



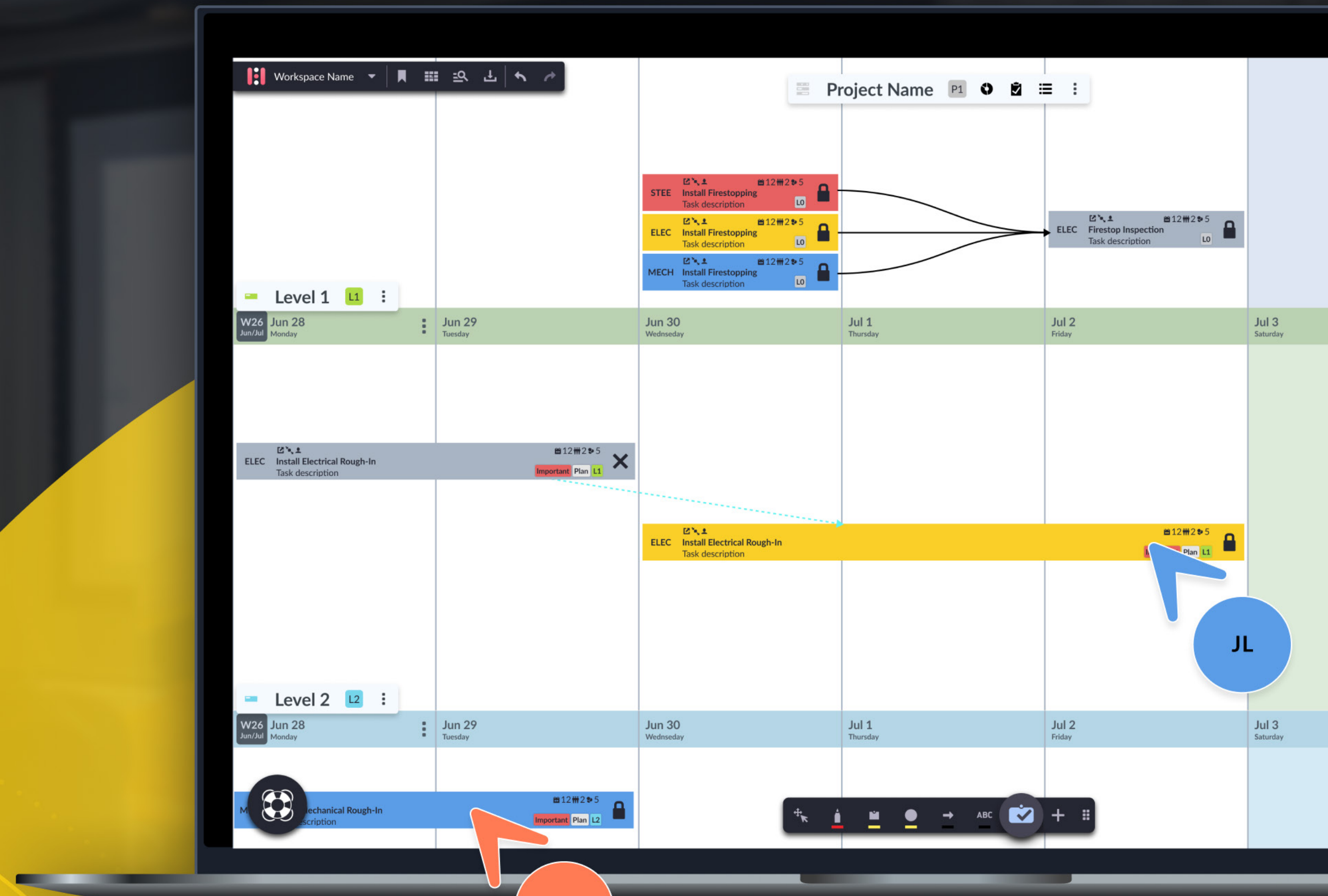


Getting started with Hoylu

 **WEBSITE:** www.hoylu.com

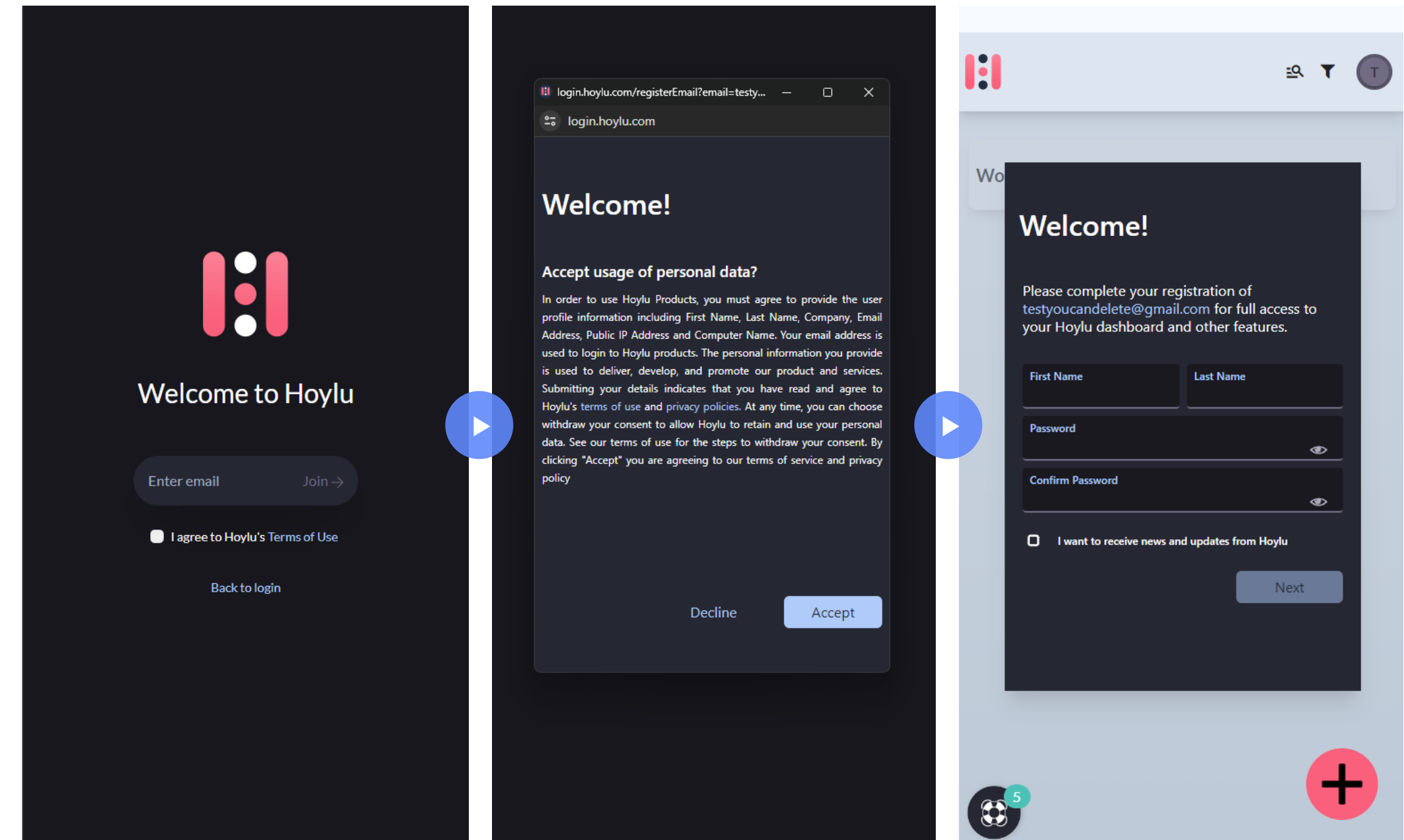
 **KNOWLEDGE BASE:** www.support.hoylu.com

 **CONTACT US:** support@hoylu.com



Account setup & login

To sign up for Hoylu, begin by entering your user information and setting up a password. You also have the option to agree to receive updates and communications from Hoylu about new product features.



