

USING PROJECTS TO MANAGE WORK & SEND SAMPLES

Welcome to the Using Projects to Manage work and Send Samples Training Plan. We have recommended some training and support content below to help build knowledge in this area of Formpak.

KEY CONTENT

Project Considerations & Set-Up

This PowerPoint presentation provides examples of different project flows and explores the options available when setting up a project.



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PRESENTATION](#)

Projects Guide

This PowerPoint presentation provides an overview of the projects feature in Formpak. It contains a step-by-step video tutorial demonstrating a standard project from start to finish.



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SUPPORTING CONTENT

Introduction Manual - (Pages 12 - 26)

The Formpak Introduction Manual offers an excellent introduction to projects in Formpak, including a summary of how to use projects and tasks and how to search and report projects and tasks.



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THE INTRODUCTION
MANUAL](#)

Projects Overview

This support article provides an overview of the projects feature in Formpak.



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Adding a New Project

This support article provides a step-by-step process for 'Adding a New Project' in Formpak. It also explains some of the options available for the project.



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Task Types

This support article contains a step-by-step guide to 'Adding a New Task Type' in Formpak. It contains explanations of the options available during this process.



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Project Properties

This support article provides a summary of the Project Properties feature in Formpak.



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Search for Projects

This support article explains how to use the 'Search for Projects' tool to find projects that meet a specified criteria.



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Search for Tasks

This support article explains how to use the 'Search for Tasks' tool to find tasks that meet a specified criteria.



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LINKS TO RELATED TRAINING PLANS

Adding & Managing Formulations

This training plan includes formulation development, viewing previous versions of compositions and managing global changes compositions.



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Searching & Finding Products

This training plan includes content on search tools such as 'Find Matching Items' and 'Search for Item'. It also explains other tools such as baskets and cross references.



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Classifying Products & Library Management

This training plan includes content on how to classify items and an overview of item types and item classes. It also explains other tools used to manage product libraries.



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