



NERTHOS NEXUS

# User Manual

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nerthos.com



## USER MANUAL

# Contents

|           |                                                                                     |            |
|-----------|-------------------------------------------------------------------------------------|------------|
| <b>01</b> | <b>Home</b><br><i>What needs me today?</i>                                          | <b>3</b>   |
| <b>02</b> | <b>Activity</b><br><i>What happened on my work while I was away?</i>                | <b>20</b>  |
| <b>03</b> | <b>My To-Do</b><br><i>Your private list for the small stuff.</i>                    | <b>31</b>  |
| <b>04</b> | <b>Tasks</b><br><i>If something needs doing by someone, this is where it lives.</i> | <b>41</b>  |
| <b>05</b> | <b>Calendar</b><br><i>When will I do this?</i>                                      | <b>56</b>  |
| <b>06</b> | <b>Time</b><br><i>Where did my week go?</i>                                         | <b>72</b>  |
| <b>07</b> | <b>Notes</b><br><i>Meeting notes, decisions, plans and half-finished thoughts.</i>  | <b>80</b>  |
| <b>08</b> | <b>Smart Lists</b><br><i>A table you design yourself.</i>                           | <b>93</b>  |
| <b>09</b> | <b>Goals</b><br><i>What are you working toward?</i>                                 | <b>108</b> |



SECTION 01

# Home

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*What needs me today?*



## SECTION 01

# Home

Home is the page you land on after you sign in. It answers one question: what needs me today? Everything on it is filtered to your work, and the layout is yours alone. Rearrange it however you like. Nobody gets a memo.

You can get back here from anywhere by clicking **Home** at the top of the left menu.

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**IN THIS GUIDE**

- |                                            |                              |
|--------------------------------------------|------------------------------|
| <b>01</b> Your first five minutes          | <b>08</b> Add more widgets   |
| <b>02</b> The lay of the land              | <b>09</b> The top bar        |
| <b>03</b> Your greeting and today's counts | <b>10</b> The left menu      |
| <b>04</b> Search: find anything, fast      | <b>11</b> If you're a guest  |
| <b>05</b> Make something new               | <b>12</b> Keyboard shortcuts |
| <b>06</b> Your widgets                     | <b>13</b> Common questions   |
| <b>07</b> Make Home Yours                  |                              |



# Your first five minutes

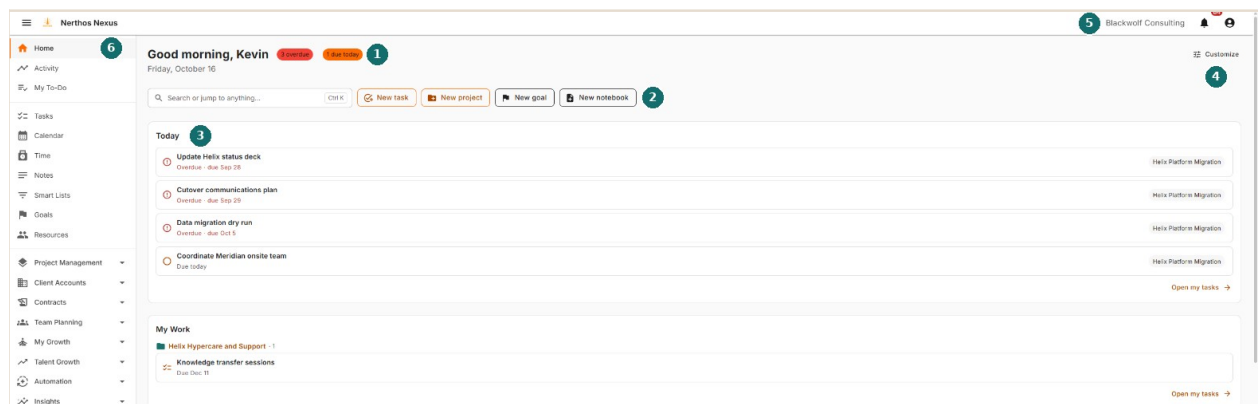
## QUICK START

If you read nothing else, do these four things:

- 1 Press Ctrl + K.** That opens search from any page in Nexus. It's the fastest way to get anywhere.
- 2 Star three things you open every day.** Open a task, project or note and click its **star**. They'll show up in **Favorites** on Home.
- 3 Click Customize** and move the widgets you care about to the top.
- 4 Hide anything you don't need.** You can bring it back later, exactly as it was.

That's it. You're now more organized than most people with a label maker.

# The lay of the land



Home, with the main areas numbered

- 1 Your greeting and today's counts.** A quick read on how the day is shaping up.
- 2 Search and the create buttons.** Find anything or start something new.
- 3 Your widgets.** The panels that make up most of the page. You choose which ones appear and where.



- 4 **Customize.** Where you rearrange the widgets.
- 5 **The top bar.** Your workspace name, the notification bell and your account menu. It follows you to every page.
- 6 **The left menu.** Every section of Nexus. It also follows you everywhere.

## Your greeting and today's counts

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Nexus greets you by first name, with the right time of day and today's date. It's a small thing. We're told people like small things.

When work needs you, counts appear beside the greeting:

- **Red, "3 overdue":** your tasks past their due date.
- **Orange, "2 due today":** your tasks due today.

Click either one to open your task list, filtered to just those tasks.

No counts at all? Nothing is overdue and nothing is due today. Don't question it. Walk away slowly.

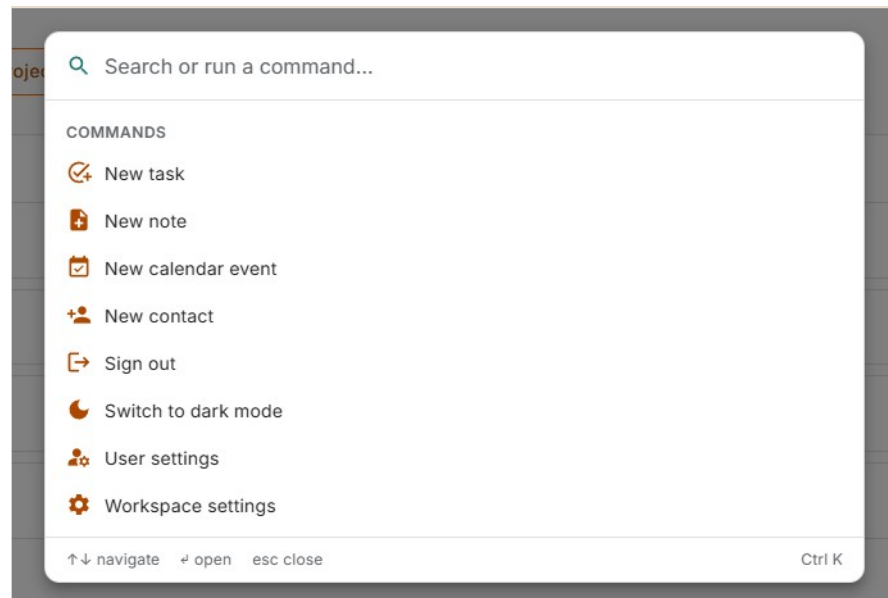
## Search: find anything, fast

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Click **Search or jump to anything** under the greeting, or press **Ctrl** + **K** on any page. Both open the same search window.



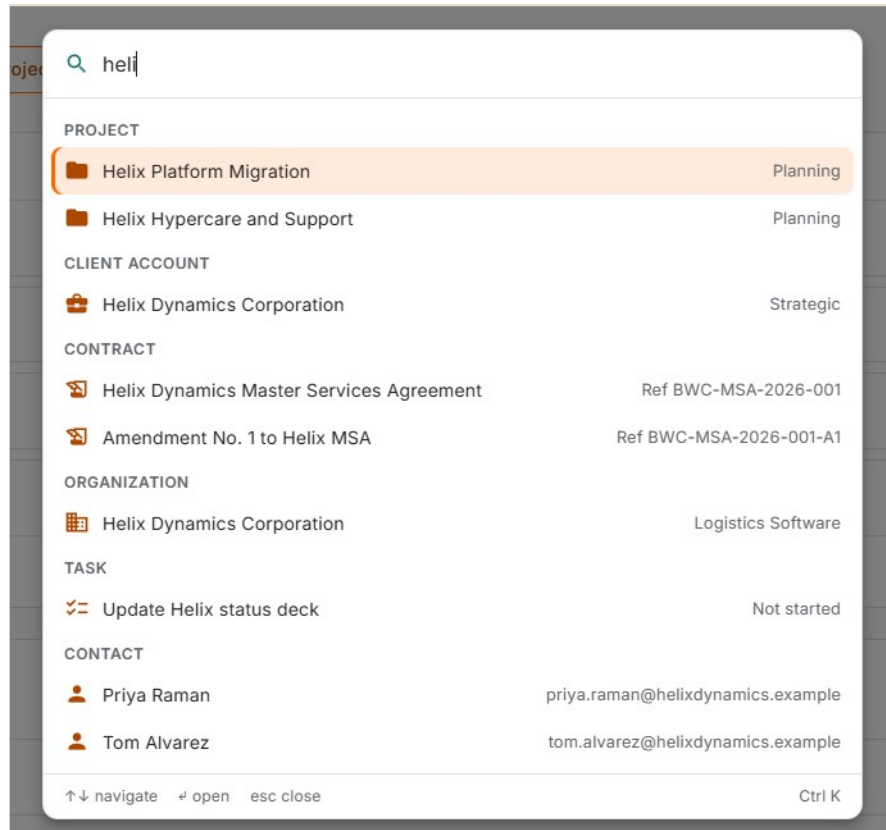
Before you type, it offers a short list of **Commands**: New task, New note, New calendar event, New contact, Sign out, switching between light and dark mode, User settings and Workspace settings.