1 SIGN UP

Sign up or log in via:
<https://login.hoylu.com/>

2 ACCEPT TERMS

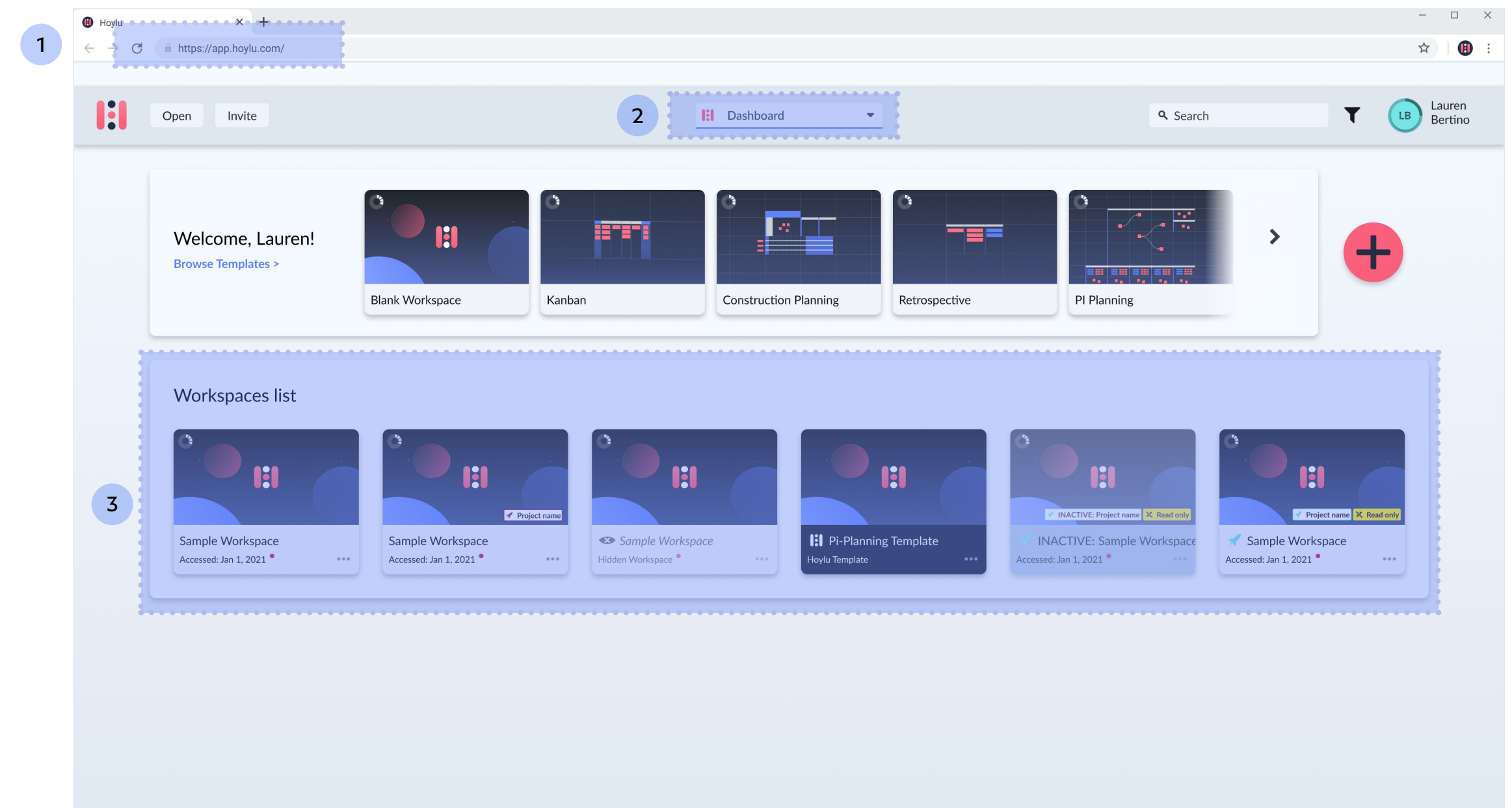
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> [Privacy Policy](#)

3 ADD USER INFO

Add your user details and create your password. Optionally, you can consent to communications from Hoylu regarding product updates.

Navigating the Dashboard

The Hoylu Dashboard is a centralized platform that offers users a comprehensive view of users' Workspaces and Projects.



1

YOUR DASHBOARD

Access your Hoylu dashboard via <https://app.hoylu.com/>

2

YOUR PROJECTS

Use the drop-down to select which project you would like to view. If you have not been invited to any projects, the default folder holds all of your Workspaces.

