# HOYLU

# Getting Started
## with Hoylu
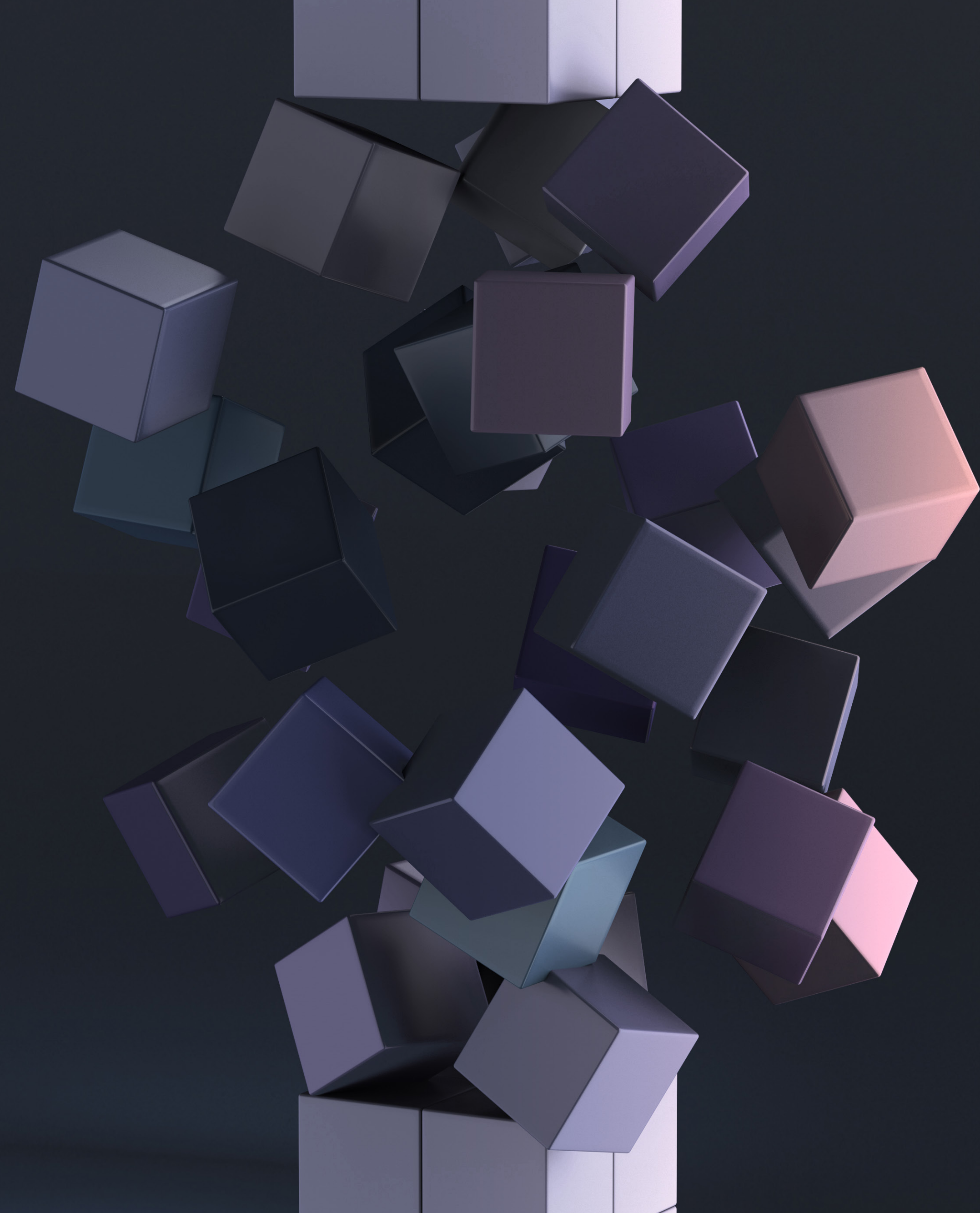
# Discover Hoylu's
# Dynamic Toolbar

Hoylu's dynamic toolbar will transform your team's collaboration. With an intuitive design, you can easily access all your productivity tools.