*The search window before you type*



Start typing and results appear grouped by type: projects, client accounts, contracts, organizations, tasks, contacts and more, with a status or detail on the right. If what you typed matches a part of the app, you'll see it under **Pages** too.



*Typing "heli" finds everything Helix*

- **Up and Down arrows** move through the results.
- **Enter** opens the highlighted one. The top result is already highlighted, so typing a name and pressing Enter takes you straight there.
- **Esc** closes the window.

Mouse optional.



## Make something new

Next to search are four buttons for the things people create most.

| BUTTON       | WHAT HAPPENS                                                                                                                                                                         |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New task     | Opens the full task page. It's kept as a draft while you work and <b>Create</b> adds it to your tasks. <b>Discard</b> (or <b>Close</b> , once it's created) brings you back to Home. |
| New project  | Opens a short form right over Home.                                                                                                                                                  |
| New goal     | A short form for a goal: what it is, why it matters, a target date and who it's for.                                                                                                 |
| New notebook | A short form to start a notebook for your notes.                                                                                                                                     |

The project form shows how quick these are. Give it a name. Everything else is optional or already set to a sensible default.

*The New project form*

## Your widgets

Widgets are the panels that fill most of Home. Each one answers one question, like "what's due today?" or "what was I just doing?". Most lines in a widget are links, so click a task, project or note to open it.

A new Home starts with these six:



## Today

Everything that needs you today. Overdue tasks come first, in red, then tasks due today, then today's calendar events and time blocks. Each task shows its project on the right and **Open my tasks** at the bottom opens your full task list.

When the day is clear, Today says *"Nothing due today. Nice."* We stand by that.

## My Work

Tasks you've started that aren't due yet, grouped by project. A task shows up here when its status is **In progress** and it's either due later or has no due date at all. Once it's due today or overdue, it moves to **Today**, so the two never repeat each other.



Today and My Work

A task that's due next week but **Not started** won't appear on Home yet. You'll find it in your task list under **Later**.

## Notifications

Your latest notifications.

- Click one to open the thing it's about.
- Click the **tick** on the right to mark it read.
- **Mark all read** clears the lot. **See all notifications** opens your full history.



Nexus doesn't make you scroll past the same reminder twenty times. A reminder that keeps firing shows up once, with when it started and how many times it has fired: *"first asked Sep 27 · 20 reminders"*. Take the hint.



*The Notifications widget*

## Goals & focus

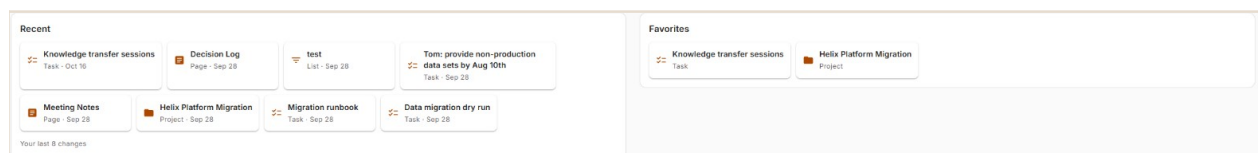
Objectives that were flagged at risk at their latest check-in. It only ever shows problems, so an empty Goals & focus is good news. This one appears only if your plan includes Goals.

## Recent

The last eight things you changed, anywhere in Nexus, newest first. For when you walked away mid-thought and can't remember what you were doing.

## Favorites

Everything you've starred, as quick links. To add something, open it and click its **star**.

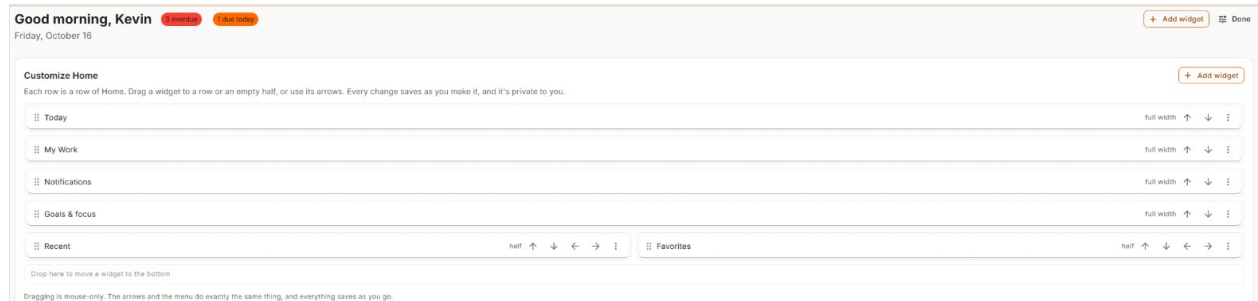


*Recent and Favorites, side by side*



# Make Home Yours

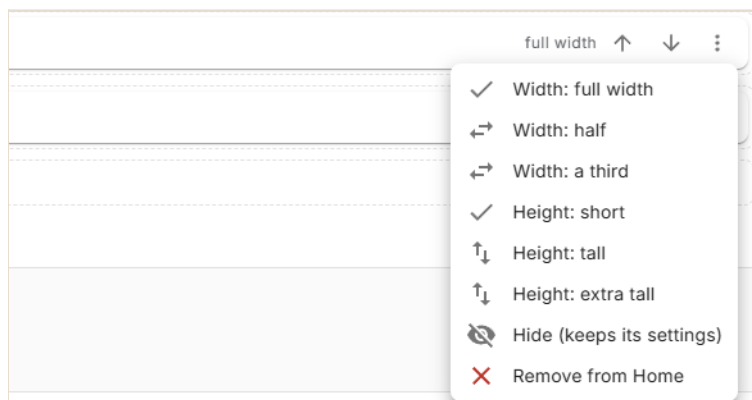
Click **Customize** at the top right. The **Customize Home** panel opens above your widgets, with one row per row of Home. Every change saves the moment you make it, so there's no Save button to forget. Click **Done** when you're finished.



*The Customize Home panel*

**Move a widget.** Drag it by its handle (the six dots) to another row, or into an empty half. Prefer the keyboard? The **up and down arrows** move a widget up or down the page, and the **left and right arrows** move a half-width widget from one side to the other. Dragging only works with a mouse. The arrows do exactly the same thing.

**Resize, hide or remove.** Click the **three dots** at the end of a row:



*The widget menu*

- **Width:** full width, half, or a third. Some widgets need more room, so not every width is offered for every widget.
- **Height:** short, tall or extra tall.
- **Hide (keeps its settings):** moves the widget into a **Hidden** list at the bottom of the panel. Click **Show** to bring it back exactly as it was.
- **Remove from Home:** asks you to confirm, then takes it off Home. If you add it again later, it comes back with its settings reset, and there's no undo.

**TIP**

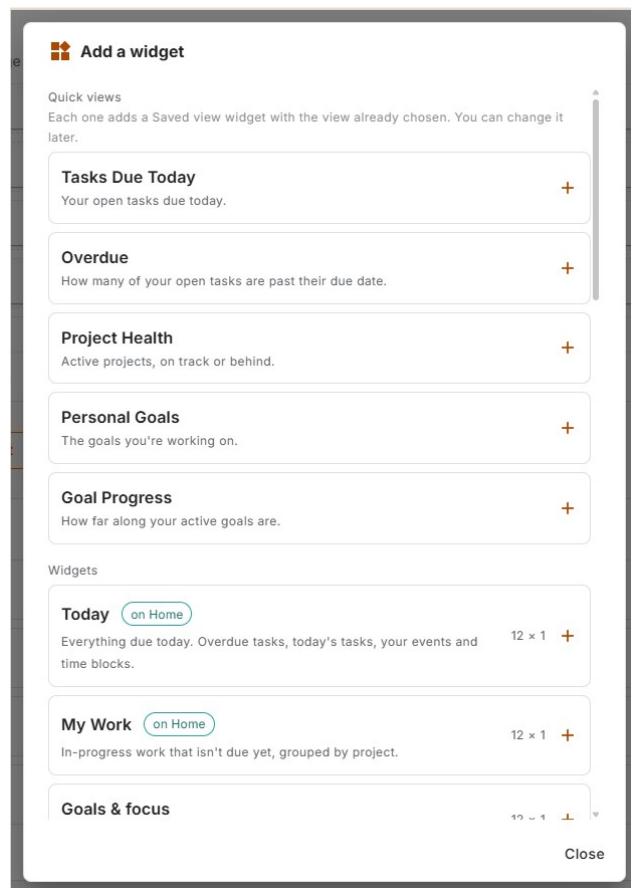
Free advice from people who've been there: if there's any chance you'll want a widget back, **Hide** it. Remove is for when you mean it.

While you're customizing, each widget on the page also gets its own three-dot menu. That's where you'll find **Configure** for widgets that have settings, like a saved view.

**Two of the same widget?** They get numbered, like *Active goals (1)* and *Active goals (2)*, so you can tell them apart.

## Add more widgets

While you're customizing, click **Add widget**. Anything already on your Home is marked **on Home**, and the + adds it.



*The Add a widget list*



**Quick views** are ready-made widgets with a common question already set up. Add one and you're done.

| QUICK VIEW      | SHOWS                                    |
|-----------------|------------------------------------------|
| Tasks Due Today | Your open tasks due today                |
| Overdue         | How many of your open tasks are past due |
| Project Health  | Active projects, on track or behind      |
| Personal Goals  | The goals you're working on              |
| Goal Progress   | How far along your active goals are      |

A quick view can show a list, a single number, health labels or progress bars. If a list has more than fits, it says so ("*Showing 5 of 23*") and gives you a **See all** link. To change what one shows, choose **Configure** from its menu while customizing. (A *saved view* is a set of filters you saved on a list page such as Tasks or Projects.)