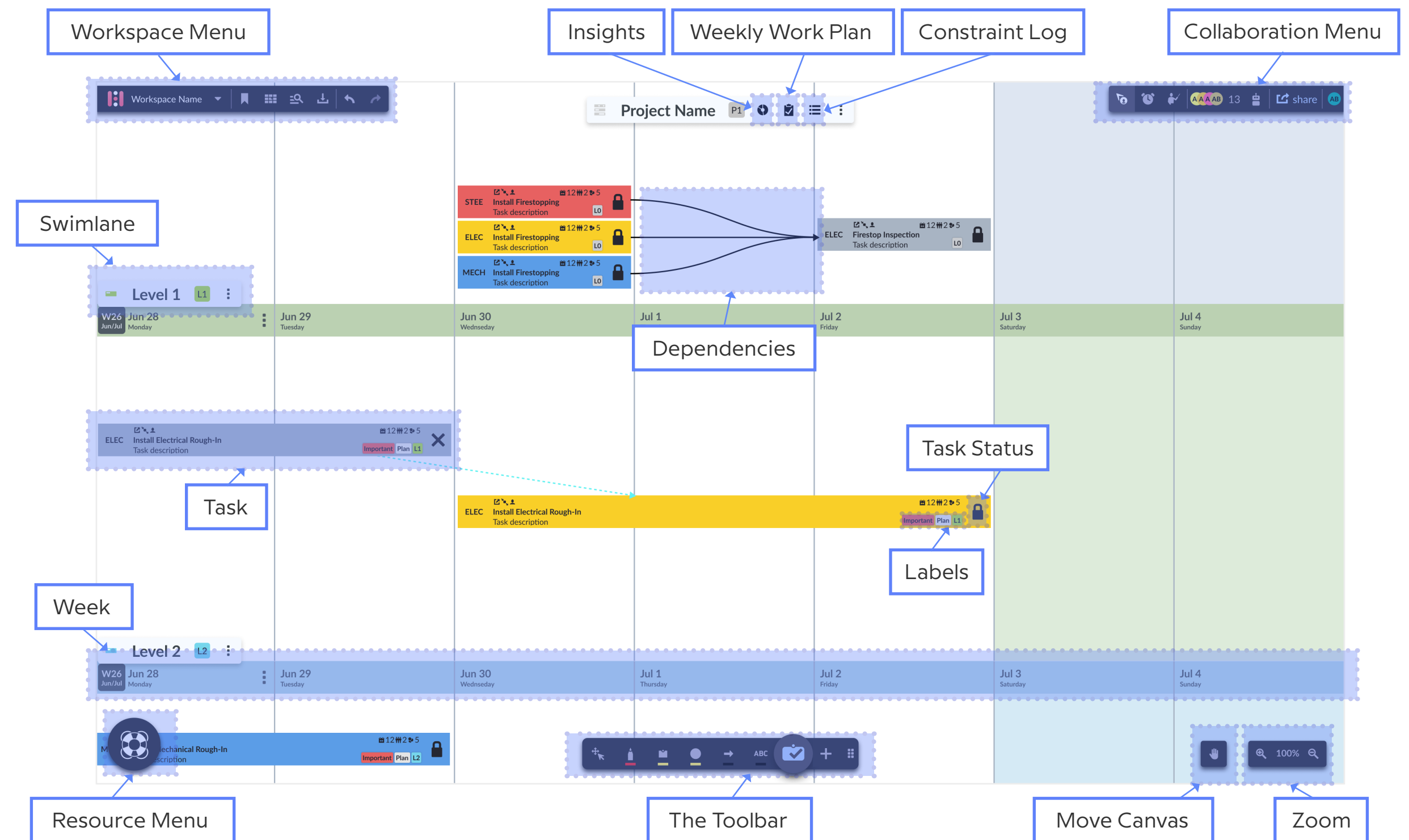
3

YOUR WORKSPACES

Your Workspaces will be listed on your dashboard for quick access. Custom thumbnails and Labels can be added to Workspaces for additional filtering.

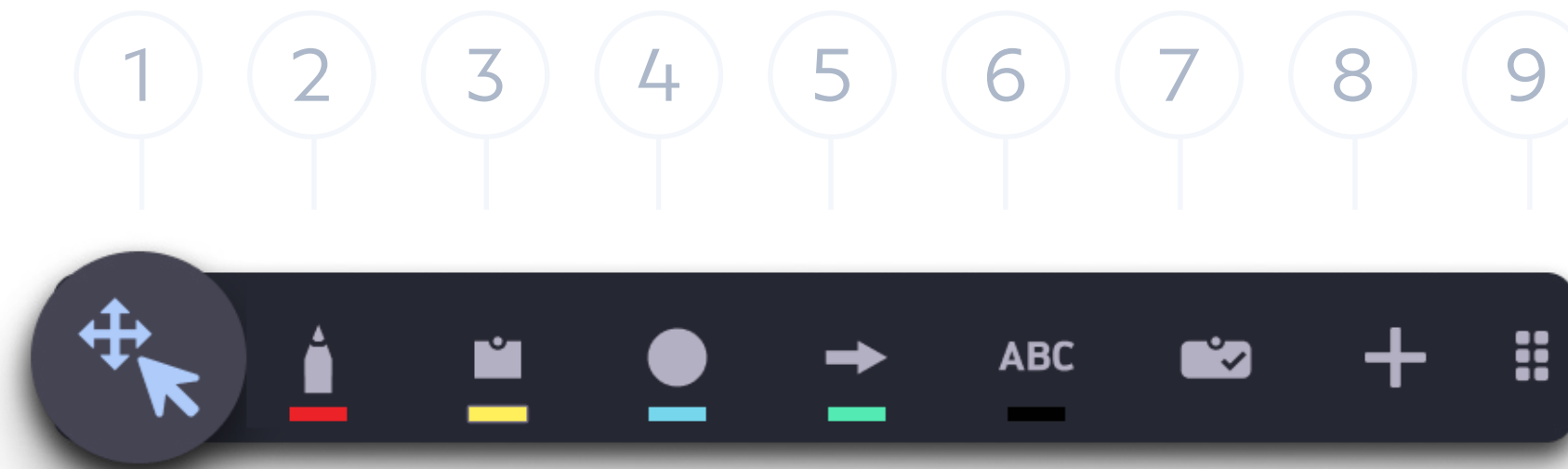
Navigating your Workspace

The Hoylu Workspace is a dynamic, collaborative environment designed to boost productivity and enhance teamwork. This interactive space allows users to freely create, manage, and share content in real-time, fostering an atmosphere of innovation and efficient communication.



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.

2

THE PEN TOOL

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

3

STICKY NOTES

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

4

SHAPES

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

5

LINE TOOL

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

6

THE TEXT TOOL

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

7

TASK TOOLS

Task, Milestone, and Constraint notes that allow you to **sync items with your Hoylu Plan and databases** such as Jira, Agility, or local .CSV files.

8

MORE

Select the + to access more assets, such as Tasks, Emojis, Boards, Plans, and Page Backgrounds

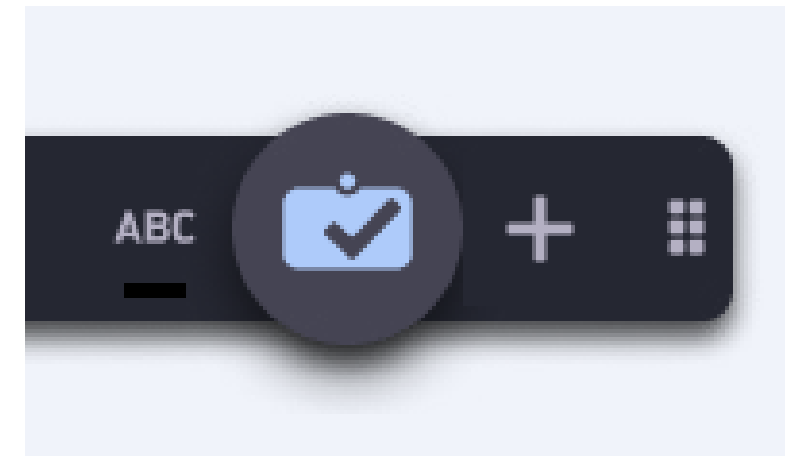
9

DRAW HANDLE

Drag the Toolbar wherever you need it on the canvas.

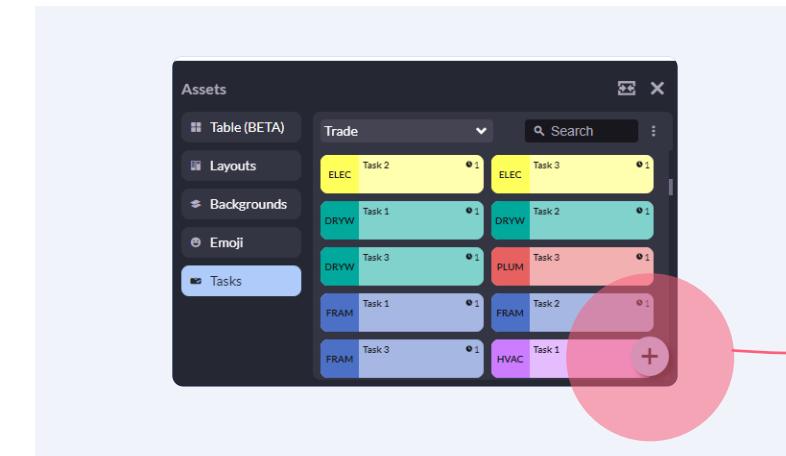
Create & Use Hoylu Tasks

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



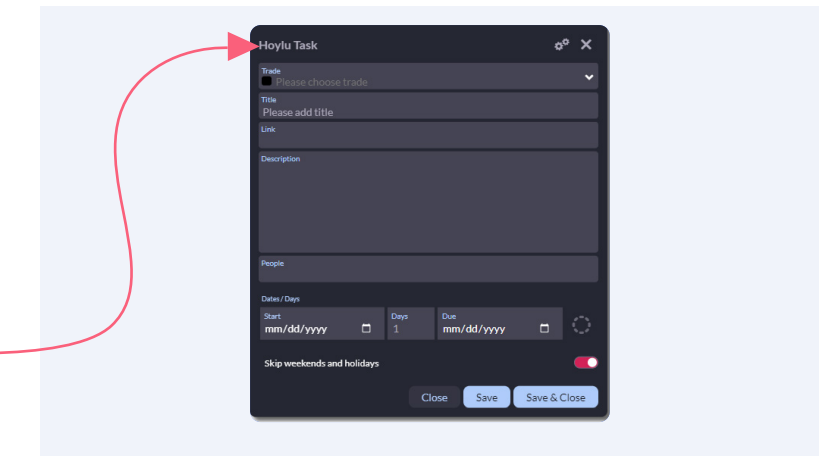
1 ADD TASK

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.