**1   THE ELEMENT TOOL**

The Selection Tool lets you effortlessly **select, move, and manipulate content** by selecting content rectangularly.

**4   SHAPES**

Easily create d**iagrams, flowcharts, and more** with different shapes, outlines, and fills.

**7   MILESTONES**

These are Sticky Notes that can be used as **progress markers and deadlines.**

**2   THE PEN TOOL**

**Sketch, annotate, and draw freely** with the Pen Tool.

**5   LINE TOOL**

Create perfectly straight lines with **colors, sizes, dash types, and arrow heads** for drawings and diagrams.

**8   TASK INBOX**

Smart Sticky Notes that allow you to **sync tasks with your Hoylu Plan and databases** such as Jira, Agility, or local .CSV files.

**3   STICKY NOTES**

**Jot down ideas, create to-do lists, and collaborate with context,** all within the Sticky Note Tool.

**6   THE TEXT TOOL**

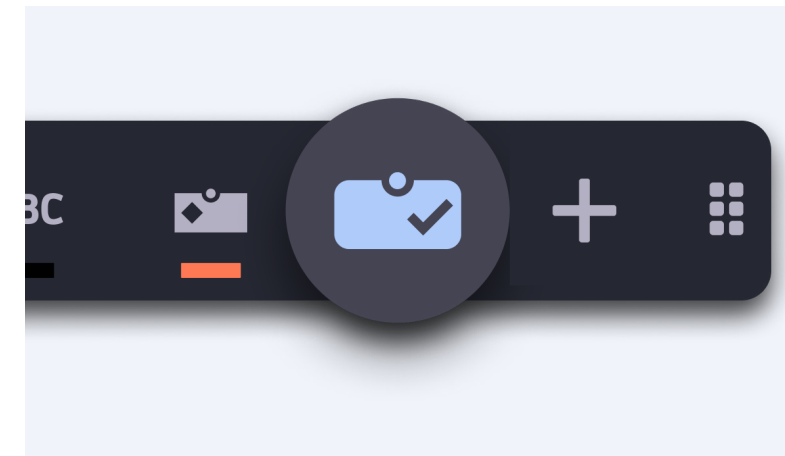Communicate with clarity using the Text Tool. **Add annotations, descriptions, or headings to your content.**

**9   MORE**

**Select the + to access more assests**, such as Tasks, Emojis, Boards, Plans, and Page Backgrounds
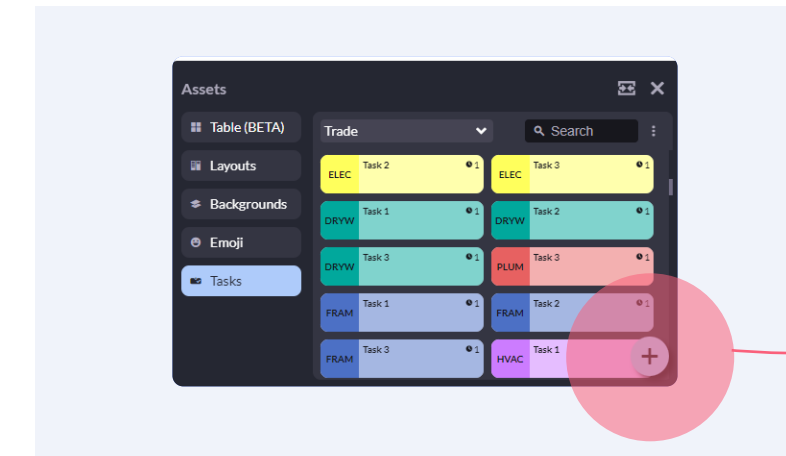
# Create & Use
# Hoylu Tasks