**Widgets** are the fuller panels. Beyond the six Home starts with, you can add:

| WIDGET           | SHOWS                                                                    |
|------------------|--------------------------------------------------------------------------|
| Saved view       | Any saved view, as a list, a number, health labels or progress bars      |
| OKR Alignment    | Active objectives with their key results                                 |
| Risk Summary     | Risk levels and the biggest risks for a program or project               |
| Drift Alerts     | Projects that have slipped past a limit you're watching                  |
| Team Workload    | Who has too much on their plate this week                                |
| Recent Activity  | What's been happening across your workspace                              |
| Calendar Preview | What's on your calendar in the next 24 hours                             |
| Shared With Me   | Items other people have shared with you                                  |
| Notes            | Pages edited most recently, by you or anyone                             |
| Suggestions      | Suggestions for you, based on how you work, to accept, reject or put off |
| Low stock        | Stock items at their reorder point or below, most urgent first           |
| Recent movements | The newest stock changes: received, used, returned and counted           |
| Usage over time  | How much stock your work used each month, for the last six months        |



| WIDGET               | SHOWS                                                                        |
|----------------------|------------------------------------------------------------------------------|
| Stock value          | What your stock is worth today, per currency                                 |
| Contract Cycle Time  | Typical days from a contract being created to going active                   |
| Signature Turnaround | Typical days from sending a contract for signature to getting it back signed |
| Clause Risk          | How risky the clauses in your contracts are, by risk level                   |
| Contract Value       | Total and typical contract value, per currency                               |
| Renewal Pipeline     | Contracts coming up for renewal and how healthy they look                    |

You can also pin a report to Home. Open it in **Reports** and click **Pin to Home**. It keeps the filters it had when you pinned it.

#### NOTE

Some widgets depend on what your plan includes. If a widget isn't in your list, your plan doesn't include it. If your plan changes and a widget you had is no longer included, it stays where it is with a note saying so, and it comes back just as it was if the plan changes again.

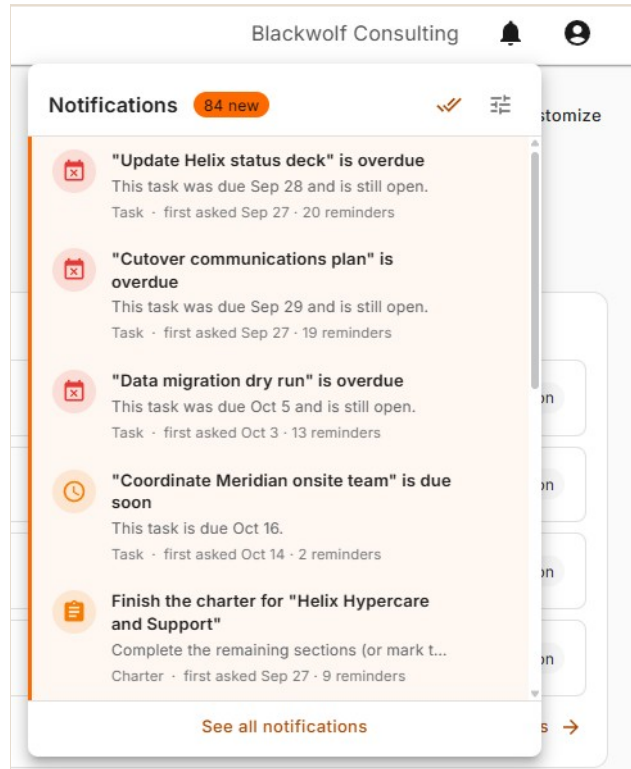
## The top bar

The bar across the top is on every page. On the right you'll see your workspace name, the **bell** and the **person icon**.



## The bell

The red number on the bell counts notifications that arrived since you last opened it. Opening the bell resets that number. Anything unread stays highlighted until you read it or mark it read.



*The bell's notification panel*

The two icons at the top of the panel mark everything read and open your notification preferences, where you choose what you hear about and how.

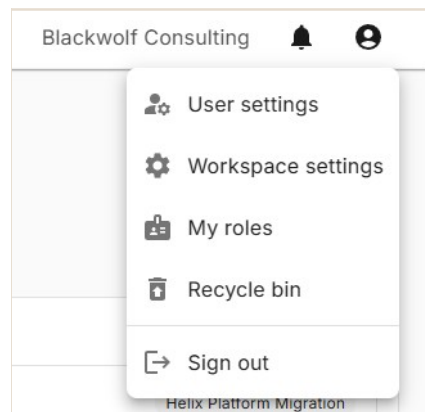
The bell, the Notifications widget and the full **Notifications** page all show the same notifications, grouped the same way. Mark something read in one place and it's read everywhere. On the full page you can also switch to **Unread only** and open a grouped reminder to see each time it fired.

Finished or cancelled a task? Its "due soon" and "overdue" reminders clean themselves up. Nobody likes being reminded about something they already did.



## Your account menu

Click the **person icon**:



*The account menu*

- **User settings:** your own preferences, like light or dark mode.
- **Workspace settings:** settings for the whole workspace.
- **My roles:** the roles you hold, and where you'll find out when you're given a new one.
- **Recycle bin:** where deleted items wait in case you change your mind.
- **Sign out:** see you tomorrow.

Two more items appear only when they apply. If you belong to more than one workspace, **Switch workspace** lists them. If someone has invited you to their workspace, the invitation shows at the top of the menu with a **Join** button, and the person icon gets a red badge so you don't miss it.

## The left menu

The left menu lists every section of Nexus.

- **The top group** (Home, Activity, My To-Do) is about you.
- **The next group** (Tasks, Calendar, Time, Notes, Smart Lists, Goals, Resources) holds your everyday tools.
- **The groups with arrows** (Project Management, Client Accounts, Contracts and the rest) open to show the pages inside them.

The **menu button** at the far left of the top bar hides the menu or shows it again, if you'd like more room.

What you see depends on your plan and your role, so a teammate's menu may not match yours.



## If you're a guest

If someone has invited you into their workspace as a guest, your Home is simpler. It shows what's been shared with you, and it has no Customize, search or create buttons. That's on purpose. You're visiting, and the house rules are theirs.

## Keyboard shortcuts

| KEYS                    | WHAT IT DOES                                    |
|-------------------------|-------------------------------------------------|
| <b>Ctrl</b> + <b>K</b>  | Open search from any page                       |
| <b>Alt</b> + <b>N</b>   | Write a quick note from any page                |
| <b>Up / Down arrows</b> | Move through search results                     |
| <b>Enter</b>            | Open the highlighted result, or run the command |
| <b>Esc</b>              | Close search                                    |

## Common questions

### Why is a widget empty?

Every empty widget tells you what would appear there. Favorites is empty until you star something. My Work is empty when none of your in-progress work is still ahead of its due date (if it's due today or overdue, it's in Today).

### Why doesn't a number on my Home match my teammate's?

Home counts only your own work and what you have access to. You can both look at the same widget, see different numbers, and both be right.

### Will my colleagues see my layout?

No. Your Home is yours.

### I removed a widget by mistake.

Add it again from **Add widget**. It comes back with its settings reset. Next time, try **Hide**.



## A widget says it isn't available on my plan.

Your workspace's plan doesn't include the part of Nexus that widget uses. Remove it or leave it where it is in case the plan changes.





SECTION 02

# Activity

---

*What happened on my work while I was away?*



## SECTION 02

# Activity

Activity is the running record of what happened in your workspace: what got created, finished, shared, commented on or moved to the recycle bin, and who was added to what. It's for the morning after a day off, when you'd like to know what happened without opening forty tasks to find out.

Open it from **Activity**, second in the left menu.

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**IN THIS GUIDE**

- |                                               |                                                |
|-----------------------------------------------|------------------------------------------------|
| <b>01</b> Three questions Activity answers    | <b>08</b> Reading the feed                     |
| <b>02</b> The lay of the land                 | <b>09</b> The end of the feed                  |
| <b>03</b> Show: whose activity?               | <b>10</b> When the feed is empty               |
| <b>04</b> Module: which part of Nexus?        | <b>11</b> Recent Activity on Home              |
| <b>05</b> Done by: who did it?                | <b>12</b> What gets recorded, and what doesn't |
| <b>06</b> When: how far back?                 | <b>13</b> Who can see what                     |
| <b>07</b> Clear filters, Refresh and the time | <b>14</b> Common questions                     |



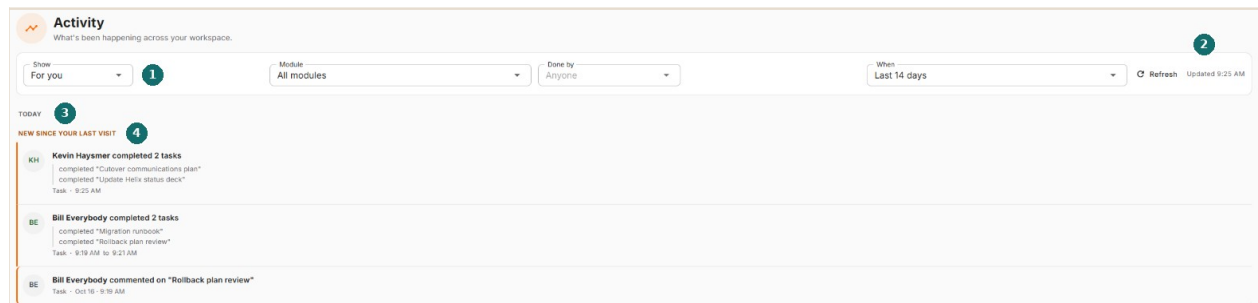
## Three questions Activity answers

### QUICK START

- 1 What happened on my work while I was away?** Open the page. It starts on your work, newest first, with a line marking where the news begins.
- 2 What's going on in one project?** Set **Show** to **A place** and pick it.
- 3 What did one person do?** Type their name in **Done by**.