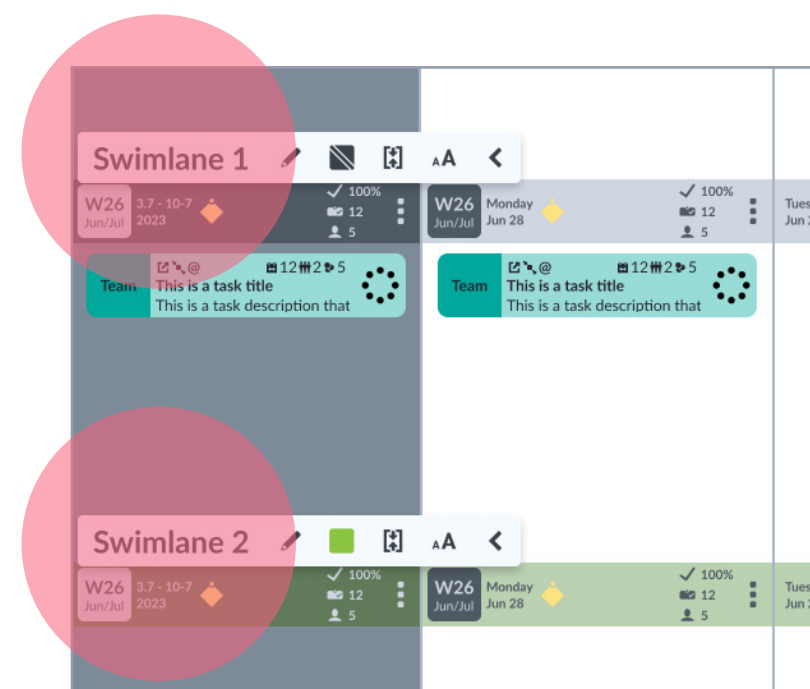
2 TASK INBOX (ASSET PANEL)

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



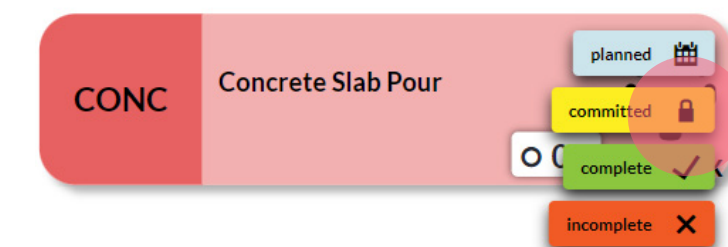
3 FILLING OUT TASKS

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



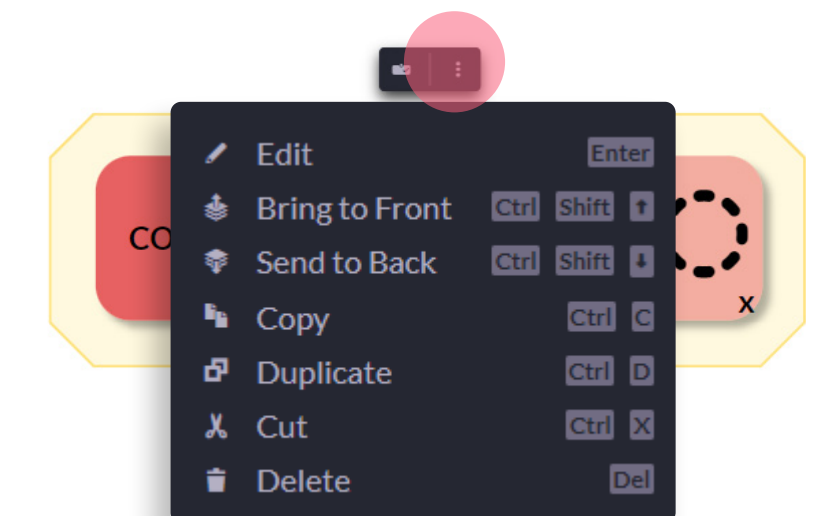
4 SWIM LANES

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**.

Hoylu Task

Team

Team Pink

×

▼

Assignee

jakob.leitner@gmail....

×

▼

Title

Task Title

Description

Content

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

▼

Outcome Notes

....

Close

Save

Save & Close

4

Pull Planning Boards in Hoylu

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

1 INSIGHTS

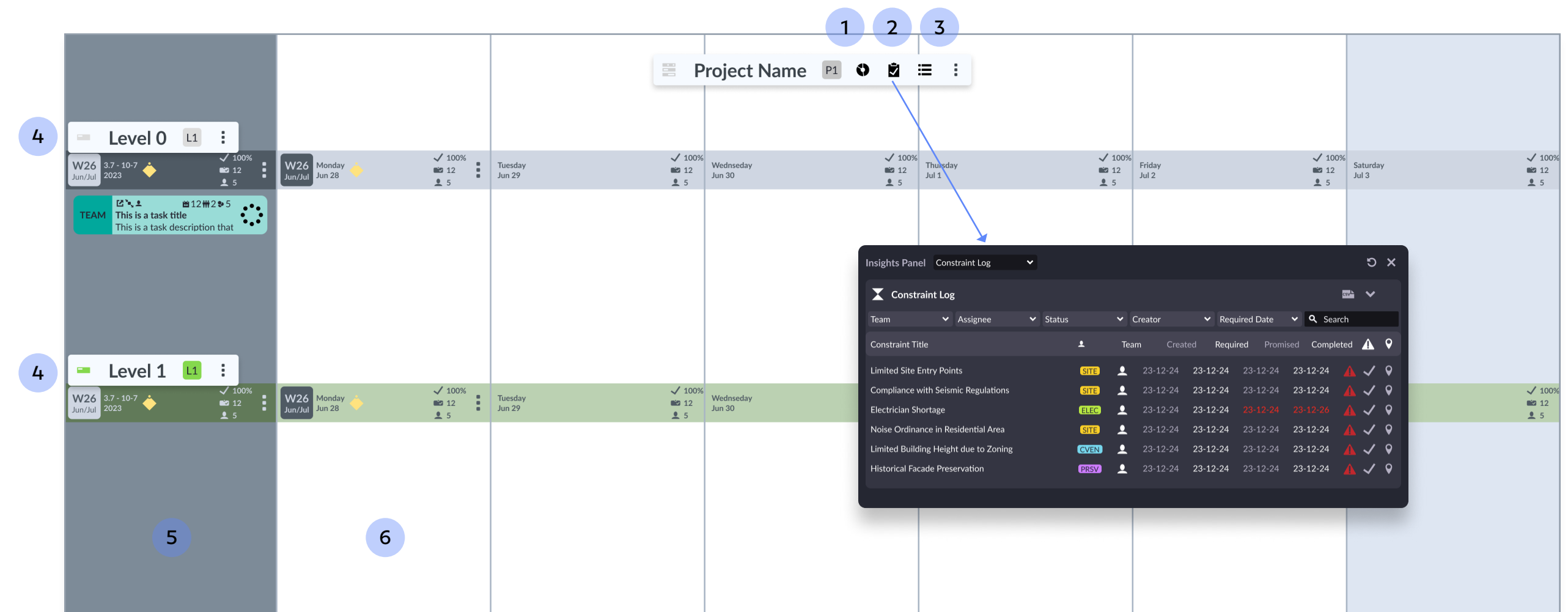
Via the Insights Panel, **generate reports as visual pie, line, and bar charts**. Filter by Trades, Swimlanes, Status, and Labels.