Hoylu Tasks are smart sticky notes that allow you to sync activities between your databases, your CSV files, and your visual Hoylu board.
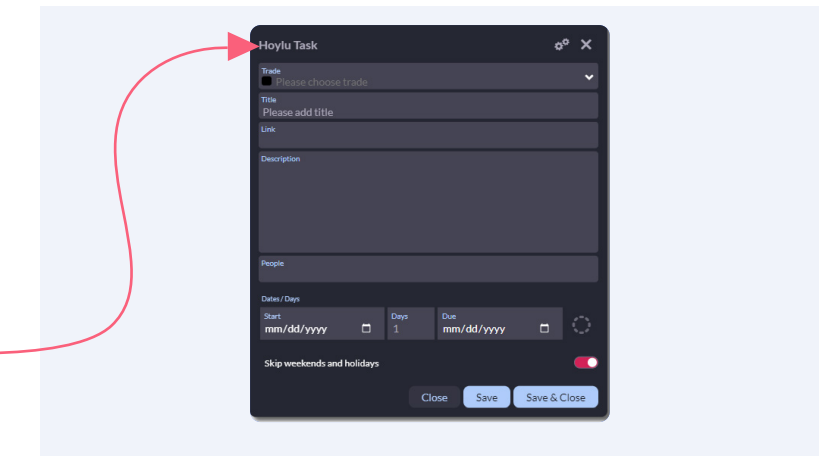


**1** **ADD TASK**

**To Open the Task Inbox, double-click the Task Icon** and double-click where you want the Task Inbox to appear, or simply drag-and-drop a task directly from the Toolbar.
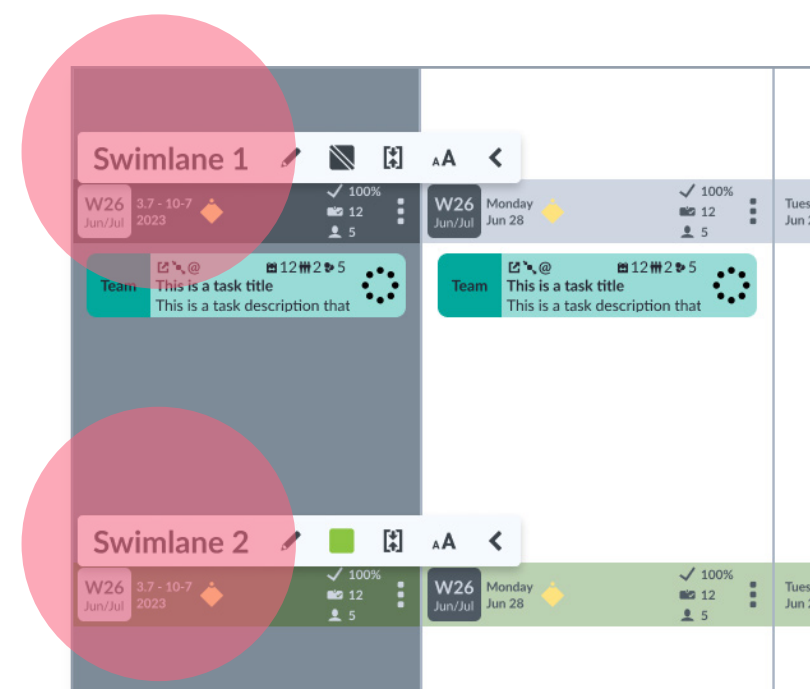


**2** **TASK INBOX (ASSET PANEL)**

New Tasks will appear here. **Drag-and-Drop Tasks to their respective place on the schedule** - a date where work is set to begin.
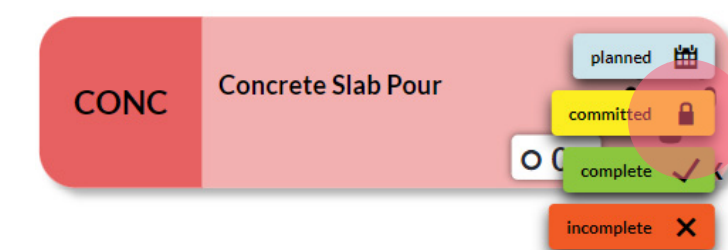


**3** **FILLING OUT TASKS**

**Enter information in Task fields**, such as number of days and people needed, and **be as specific as possible. Save, and close.**