And one thing you can stop worrying about: **Activity is read-only**. Nothing here changes, deletes or hides anything, and looking never changes the work it describes. Click around all you like.

## The lay of the land



*The Activity page, with the main areas numbered*

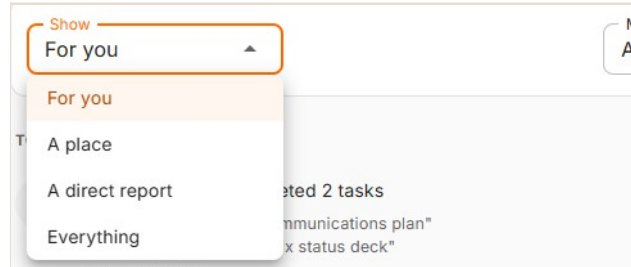
- 1 The filter bar.** Four controls that decide what you're looking at.
- 2 Refresh** and the time the page last loaded.
- 3 The feed.** What happened, newest first, grouped by day.
- 4 New since your last visit.** Everything above this line is news to you.

At the bottom of the feed you'll find **Load more**, or a line telling you you've reached the end.



## Show: whose activity?

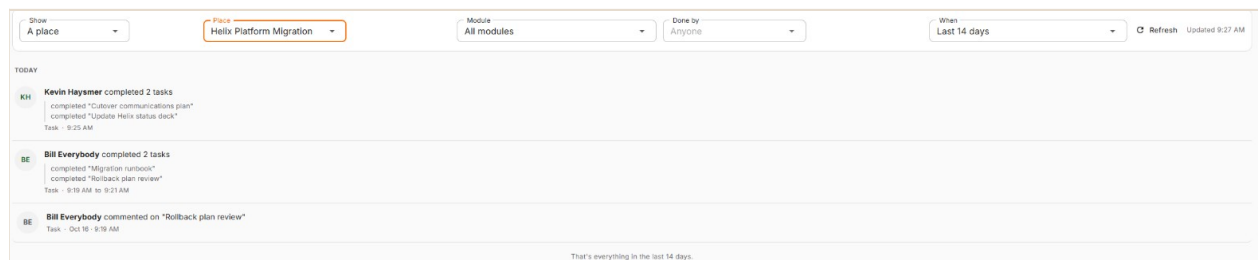
**Show** is the big one. The other filters narrow a list. This one picks which list you start from.



*The Show options*

| OPTION                 | WHAT YOU GET                                                                                                                                                     |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>For you</b>         | The default. Your own records, anything inside a project, program or portfolio you're on, and anything you did yourself.                                         |
| <b>A place</b>         | One project, program or portfolio and everything inside it. A <b>Place</b> box appears so you can pick which one. Offered if you're on at least one.             |
| <b>A direct report</b> | One person who reports to you, and the work they're part of. A <b>Who</b> box appears, showing each person's name and email. Offered if somebody reports to you. |
| <b>Everything</b>      | Everything in the workspace that you're allowed to see.                                                                                                          |

Here's **A place** pointed at one project. The feed is now that project's story, and nothing else:

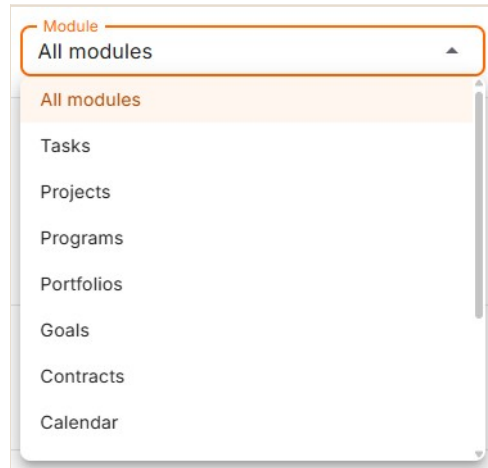


*Show set to A place*



## Module: which part of Nexus?

**All modules** by default. Pick one to see only that kind of work: Tasks, Projects, Programs, Portfolios, Goals, Contracts, Calendar, Notes, Smart Lists, Resources, Client accounts or Growth.



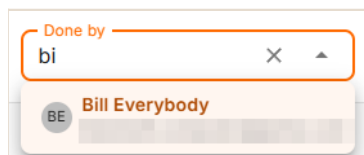
*The Module list*

Things that live inside something else are filed under their parent, because that's where you'd go looking. A risk on a project shows up under **Projects**. An opportunity shows up under **Client accounts**. Stock received or counted shows up under **Resources**.

**Growth** is personal. Everyone has the filter, and for most people it's empty. More on that under *Who can see what*.

## Done by: who did it?

Start typing a name or email and pick the person. Leave it on **Anyone** to see everybody.



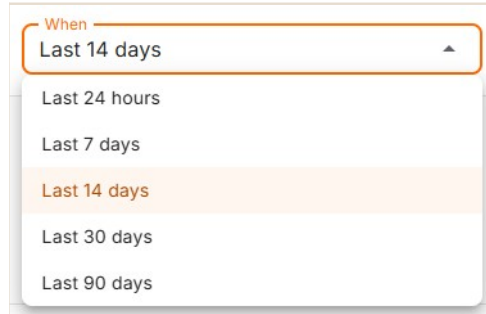
*Picking a person in Done by*

This is **who did the thing**, not who it was about. Filter to a colleague and you see what *they* did, not what was done to their stuff. Each person shows their email under their name, so two people called Alex don't become one Alex.



## When: how far back?

**Last 24 hours**, **Last 7 days**, **Last 14 days** (the default), **Last 30 days** or **Last 90 days**.



*The When options*

Ninety days is the limit, because activity is kept for ninety days and then cleared out. There's no "all time" option, since there's no all time to show. Think of it as a very organized goldfish.

## Clear filters, Refresh and the time

- **Clear filters** appears once you've changed Module, Done by or When, and puts those three back to their defaults. It leaves **Show** alone on purpose: that's a choice about what you're looking at, not a filter you forgot about.
- **Refresh** reloads the feed. The page doesn't update itself while you read. That's deliberate. Nobody likes the line they're reading jumping away from them.
- **Updated 9:25 AM** tells you how fresh the page is.

### TIP

Your filters live in the address bar, so you can bookmark a view you use a lot, or send the link to a teammate. They'll see the same filters applied to what *they* can access.

## Reading the feed

### Days

Rows sit under day headings. Today and yesterday get names. Older days get dates, and anything more than a year back includes the year.



## A single row

Each row is one thing that happened:

- The **circle** on the left has the initials of whoever did it.
- The **sentence** says who, what, and to which record.
- Underneath: the **kind of record** and **when**, in your own time zone.

Click anywhere on the row to open the record.

## Grouped runs

When someone does the same kind of thing several times in a row on the same day, the feed bundles it into one block, so one productive afternoon doesn't bury everyone else.

|    |                                                                                                                                       |
|----|---------------------------------------------------------------------------------------------------------------------------------------|
| KH | Kevin Haysmer completed 2 tasks<br>completed "Customer communications plan"<br>completed "Update Hella status deck"<br>Task - 9:25 AM |
| BE | Bill Everybody completed 2 tasks<br>completed "Migration runbook"<br>completed "Rollback plan review"<br>Task - 9:19 AM to 9:21 AM    |

*Two grouped runs in the feed*

The bold line counts the **records** involved, not the lines. Up to three detail lines show, then **and N more**. Each detail line is its own link. When the whole run is about one record, there's nothing to count, so the bold line just names it.

## Things in the recycle bin

A row about something that has since been deleted still shows up, marked **In the recycle bin**. It isn't a link, because there's no page to open. Restore it from the recycle bin and its rows become clickable again.



## New since your last visit

The **New since your last visit** line sits above the first row that arrived after you last opened the page.

TODAY

NEW SINCE YOUR LAST VISIT

BE

Bill Everybody completed "Migration runbook"

Task - Oct 16 - 9:21 AM

BE

Bill Everybody created 2 tasks

created "Old vendor contact sheet" In the recycle bin

added Bill Everybody to "Old vendor contact sheet" as Contributor In the recycle bin

created "Draft go-live announcement"

added Bill Everybody to "Draft go-live announcement" as Contributor

Task - 9:19 AM to 9:20 AM

BE

Bill Everybody completed "Rollback plan review"

Task - Oct 16 - 9:19 AM

BE

Bill Everybody commented on "Rollback plan review"

Task - Oct 16 - 9:19 AM

That's everything in the last 14 days.

*New since your last visit, with a run that includes a deleted task*

Opening Activity marks everything as seen, so next time the line moves down. The **Recent Activity** widget on Home shows unread rows in bold but never marks them seen, so a quick glance at Home won't cost you your place.

## The end of the feed

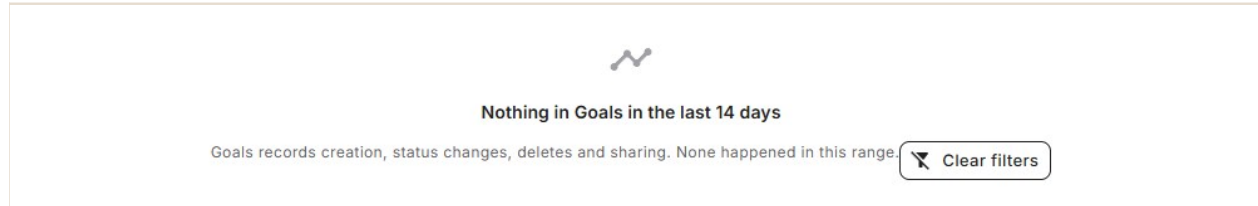
**Load more** brings in the next batch. When there's nothing left, the feed says so instead of just stopping:

- Most ranges: *"That's everything in the last 14 days."*
- At **Last 90 days**: *"That's everything. Activity before 18 July is not kept."* The date is the real ninety-day line, and it moves with the calendar.