2 WEEKLY WORK PLAN

Visualize your plan with weekly lookaheads. Weekly Work Plans (WWPs) can also be filtered by type (Tasks, Milestones, Constraints) and customized by weeks.

3 CONSTRAINT LOG

View, filter, and manage all constraints in the Workspace in one screen.



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 **more accurately visualize task lengths**.

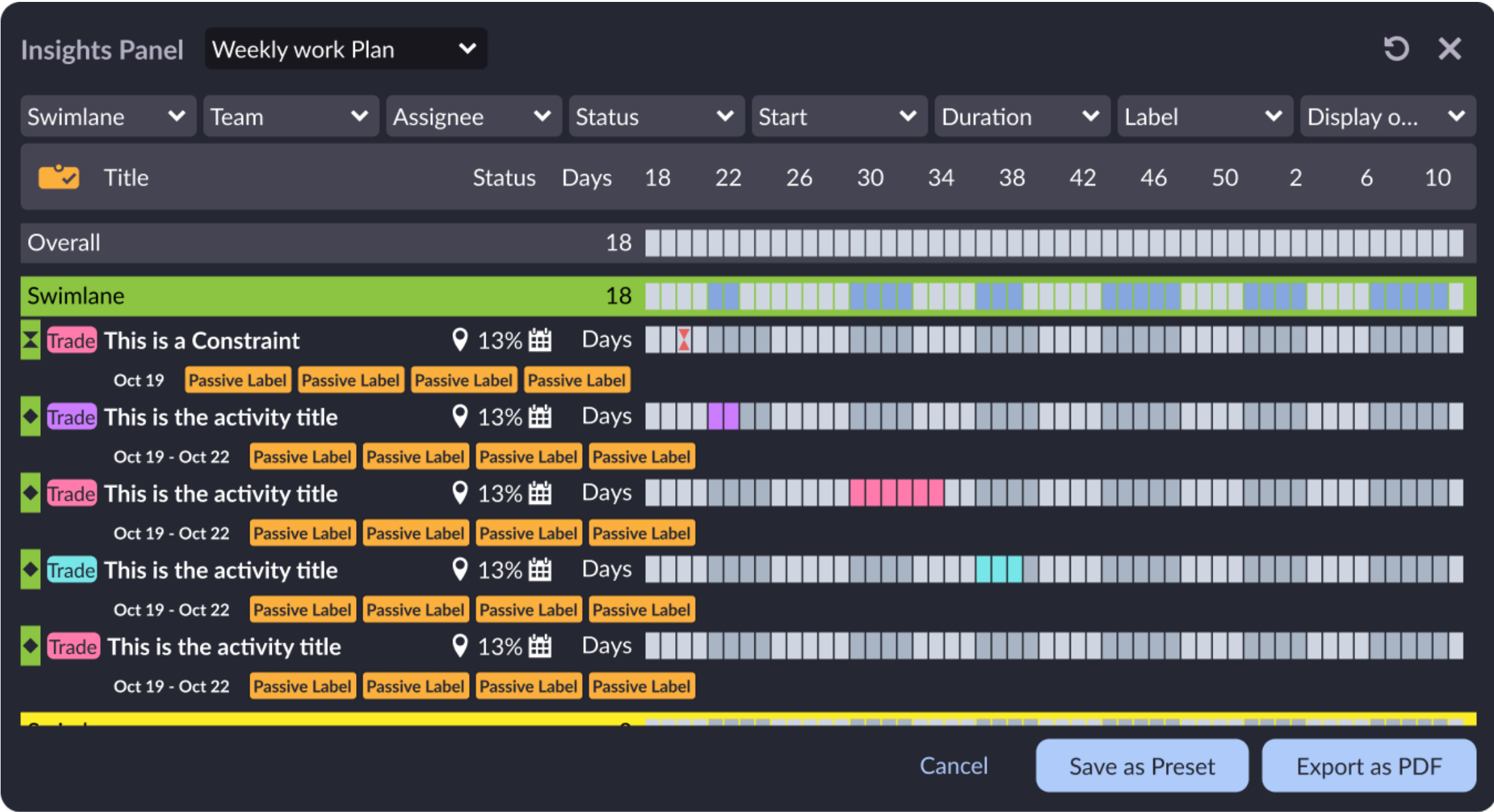
Utilizing the Insights Panel - Charts

Via the Insights Panel, generate reports as visual pie, line, and bar charts. Filter by Trades, Swimlanes, Status, and Labels.



Utilizing the Weekly Work Plan (WWP)

Visualize your plan with weekly lookaheads. Weekly Work Plans (WWPs) can also be filtered by type (Tasks, Milestones, Constraints) and customized by weeks.



Utilizing the Constraints Log

View, filter, and manage all constraints in the Workspace in one screen. This centralized log helps teams identify and address potential bottlenecks efficiently, ensuring smoother workflow and project progression.