**4** **SWIM LANES**

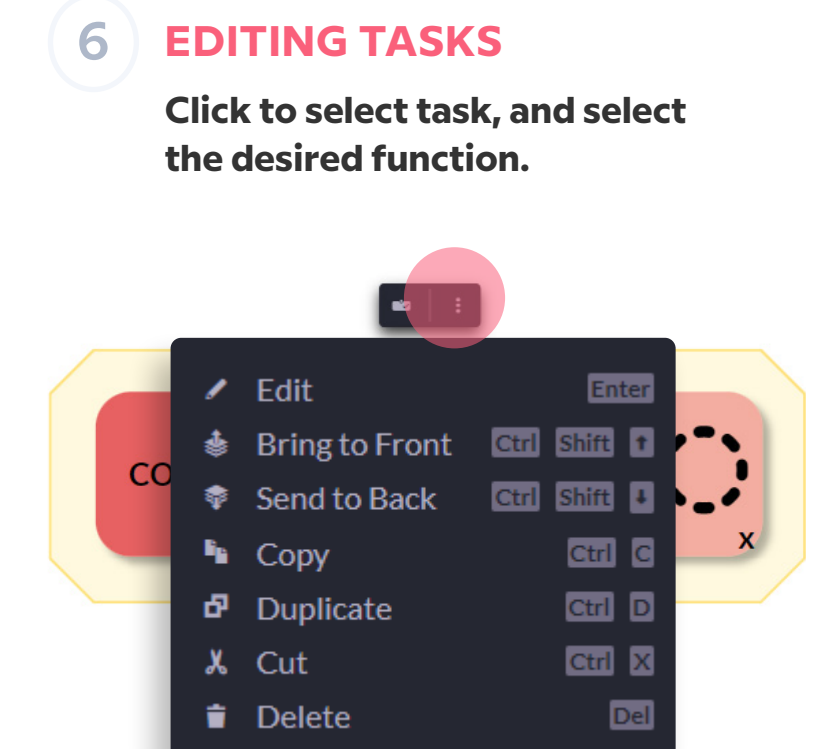**Place tasks within desired swim lane.**



**5** **COMMITTING TASKS**

**Once task duration is verified by the subcontractor & team, click on the circle icon and then click "committed".** Once a task is committed, the task cannot be moved/edited by the subcontractor. It must be either marked as "complete" or "incomplete".



**6** **EDITING TASKS**

**Click to select task, and select the desired function.**

# Exploring the Elements of a **Hoylu Task**

With a single click, seamlessly access and edit Task Properties. These dynamic attributes empower your reporting capabilities, offering a comprehensive understanding of your project's progress.

**1  TEAM/TRADE**

**Assign Users and Tasks to Teams/ Trades.** Defining Trade Resources with Crew Sizes and utilizing the Resources fields will help you determine Capacity limits.

**2  PROGRESS**

When "Planned" doesn't say enough, mark the level of progress. NOTE: Confirmed or Committed tasks **automatically reach 100% upon completion**

**3  VARIANCE REASONS**

Construction site rained out? Make sure to set a Variance Reason if the task is not completed on time so it is **reflected in reports**.

**4  SMART SYNC**

Hoylu imports and exports from .CSV files as well as integrates with software such as **Jira** and **Digital. ai's Agility**.

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**Hoylu Task**

**Team**
🟪 Team Pink

**Title**
Task Title

**Link**
www.link.com

**Description**
Materials needed:
Details:

**People**
2

**Progress**
50% | 10 20 30 40 50 60 70 80 90 100

**Dates / Duration**
Start
2022-6-29
Duration
2
Due
2022-6-30

Planned Start
2022-6-29
Duration
2
Planned Due
2022-6-30

Skip weekends and holidays

**Labels**
Variance Reason | Weather

Close | Save | Save & Close

# The Easiest Way to Digitize Construction Planning

With Hoylu, your team will streamline project planning, enhance collaboration, and improve overall project management. Here's how to set up a Pull Plan.

**GO MORE IN DEPTH IN OUR KNOWLEDGE BASE** ▶

**1** **TITLES**

Naming your Plan is important — especially if you have **multiple Plans or Boards** in the same Workspace.

**2** **INSIGHTS**

Via the Insights Panel, **generate reports** as charts or as Weekly Work Plans and filter by Trades, Swimlanes, Status, and Labels.