## When the feed is empty

An empty feed tells you *why* it's empty, and usually offers the one button that helps.



*An empty feed that explains itself*

| WHAT IT SAYS                                                   | WHAT IT MEANS                                                                                                       |
|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <i>Nothing for you in the last 14 days</i>                     | Nothing happened on your work in that window. <b>Look back 90 days</b> is offered, or try <b>Show: Everything</b> . |
| <i>Nothing in Helix Platform Migration in the last 14 days</i> | That place was quiet. <b>Look back 90 days</b> is offered.                                                          |
| <i>Nothing for Alex in the last 14 days</i>                    | Your direct report was quiet in that window.                                                                        |
| <i>Nothing in Goals in the last 14 days</i>                    | That part of Nexus does record activity. There just wasn't any in this range.                                       |
| <i>No matching activity</i>                                    | Your filters are too narrow. <b>Clear filters</b> is right there.                                                   |
| <i>No activity yet</i>                                         | The workspace truly has no activity. New workspaces, this is you.                                                   |

## Recent Activity on Home

The **Recent Activity** widget you can add to Home is this same feed, shortened. It shows the latest rows from **For you**, which is also where this page opens, so a row you see on Home is still there when you click through. **See all activity** opens this page.

## What gets recorded, and what doesn't

Activity records things that **happened to work**. It is not a keystroke logger. Nobody wants to read "Alex fixed a typo" forty times.

**Recorded:**



- Something created, moved to the recycle bin, or restored
- Status changes that matter: a task completed, a contract sent for signature, signed, or its signature request cancelled, an opportunity moved along
- People added to or removed from a project, program, portfolio or task
- Something shared with someone
- Comments
- Records added to or removed from a parent, like a risk added to a project
- Stock received or counted

**Not recorded:**

- Editing a field: renaming, rewording a description, changing a date or priority
- Autosaves while you type
- Subtasks of a task that's already shown (they appear as detail lines under the parent instead)

## Who can see what

Every row is checked against your access at the moment you read it, not when it was written.

- You never see a row about something you couldn't open yourself. That includes **Everything**: widening the view never sneaks you in anywhere.
- If your access changes, the feed changes with it, in both directions.
- **Growth** rows reach only the person they're about, their management chain and an approver.
- Two people using the same filters will often see different feeds. Both are right.

**NOTE**

So if a row shows up under Everything and disappears when you switch back to For you, nothing is broken. That row belongs to work you're not part of.



## Common questions

---

### Why can't I see something I know happened?

Check three things, in this order: the **When** range (14 days by default), the **Show** setting, and whether it's the kind of change the feed records at all. A renamed task is a field edit, so it never appears.

### A row on Home disappeared when I clicked through.

Home and this page both open in **For you**. If you picked a narrower view earlier, the link kept it. Set **Show** back to For you.

### Why is Growth empty?

Those rows are private to each person and their management chain. Empty means nothing there for you, not broken.

### Can I see activity older than 90 days?

No. It's cleared after ninety days and can't be brought back from here.

### Does the page update itself?

No. Press **Refresh**. The time on the right tells you how current you are.

### Can a row become a notification?

No. Activity is something you go and read. Notifications come to you. They're kept apart on purpose.

### I opened the page and my "new since" line moved.

Opening Activity marks everything seen. Use the Recent Activity widget on Home to peek without clearing it.





SECTION 03

# My To-Do

---

*Your private list for the small stuff.*



## SECTION 03

# My To-Do

My To-Do is your private list for the small stuff: call the bank, renew the domain, buy the good coffee before Monday. It isn't project work, it doesn't need an owner, and nobody needs a status report on it.

It is **private**. Nobody else in the workspace can see it, administrators included, and nothing on it shows up in projects, reports, exports, search or the assistant. When something on it turns out to be real work, **Make it a task** hands it to the rest of Nexus.

Open it from **My To-Do**, third in the left menu.

---

## IN THIS GUIDE

- |                                   |                                         |
|-----------------------------------|-----------------------------------------|
| <b>01</b> The lay of the land     | <b>08</b> Deleting, and getting it back |
| <b>02</b> Adding a to-do          | <b>09</b> The Done pile                 |
| <b>03</b> How the list is grouped | <b>10</b> Making it a task              |
| <b>04</b> Changing a to-do        | <b>11</b> Your to-dos on the Calendar   |
| <b>05</b> Ticking a to-do off     | <b>12</b> When the list is empty        |
| <b>06</b> Repeating to-dos        | <b>13</b> Who can see it                |
| <b>07</b> Reminders               | <b>14</b> Common questions              |



# The lay of the land



*My To-Do, with the main areas numbered*

- 1 The header.** The **Only you** badge, and a count like *7 items open · 1 done*.
- 2 The Done switch.** Shows what you've ticked off. It appears once you've finished something.
- 3 The add box.** Type a to-do and press Enter.
- 4 Your list,** grouped by when things are due.
- 5 Up and down arrows** to reorder, and the **chevron** to open a to-do.
- 6 Small icons** after a title: a reminder is coming, it has notes, or it repeats.

## Adding a to-do

Type in **Add something to do...** and press **Enter**, or click **Add**. It lands at the top of the list with no due date. Open it to add anything else.

- Titles run up to **200 characters**. Past 150, a counter appears. At 200 the box stops taking more. Put the rest in **Notes**.
- Press Enter on an empty box and it says *"Type something to add first."* instead of quietly doing nothing.



# How the list is grouped

Open to-dos are grouped by due date, each group with a count:

| GROUP     | WHAT'S IN IT                           |
|-----------|----------------------------------------|
| Overdue   | Due before today                       |
| Today     | Due today                              |
| This week | Due in the next six days               |
| Later     | Due a week or more from now            |
| No date   | No due date yet                        |
| Done      | Only when the <b>Done</b> switch is on |

"Today" is **your** today, in your own time zone. A to-do due today stays under Today until midnight where you are, not where the server is.

## A single row

- **The box** ticks it off.
- **The title**, on up to two lines. Hover a long one to read it all.
- **Icons** after the title: a reminder is coming (hover for the time), it has notes, it repeats.
- **A flag** on the right when the priority is anything but Medium.
- **Under the title**, when it's due: *Today, Tomorrow, Monday, Nov 20, 14 days ago*.
- **↑ and ↓** move it within its group. The groups themselves follow the dates, so you can't reorder across them.
- **The chevron** opens it. Clicking the title does the same.



## Changing a to-do

Open a to-do to see everything about it:

*An open to-do*

- **Title and Notes.**
- **Priority:** Low, Medium, High or Urgent.
- **Due:** the date it's due.
- **Remind me on** and **Reminder time.** See *Reminders*.
- **Repeat.** See *Repeating to-dos*.
- **Delete:** the red bin at the right, beside the title.

**Your changes are kept when you move on.** Opening another to-do, clicking the open one's title, or closing it saves what you typed. If it can't be saved, for example because the title is blank, the to-do stays open and a message says why. **Save** saves and closes. **Cancel** is the only way to throw a change away.

Only one to-do is open at a time.

## Ticking a to-do off

Tick the box and it moves to **Done**. Untick it there and it comes back to the top of your open list.

A **repeating** to-do is different: ticking it moves it to its next date and keeps it open, with a little "Nice. Next one is due Oct 26." If you were behind on it, it jumps to the next date after today, not the one you already missed. No guilt trip.



## Repeating to-dos

A to-do can repeat **every day**, **every week** or **every month**. That's the whole menu, on purpose. Anything fancier (every other week, weekdays only, twelve times then stop) belongs on a task.

*Repeat, set to every week*

- 1 Give it a **Due** date first. Until it has one, Repeat is greyed out and says *"Set a due date first. The schedule is anchored on it."*
- 2 Turn on **Repeat** and choose **How often**:
  - **Every day**
  - **Every week, on Monday**: the same weekday as the due date.
  - **Every month, on the 14th**: the same day of the month as the due date.
- 3 The line underneath shows where ticking it will send it: *"Tick it and it moves to Mon, Oct 26."*

Due on the 29th, 30th or 31st? It lands on the last day of shorter months, then goes back to its day. Due on the 31st: Jan 31, Feb 28, Mar 31.

Changing the due date moves the schedule with it. Clearing the due date turns Repeat off.

## Reminders

Set **Remind me on** and, if you like, a **Reminder time**. Leave the time empty and it comes at 9:00 AM. Times are in your own time zone, which is named under the fields once you pick a date.

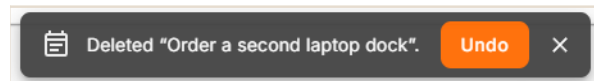
- When it's time, you get a notification in the bell, titled with the to-do. Click it to come back to your list.
- Email is off for to-do reminders unless you turn it on in **User settings → Notification preferences**, under **Personal → To-do reminder**.
- Reminders are checked every few minutes, so one can arrive a little after the time you set.



- You can't pick a time that has already passed.
- On a repeating to-do, the reminder moves with it and keeps the same gap. A reminder at 7:00 PM the evening before stays the evening before.

## Deleting, and getting it back

The **bin** on an open to-do deletes it straight away, and a message offers **Undo**:



*The Undo message after a delete*

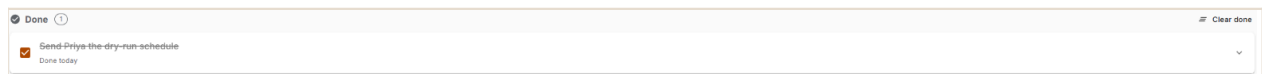
**Clear done**, at the top of the Done group, removes everything you've ticked off. It asks first and says how many, and the message afterwards also has **Undo**.