Insights Panel

Constraint Log

Constraint Log

CSV

Team

Assignee

Status

Creator

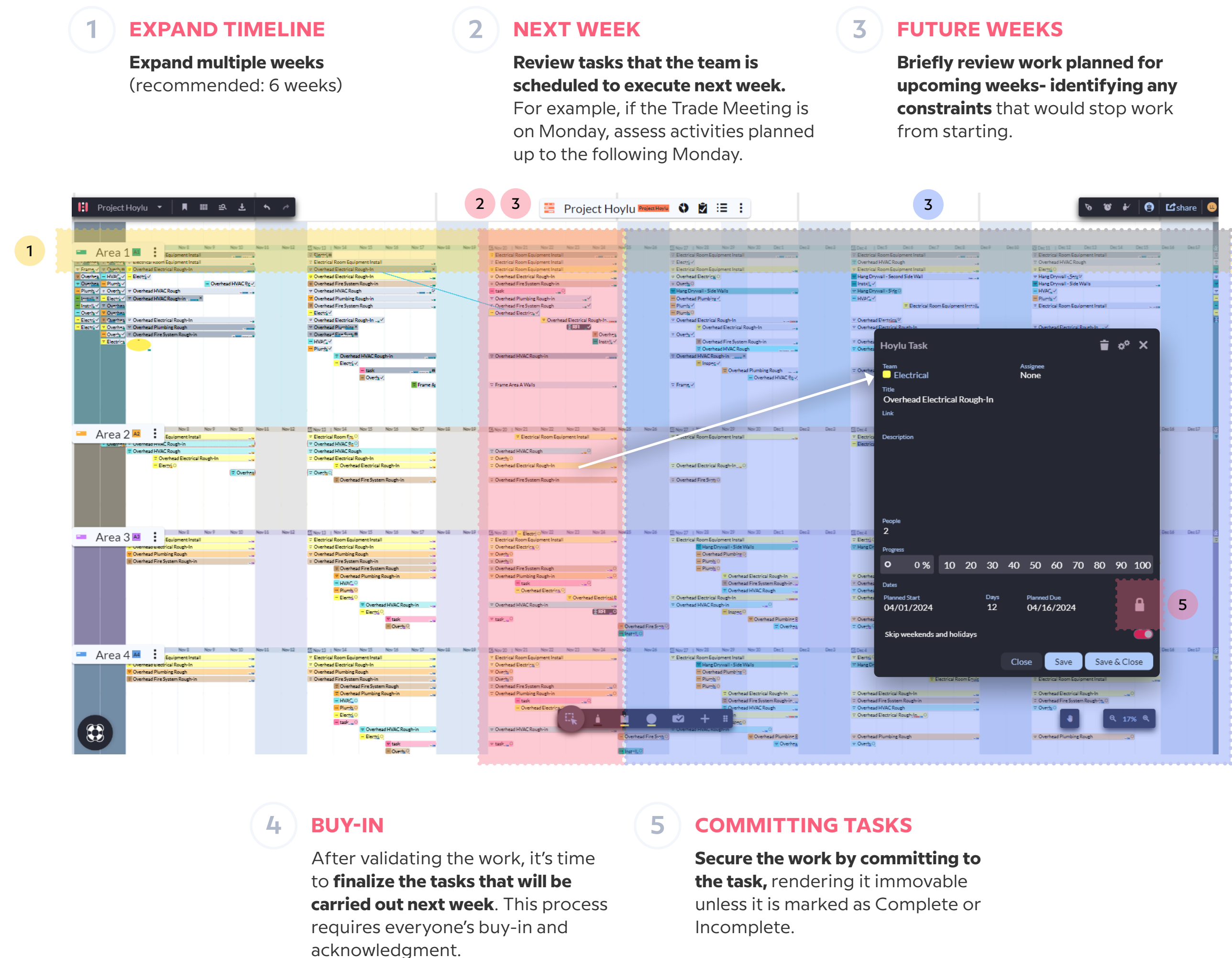
Required Date

Search

Constraint Title		Team	Created	Required	Promised	Completed		
Limited Site Entry Points	SITE		23-12-24	23-12-24	23-12-24	23-12-24		
Compliance with Seismic Regulations	SITE		23-12-24	23-12-24	23-12-24	23-12-24		
Electrician Shortage	ELEC		23-12-24	23-12-24	23-12-24	23-12-26		
Noise Ordinance in Residential Area	SITE		23-12-24	23-12-24	23-12-24	23-12-24		
Limited Building Height due to Zoning	CVEN		23-12-24	23-12-24	23-12-24	23-12-24		
Historical Facade Preservation	PRSV		23-12-24	23-12-24	23-12-24	23-12-24		

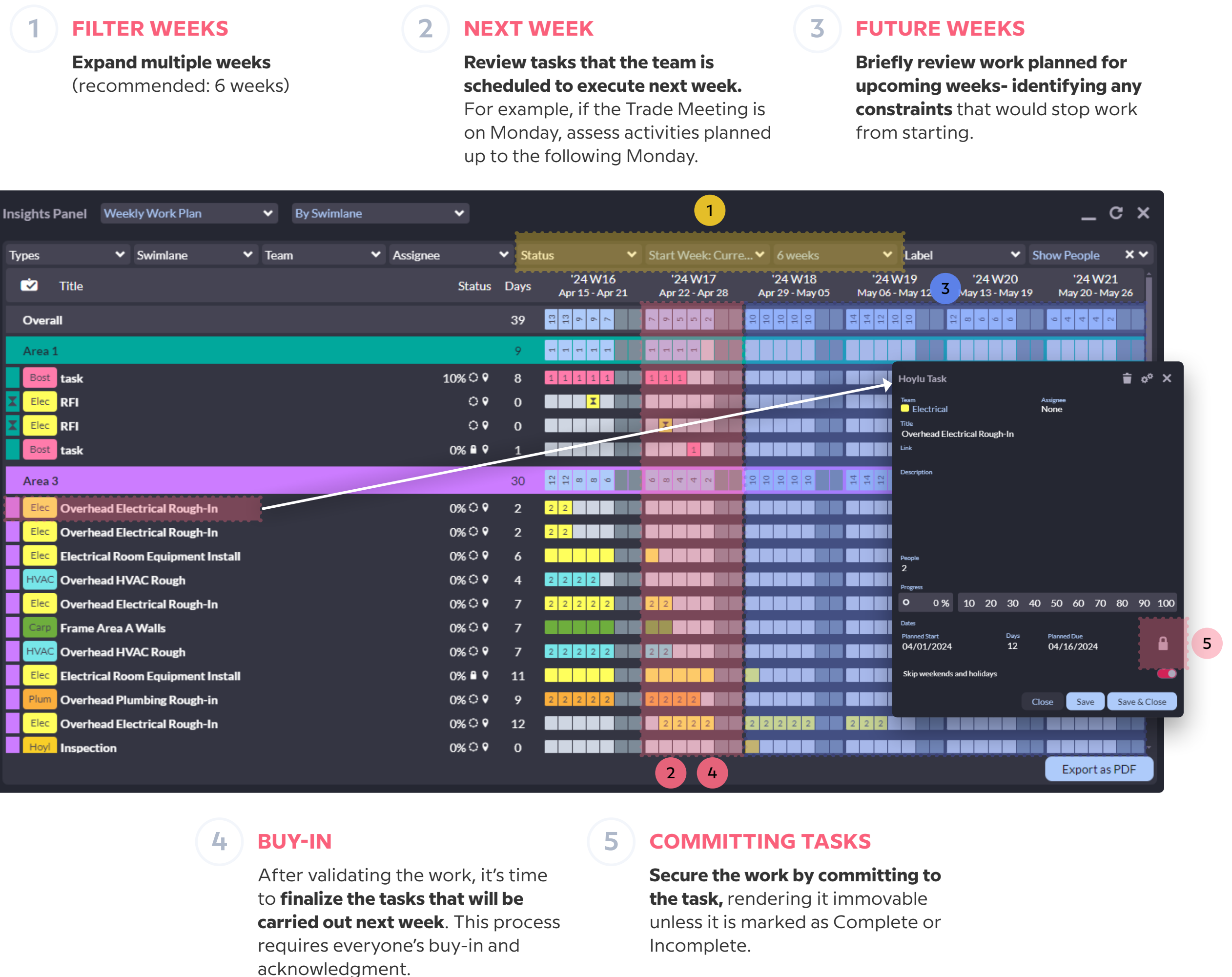
Coordination meetings (Workspace view)

Facilitating coordination meetings is key to aligning team efforts and ensuring projects progress smoothly. In these sessions, the facilitator reviews upcoming tasks, identifies potential roadblocks, and secures team commitments.