**3** **SETTINGS**

A Plan's settings will allow you to set Plan **editing permissions, Anchor dates, default work days, Swimlanes, and Label visibility.**
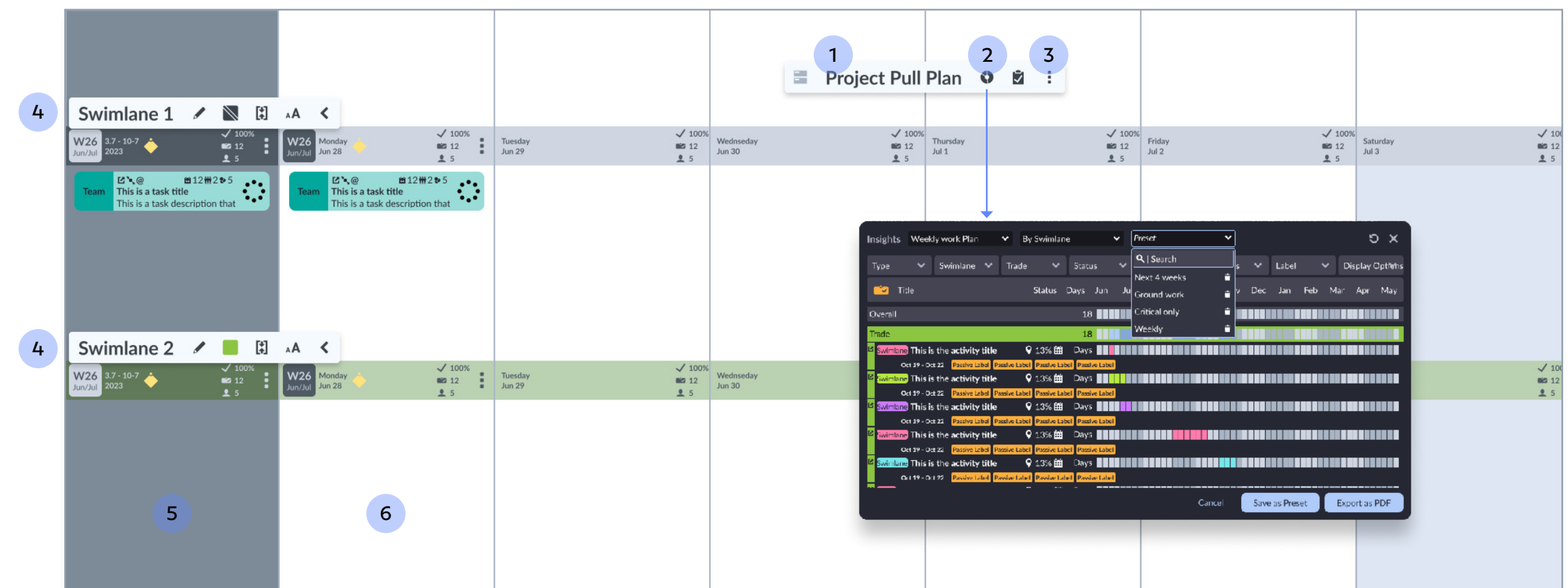


**4** **SWIMLANES**

**Divide Plans into Swimlanes to organize tasks** by shifts, sites, or any other differentiators unique to your workflow.

**5** **WEEKS**

**Weeks can be expanded or collapsed.** Add an anchor date in the Timeline Settings in order to enable dates rather than just Project Increments.

**6** **DAYS**

Expand a week to plan on a day-to-day basis. This view can be **more accurately visualize task lengths.**

## Agile Excellence with Hoylu's Dynamic Boards

Great for planning work in either blocks of time or tracking by status, Hoylu's Agile Boards provide an intuitive column-by-column structure to organize lists of tasks or sticky notes.