### HEADS UP

**Undo is the only way back.** Your to-dos are private, so they never go to the workspace recycle bin, where an administrator could see them. Undo works for a short while after you delete. Blink and it's gone, so decide quickly.

## The Done pile

Turn on the **Done** switch to see what you've ticked off, newest first, each with when you did it.



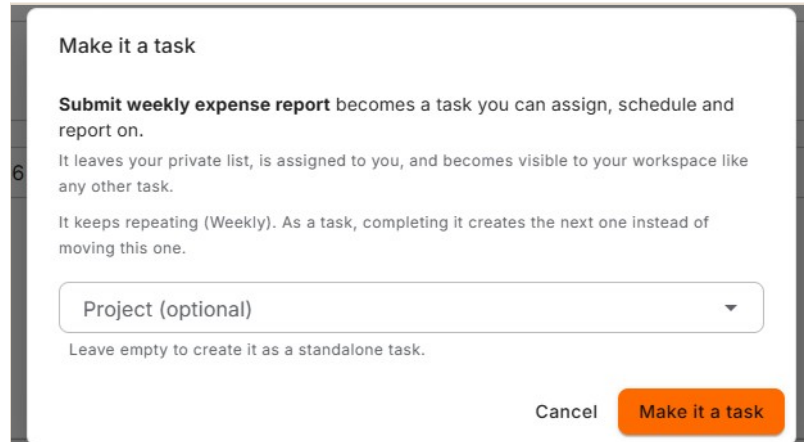
*The Done group*

The Done group shows your 50 most recent. If there are more, a line at the bottom says so: *"Showing the 50 most recent of 214 done."* The count in the header is always the real total. A repeating to-do also shows how often you've done it, like *done 4 times · last on Sep 2*.



## Making it a task

When a to-do turns out to be real work, open it and click **Make it a task**.



*The Make it a task dialog*

- File it under a project, or leave the project empty for a standalone task.
- The task is **assigned to you**, and only you. Reassign it from the task if someone else should do it.
- It keeps its title, notes, priority and due date.
- **A repeat carries over.** As a task, completing it creates the next one instead of moving this one. The dialog says so.
- **A reminder doesn't carry over.** Tasks notify you as the due date gets close and when it goes overdue instead. The dialog names the reminder you'd lose.
- Anything you'd typed but not saved is saved first.

The to-do then leaves your list, and the task is visible to your workspace like any other. This can't be undone from My To-Do. It lives with the tasks now.

## Your to-dos on the Calendar

A to-do with a due date also shows on **your own** Calendar, on the day it's due. Click it to jump to My To-Do, or drag it to another day and its due date moves with it. Nobody else sees it there either, it never prints, and it's never included in a calendar export.



## When the list is empty

---

- *"Nothing on your list. That's allowed."* You have no to-dos at all. Enjoy it.
- *"All clear."* Everything is done and the Done switch is off. It says how many are hidden, with **Show them**.
- *"Your list couldn't be loaded. Nothing has been lost."* Something went wrong reading it. Click **Try again**.

## Who can see it

---

Only you.

- No one else in the workspace can see your list or anything on it, whatever their role.
- To-dos never appear in search, the command palette, the recycle bin, projects, reports, exports or the assistant.
- A reminder notification goes to you alone.
- **Make it a task** is the one way something leaves the list, and only when you choose it.

### NOTE

If your account is under a legal hold, you can still read your list but not change it. You'll see *"This item is under a legal hold and cannot be changed."*

## Common questions

---

### My to-do shows as Overdue but it's due today.

It shouldn't. Groups follow your own time zone. If you see it, note the time and tell us.

### Why can't I set "every other week"?

To-dos repeat daily, weekly or monthly only. Make it a task for anything more.

### Why did my repeating to-do jump several days?

You ticked one you'd fallen behind on, so it moved to the next date after today instead of one that's already gone.



## Where did my deleted to-do go?

Nowhere anyone else can see. Use **Undo** straight away. There's no recycle bin for to-dos.

## Can I drag to-dos around the list?

No. Use ↑ and ↓. Order only applies within a group, because the groups follow the dates. (On the Calendar, you can drag one to a new day.)

## Why can't I type a longer title?

Titles stop at 200 characters. The rest goes in **Notes**.





SECTION 04

# Tasks

---

*If something needs doing by someone, this is where it lives.*



## SECTION 04

# Tasks

Tasks are the work itself. A task can live in a project or stand on its own, and it can carry subtasks, people, dates, dependencies, time, costs, notes, comments, files and risks. Once it exists, it shows up everywhere work is tracked: lists, boards, calendars, timesheets and reports. If something needs doing by someone, this is where it lives.

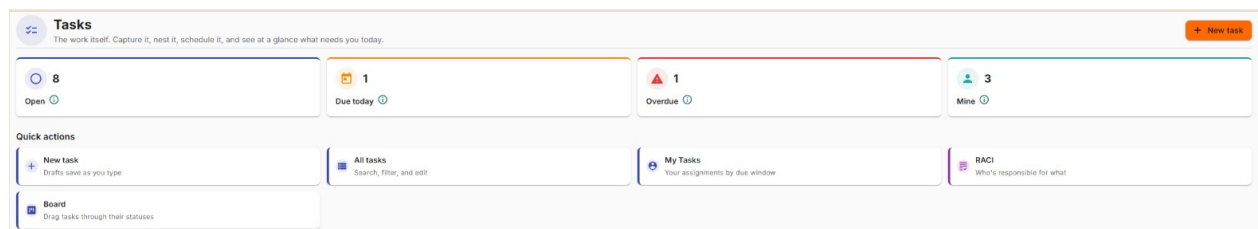
Open **Tasks** in the left menu. Everything in this guide starts there.

## IN THIS GUIDE

- |                           |                                  |
|---------------------------|----------------------------------|
| <b>01</b> The Tasks page  | <b>06</b> The task editor        |
| <b>02</b> All tasks       | <b>07</b> The right-hand side    |
| <b>03</b> My Tasks        | <b>08</b> The quick view         |
| <b>04</b> The board       | <b>09</b> RACI across everything |
| <b>05</b> Creating a task | <b>10</b> Common questions       |

## The Tasks page

The first page is a quick read of where things stand, and a door to everything else.



*The Tasks page*



The four numbers at the top are links:

| TILE      | WHAT IT COUNTS                                 | OPENS                  |
|-----------|------------------------------------------------|------------------------|
| Open      | Every open task you can see, subtasks included | All tasks, every level |
| Due today | Open tasks due today                           | All tasks, due today   |
| Overdue   | Open tasks past their due date                 | All tasks, overdue     |
| Mine      | Open tasks assigned to you                     | My Tasks               |

Hover the small i beside a tile to see exactly what it counts.

Quick actions go to **New task**, **All tasks**, **My Tasks**, **RACI** and the **Board**.

## All tasks

The full list of tasks you can see.

All tasks, with one task's subtasks open

### Reading the list

- The line under the title says what's being counted, like *8 open top-level tasks · 10 in all, subtasks included*.
- Each row shows the status icon, the name, and chips for **status**, **priority**, due date, subtask progress (1/3), project, tags and goal. **Waiting on 1** means another task has to finish first.
- A task with subtasks has an arrow on the left. Click it to see them indented underneath.
- **Show every level** lists every task flat, subtasks included. **Show as a tree** goes back.



- Click a row to open the **quick view** on the right. The expand icon on the row, or **Open full editor** in the quick view, opens the full task.

## Adding a task fast

The **Add a task and press Enter** box under the toolbar creates a task with just a name. If you've filtered to a project, the box says so and the new task lands in that project.

## Finding tasks

| CONTROL                | WHAT IT DOES                                                                        |
|------------------------|-------------------------------------------------------------------------------------|
| <b>Search tasks...</b> | Matches the name                                                                    |
| <b>Status</b>          | One or more statuses                                                                |
| <b>Priority</b>        | One or more priorities                                                              |
| <b>Due</b>             | Overdue, Due today, This week or No due date                                        |
| <b>Assignee</b>        | One person                                                                          |
| <b>Project</b>         | One project                                                                         |
| <b>Star</b>            | Favorites only                                                                      |
| <b>Show closed</b>     | Includes completed and cancelled tasks, which are hidden by default                 |
| <b>Sort</b>            | Recent, Due date, Priority, Name or Created. The arrow beside it reverses the order |

Every filter in use shows as a chip under the toolbar, and the **x** on a chip removes it. **Clear all** resets everything.

### TIP

**Your filters live in the address bar.** Bookmark it, send it to someone, or use Back and Forward, and the list comes back exactly as it was.

When nothing matches, the list says why and offers the fix: **Clear filters**, or **Show closed** when everything is finished.



## Changing several tasks at once

Tick the boxes on the left of the rows. A bar appears above the list:

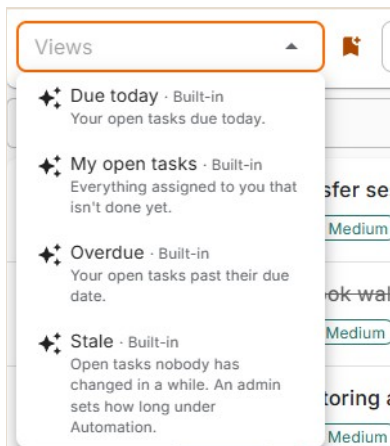


*The bar for selected tasks*

**Set status, Set priority, Assign to, Move to project or Complete** the lot in one go. **Clear selection** lets them all go.

## Views

A view is a saved set of filters. Pick one from **Views**.



*The Views list*

- **Built-in** views come with Nexus: *Due today*, *My open tasks*, *Overdue* and *Stale* (open tasks nobody has touched in a while; an administrator sets how long under Automation).
- **Yours** are views you've saved. Set up the filters, then click the **bookmark** icon beside Views to save them. Rename or delete your own from the same place.
- **Shared with everyone** views are visible to the whole workspace. Only administrators create, rename or remove these, and Nexus asks first, because everyone feels the change.