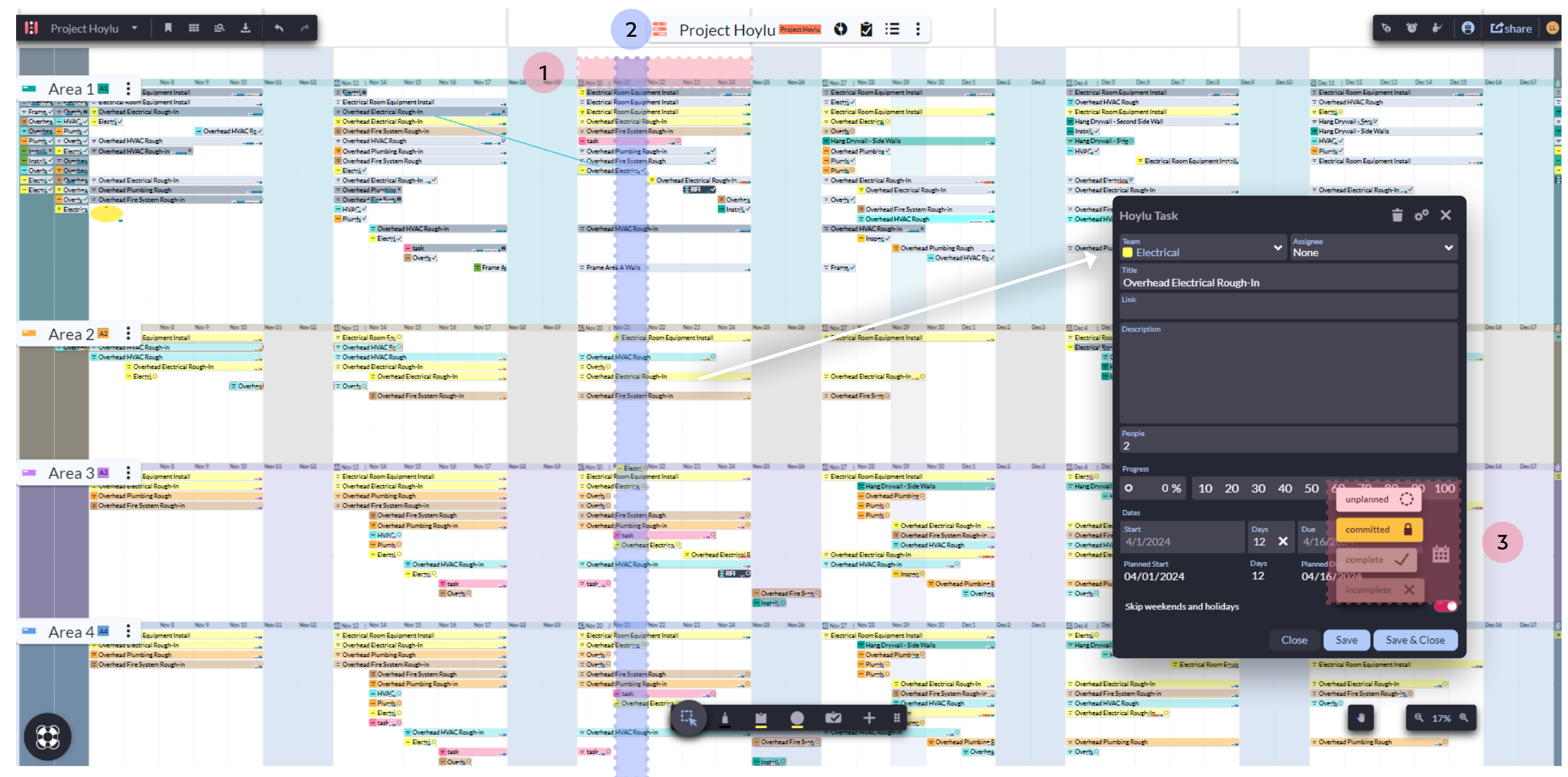
Coordination meetings (Weekly Work Plan view)

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Daily huddles (Workspace view)

In these brief meetings, team members quickly share updates on their progress and any immediate challenges. This routine promotes transparency and allows for quick adjustments to be made, ensuring that everyone remains aligned and focused on daily goals.



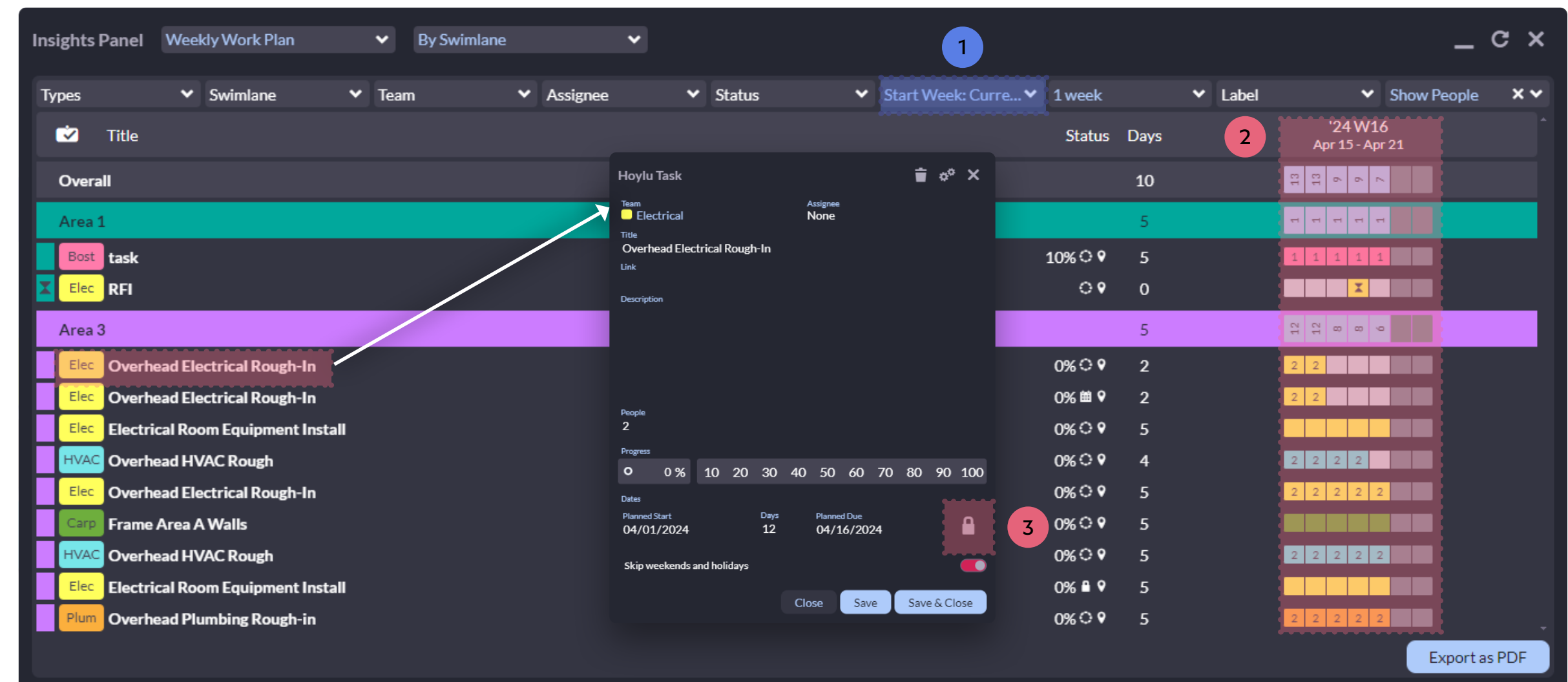
1 CURRENT WEEK
Navigate to the current week.

2 CURRENT DAY
Review work that is happening today. Discuss any Constraints or Roadblocks stopping work from happening today.