**GO MORE IN DEPTH IN OUR KNOWLEDGE BASE** ▶

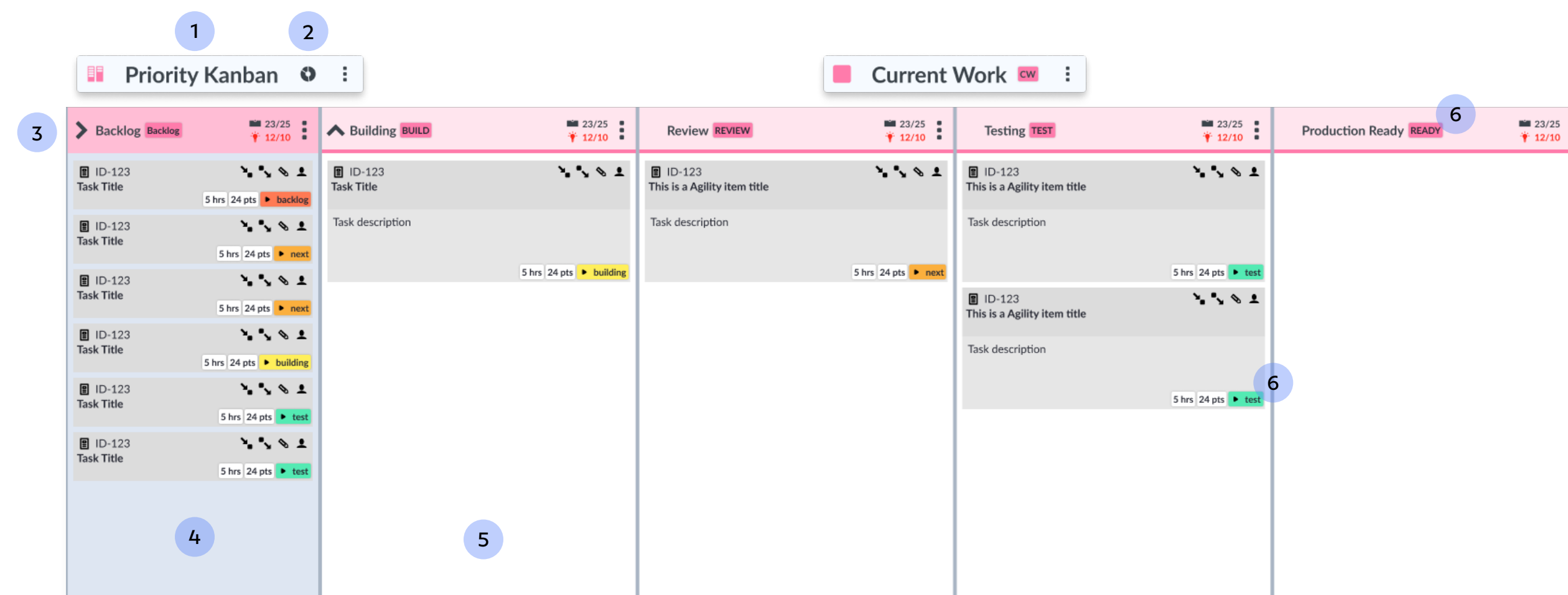**1** **TITLES**

Naming your Board is important — especially if you have **multiple Plans or Boards in the same Workspace.**

**2** **INSIGHTS**

**Generate Reports** on your Board and filter by Status, Priority, Type, and Label.

**3** **COLLAPSED VIEW**

Click on a Column to Collapse or Expand it. **Each Column can be organized into Sections** such as priority or status.