An administrator can also hide a built-in view. Hidden views are listed under **Hidden (N)**, where **Show ... again** brings one back.



# My Tasks

Everything assigned to you, grouped by when it's due: **Overdue**, **Today**, **This week**, **Later** and **No date**.

Tasks / My Tasks

**My Tasks**  
3 open assignments

... Show closed + New task

Add a task for yourself and press Enter + Add

**Overdue** 1

Data migration dry run  
Contributor In progress Urgent 1d overdue Helix Platform Migration

**Today** 1

Coordinate Meridian onsite team  
Contributor Not started Medium Due today Helix Platform Migration

**Later** 1

Knowledge transfer sessions ★  
Contributor In progress Medium Waiting on 1 Due Dec 19 9:2 Helix Hypercare and Sa...

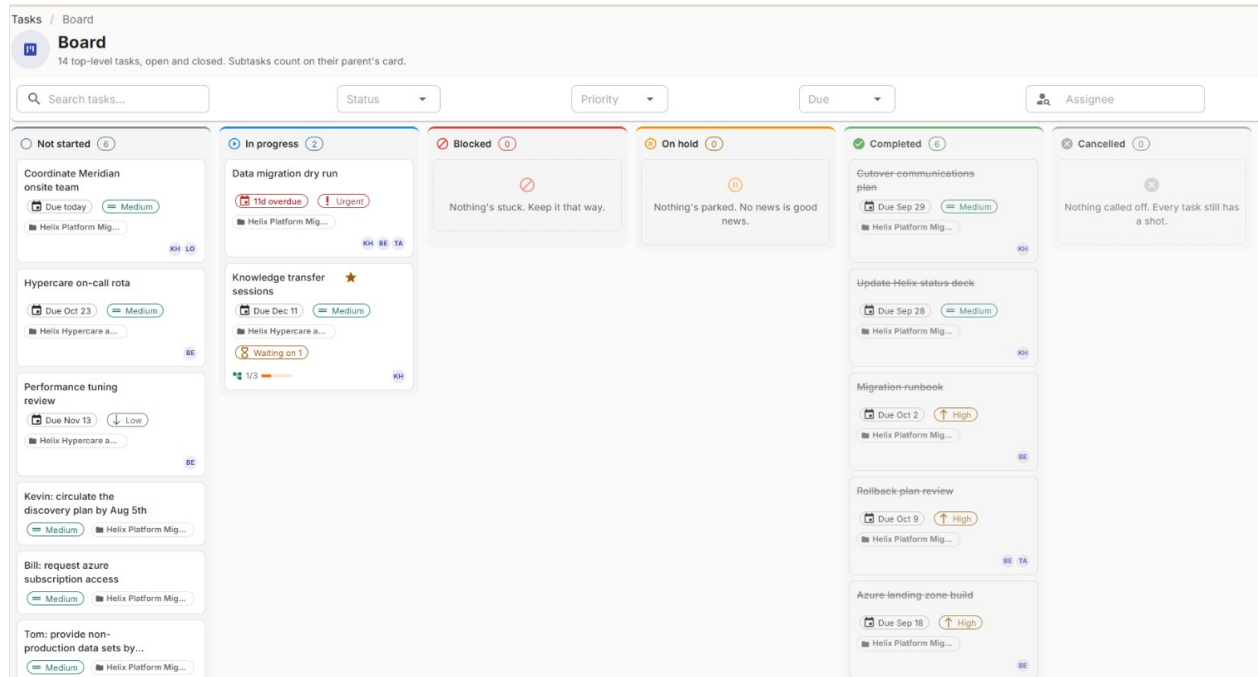
My Tasks

- Each row shows your role on it (**Owner**, **Contributor**, **Reviewer** or **Observer**), its status, priority and due date.
- **Add a task for yourself and press Enter** creates a task and assigns it to you in one step.
- **Show closed** adds a **Closed** group for work you've finished or cancelled.
- Nothing open? The page says how many finished tasks are hidden, with **Show closed**. Take the win.



# The board

The board shows tasks as cards, one column per status. **Drag a card to another column to change its status.** If the move can't be saved, the card slides back and a message says why.



The board

- The line under the title says what's on it: top-level tasks, open and closed. Subtasks count on their parent's card.
- Cards show due date, priority, project, *Waiting on*, subtask progress and the people on it.
- An empty column says so with a straight face: *"Nothing's stuck. Keep it that way."*
- The toolbar has **Search**, **Status**, **Priority**, **Due** and **Assignee**, plus **Favorites only** (the star) and the switch between list and board.

On the board of a project that runs **Scrum or Kanban**, there's more:

- **Swimlanes**: by assignee, by priority or by epic.
- **WIP limits**: the tune icon on a column sets how many cards it should hold. A column over its limit is marked. It's advice, not a locked door.
- Each card shows its **work item type** (Story, Bug, Spike, Epic or Task).



## Creating a task

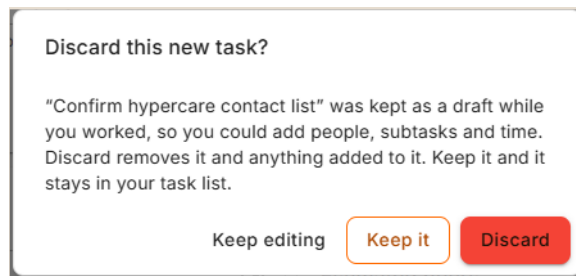
Click **New task**. A **name** is enough to start.

The moment you type, Nexus keeps the task as a **draft**, so you can add people, subtasks and time before you're done. The header says *Draft, not created yet*, and the main button says **Create**.



*A new task, still a draft*

Leave a draft and Nexus asks what you'd like:



*Discard this new task?*

- **Keep editing:** back to the task.
- **Keep it:** it stays in your task list.
- **Discard:** it, and anything you added to it, are removed.

### NOTE

A new task isn't assigned to anyone until you say so. **Assign me** is one click on the right.



# The task editor

The screenshot shows the 'Task editor' interface for a task named 'Knowledge transfer sessions'. The interface is divided into two main sections: a left sidebar for task details and a right sidebar for related information. The left sidebar contains sections for 'Basics' (Name, Description, Status, Priority, Tags, Project), 'Work item' (Type), 'Schedule' (Start date, Due date, Estimated hours, Scheduling rule, Repeat), and 'Subtasks'. The right sidebar contains sections for 'People' (Assignees, Responsibility), 'Plan' (Goal, Milestone, Calendar events, Dependencies), 'Cost and effort' (Time log, Resources and costs), and 'Context' (Notes, Comments, Files). Numbered callouts 1 through 8 point to specific elements: 1. Header (star, menu, close, save); 2. Basics section; 3. Schedule section; 4. Subtasks section; 5. People section; 6. Plan section; 7. Cost and effort section; 8. Context section.

The task editor, with the main areas numbered

- 1 **The header.** The star (favorite), the menu, the exit button, and **Save**.
- 2 **Basics.** Name, description, status, priority, tags and project.
- 3 **Schedule.** Dates, estimate, scheduling rule and repeat.
- 4 **Subtasks.**
- 5 **People.** Assignees and RACI.
- 6 **Plan.** Goal, milestone, calendar events and dependencies.
- 7 **Cost and effort.** Time log, and resources and costs.
- 8 **Context.** Notes, comments, files and risks.

The left side is the task itself. The right side is everything connected to it. A card with nothing in it folds down to one line with **Open**, so the page shows what the task actually has instead of a wall of empty boxes.

## Basics

- **Name and Description.**



- **Status:** Not started, In progress, Blocked, On hold, Completed or Cancelled.
- **Priority:** Low, Medium, High or Urgent.
- **Tags:** separate them with commas. Case is ignored, so Q3 and q3 are one tag. The chips under the field show exactly what will be saved.
- **Project:** pick one, or clear it to let the task stand alone. Subtasks move with their parent.

## Work item

On tasks in an **agile** project.

- **Type:** Task, Story, Bug, Spike or Epic.
- **Acceptance criteria**, for Story, Bug, Spike and Epic: what has to be true for the work to count as done. Up to 4,000 characters. Click **Save criteria**.
- Change a Story back to a Task and its criteria are **hidden, not lost**. Change it back and they return.

## Schedule

- **Start date, Due date and Estimated hours.**
- **As soon as possible** is the scheduling rule. **Set constraint...** changes it, for example to *Must start on a date*.
- **Repeat this task:** completing or cancelling a repeating task creates the next one automatically, with the same people, on the next date.

## Subtasks

Type a name and press Enter to add one. Each subtask has its own status and dates. Click its circle to complete it, or its name to open it. The count beside the heading shows how many are done.

## Saving, cancelling and leaving

- **Save** keeps your changes. **Ctrl** + **S** does the same.
- The exit button reads **Discard** on a new draft, **Cancel** when you have unsaved changes, and **Close** when there's nothing to lose. It always says what it's about to do.
- **Cancel** puts the fields back and stays on the task. A message offers **Undo** for a few seconds, for the "wait, no" moment.
- Leave with unsaved changes and Nexus asks inside the page, not with a browser pop-up.
- **If someone else saved the task while you were working**, Save stops and says so, with **Reload**. Nothing gets overwritten. Reload, look at their change, then make yours again.



The **:** menu holds **Delete**, which sends the task and its subtasks to the recycle bin, where it stays recoverable.

## The right-hand side

### People

**Assignees.** Who's doing the work. **Assign me** adds you; **Add someone** searches people you can see. Each person has a role (**Owner**, **Contributor**, **Reviewer** or **Observer**) that you change from the arrow beside their name.