3 COMPLETE/ INCOMPLETE
Review and mark off any work that was **Complete/ Incomplete** the previous day.

Daily huddles (Weekly Work Plan view)

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1

CURRENT WEEK

Filter for the current week. Filter for "1 week".

2

CURRENT DAY

Review work that is happening today. Discuss any Constraints or Roadblocks stopping work from happening today.

3

COMPLETE/ INCOMPLETE

Review and mark off any work that was **Complete/ Incomplete** the previous day.

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.

1 TITLES

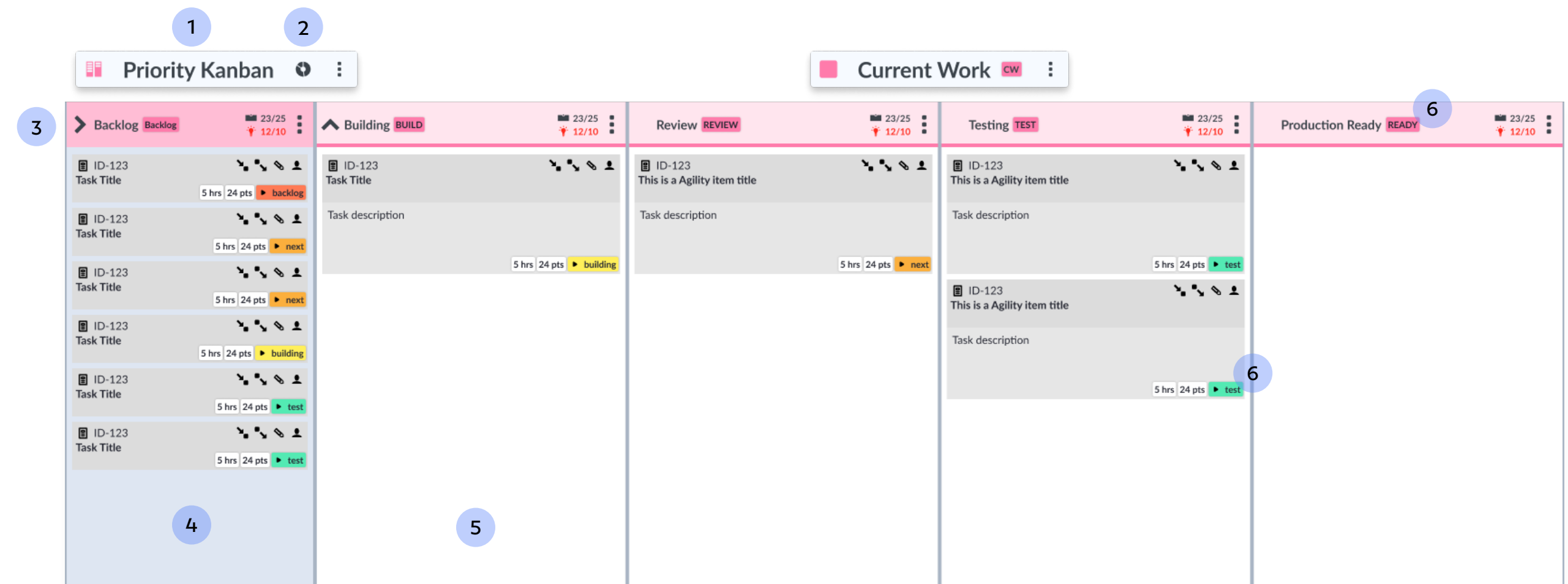
Naming your Board is important — especially if you have **multiple Plans or Boards in the same Workspace**.

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

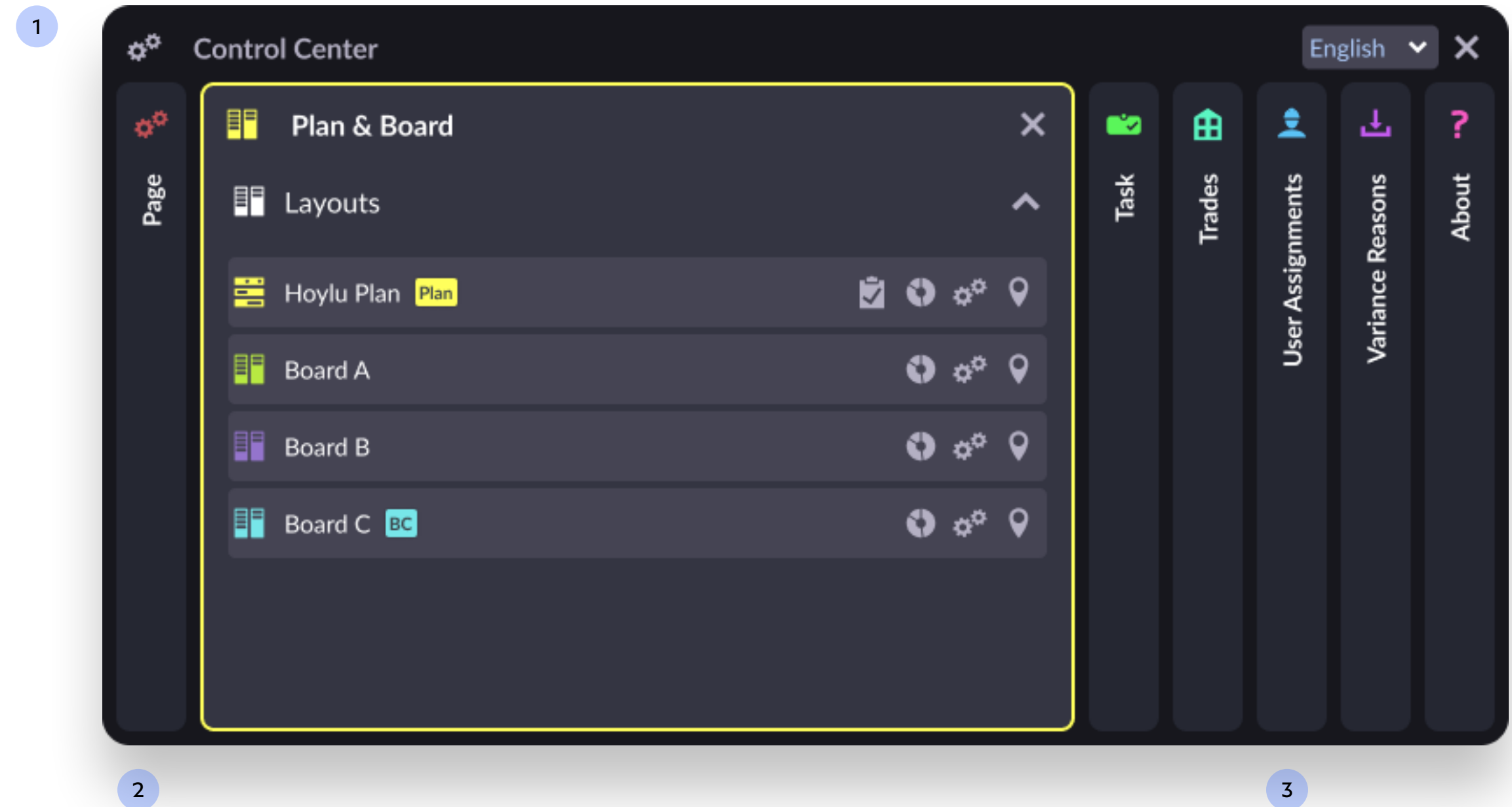
Manage Sections with **color-coding, labels, and task limits**.

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

