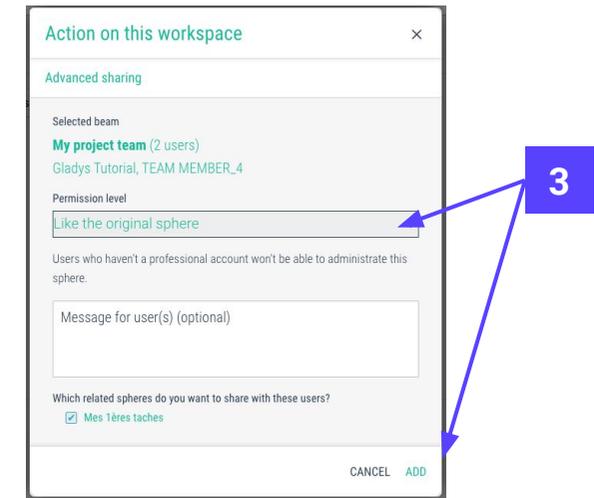
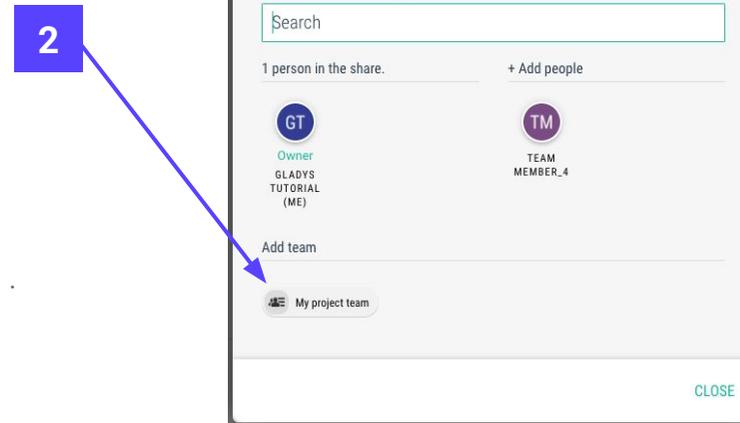
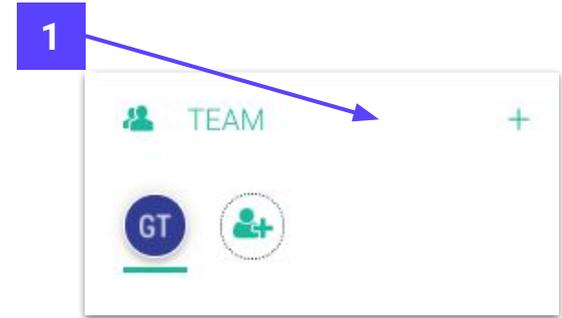
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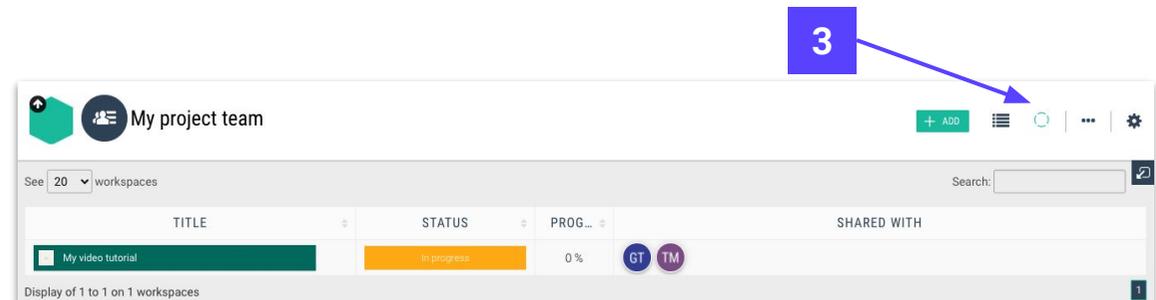
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Share workspace with a team

1. Open the right panel and click on **+** of the **Team** section
2. Select your team
3. Confirm the right of the team members and click on **ADD**



4. On the **Team** page, you can see the workspace in which your team is involved in by selecting the view 



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THANK YOU !