**4** **COLUMNS**

Manage Columns and their Sections with **color-coding, labels, and element placement options.**
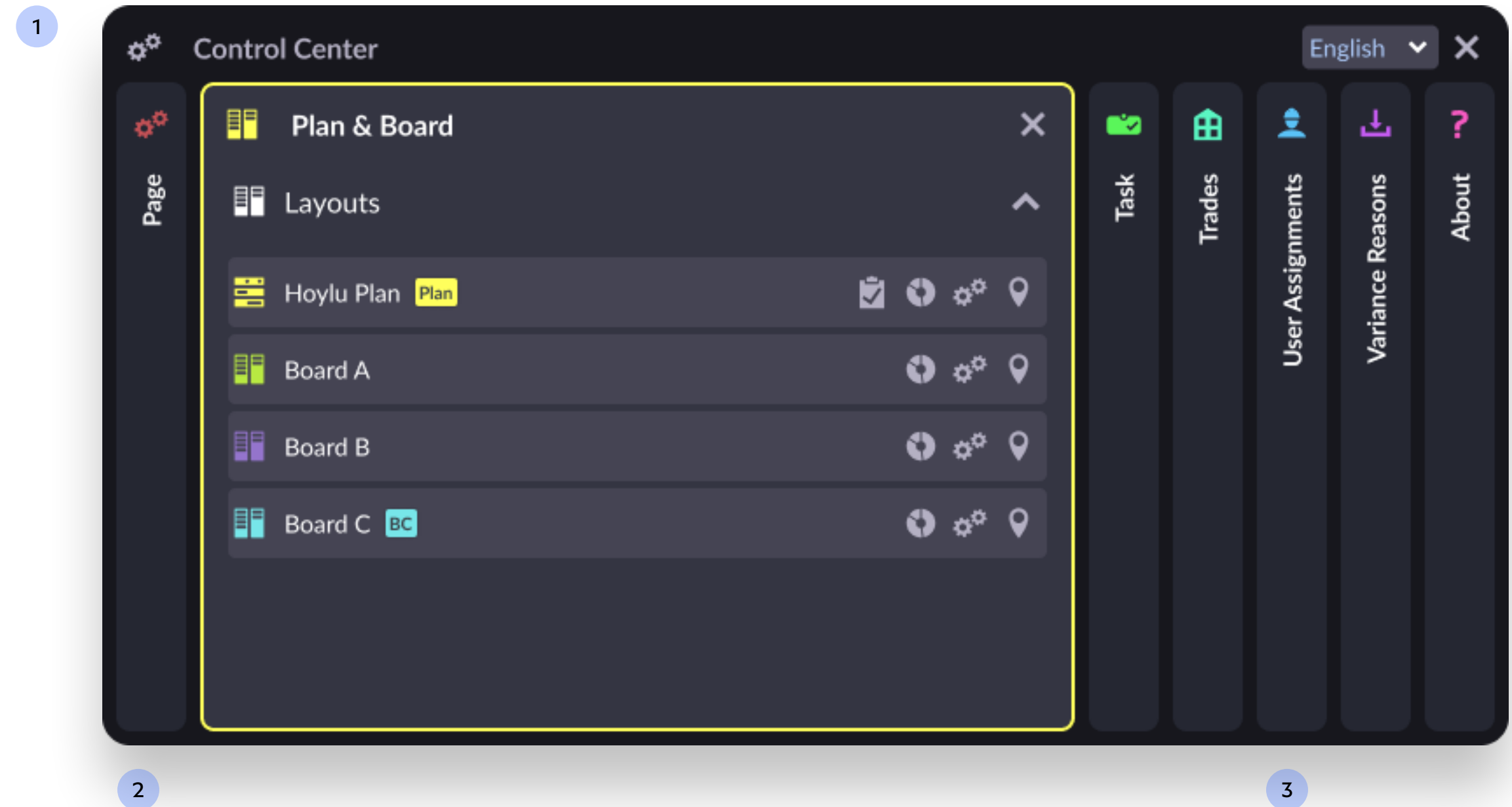
**5** **SECTIONS**

Manage Sections with **color-coding, labels, and task limits.**

**6** **INTERACTIVE LABELS**

Easily **sort your imported tasks into sections & columns** or otherwise add properties to your Notes and Tasks.

# Diving into the
# **Control Center**

For admins, assigning trades to users and customizing tasks has never been more convenient. Styling changes for pages, connection options, layouts, task settings, trade customization, user assignments, and more are now accessible from one central hub.

**1** **ALL-IN-ONE VIEW**

Multiple settings can be manipulated side-by-side by **"CTRL+click"**-ing a second section to open - enabling you to make changes with more context.

**2** **WORKSPACE SETTINGS**

**Set defaults for your workspace** such as toggling page numbers & grid lines, to setting up Trades and Variance reasons for Pull Plans.

**3** **USER PERMISSIONS**

In addition to the separate Workspace Info settings, User Assignments can be found in the Control Center to **manage permissions and teams/trades.**

**Schedule a Training** with our
Customer Success Representatives at
hoylu.com/meet

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