**RACI.** Who is **R**esponsible, **A**ccountable, **C**onsulted and **I**nformed.

The RACI card

- Pick the role, search for the person, press Enter.
- There can be only one Accountable person. The card flags an empty key role: *No Responsible* or *No Accountable*.
- Nexus may **suggest** someone from the assignments. You accept or dismiss it; it never adds anyone on its own.
- **Apply a template** (the clipboard icon) fills the roles from a saved pattern.

### Plan

**Goal** and **Milestone.** Link the task to one of each.

**Calendar events.** Link meetings or events that belong to this task, so they're one click away.



**Dependencies.** What this task waits for (**Blocked by**) and what waits for it (**Blocking**). **Link a dependency** opens a dialog:

*Link a dependency*

- Choose the direction, then type at least two letters to find an **open** task.
- Choose the **type**. The sentence at the bottom explains it with the real task names, so there's no decoding *FS* in your head.
- **Lag** adds days of waiting (positive) or overlap (negative).
- Nexus refuses a link that would make a loop, and names the loop.

## Cost and effort

**Time log.** Log hours against the task: a date, billable or not, and for someone else if you're allowed to (**On behalf of**). The total shows, split by person when more than one has logged time. Entries can be edited or deleted any time, and delete has **Undo**. The Time guide covers the rest.

**Resources and costs.** People, equipment, materials and contacts linked to the task, with their costs, and the task's **tracked costs** total. Links that carry no cost (a contact, say) are marked **No cost**. Removing a link never deletes the record itself.

If the task uses stock **materials**, completing it asks you to **Confirm materials used**, so the stock count stays honest.

## Context

**Notes.** Notebook pages linked to this task. **+ New linked note** asks for a title, tells you where it will be filed (the project's notebook, or your own **My Notes**), and adds it without leaving the task.



**Comments.** A running conversation on the task. Edit or delete your own; a deleted comment stays recoverable for a while.

**Files.** Attach files. Click a file's name to download it.

**Risks.** What could go wrong. Choose **Probability** (1 Rare to 5 Almost certain) and **Impact** (1 Negligible to 5 Severe), and the score and band (Low, Medium, High, Critical) follow.

**Capture a lesson from this task.** Files a lesson learned on the task's project. It needs the task to be in a project.

**AI access.** Shown only when AI is on for your workspace. It controls whether AI features may read this task. **It doesn't change who can see or edit the task.**

**Record** shows when the task was created and last changed.

## The quick view

Click a task in a list or on the board, and a quick view slides in from the right.

**Data migration dry run** ☆ ×

In progress 11d overdue

Status: In progress Priority: Urgent

Start: 10/1/2026 Due: 10/5/2026

Project: Helix Platform Migration

As soon as possible Set constraint...

Description: Full rehearsal with record-count reconciliation

Tags: data, cutover

Assignees: Kevin Haysmer (Contributor), Bill Everybody (Contributor), Tom Alvarez (Contributor)

Goal: Link a goal

Milestone: Link a milestone

Notes: none yet Open

Resources: none yet Open

Time logged: none yet Log time

Dependencies: Blocking Knowledge transfer sessions (FS)

Created Sep 27, 2026 - 2:08 PM  
Modified Sep 28, 2026 - 12:09 PM

Open full editor

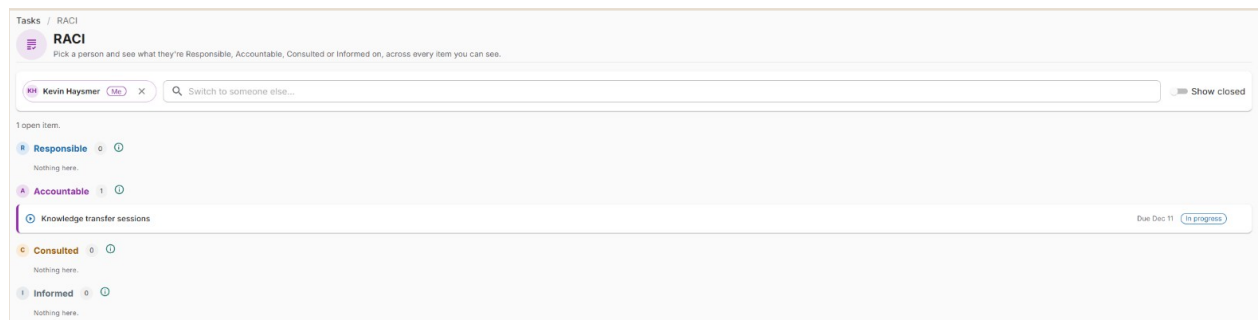
*The quick view*



Change the status, priority and dates, see the description, tags, assignees, goal, milestone, notes, resources, time and dependencies, and **Log time** without leaving the list. **Open full editor** goes to the whole task.

## RACI across everything

**RACI**, on the Tasks page, answers one question: *what is this person on the hook for?*



*RACI for one person*

- It opens on **you**. Search to switch to someone else.
- Their items are grouped by **Responsible**, **Accountable**, **Consulted** and **Informed**, each with a count.
- It shows **open work** by default. **Show closed** adds finished items, struck through, at the end.
- Within each role, blocked work comes first, then in progress, then the rest, soonest due first.
- **You only see what you're allowed to see**, even when looking at someone else. Their RACI never shows you a task you couldn't open yourself.

## Common questions

### Why don't the numbers match the list?

The tiles count subtasks; the list counts top-level tasks unless **Show every level** is on. The line under each title says which.

### Where are my finished tasks?

Hidden by default. Turn on **Show closed**.



## I created a task and it's not in My Tasks.

A new task isn't assigned to anyone until you say so. Open it and click **Assign me**, or use the add box on My Tasks, which assigns it to you.

## Why can't I see the Work item card?

It appears on tasks in an agile project.

## Why is there no AI access box?

AI is off for your workspace, or you've opted out of AI features.

## I marked a task *Never used by AI*. Can people still see it?

Yes. That setting only controls AI. Who can see a task comes from its project, assignments, RACI and sharing.

## Save said the task changed elsewhere. Now what?

Someone saved it after you opened it. Click **Reload**, check their change, and make yours again.

## Can I undo Cancel?

Yes, for a few seconds, from the message that appears.





SECTION 05

# Calendar

---

*When will I do this?*



## SECTION 05

# Calendar

The calendar is where your time lives: your meetings, the tasks due each day, your private to-dos, bills and renewals coming due, and the hours you've logged. It's also where you plan. Drag a task onto a day to schedule it, or onto an hour to block time for it.

Open it from **Calendar** in the left menu.

**IN THIS GUIDE**

- |                                            |                                                     |
|--------------------------------------------|-----------------------------------------------------|
| <b>01</b> Three things the calendar is for | <b>10</b> Events and tasks                          |
| <b>02</b> The lay of the land              | <b>11</b> Tasks and to-dos on the calendar          |
| <b>03</b> Your time zone                   | <b>12</b> My tasks                                  |
| <b>04</b> What to show                     | <b>13</b> Planning your day                         |
| <b>05</b> The views                        | <b>14</b> Printing and exporting                    |
| <b>06</b> Making an event                  | <b>15</b> Keeping Outlook in step                   |
| <b>07</b> The event panel                  | <b>16</b> When the calendar is empty, or won't load |
| <b>08</b> Repeating events                 | <b>17</b> Keyboard                                  |
| <b>09</b> Deleting an event                | <b>18</b> Common questions                          |

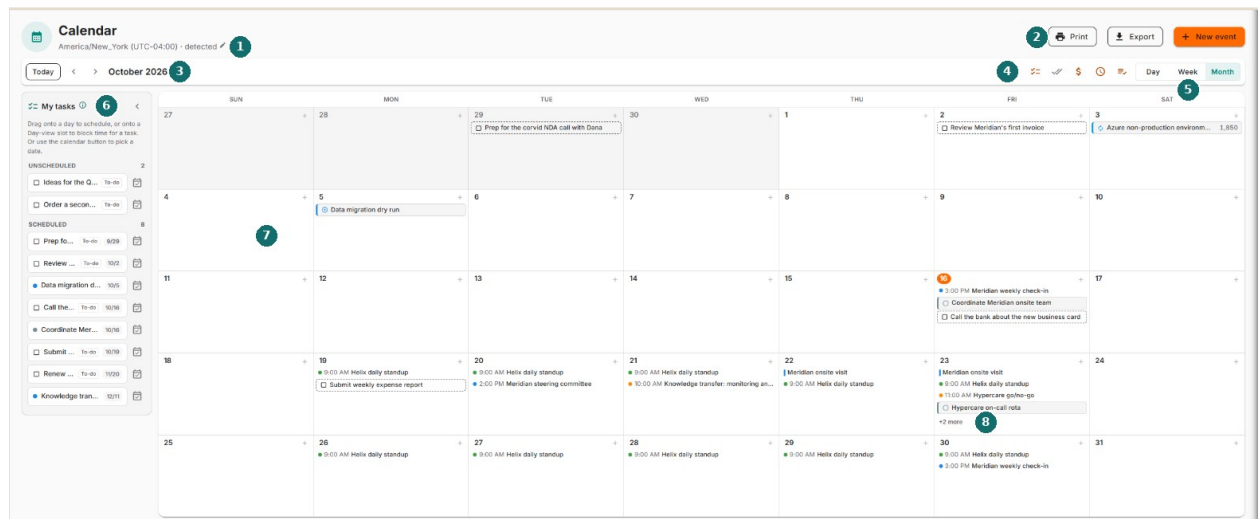


# Three things the calendar is for

## QUICK START

- 1 What's coming up?** Month for the big picture, Week for the next few days, Day for today.
- 2 When will I do this?** Drag a task from **My tasks** onto a day and it's scheduled. Its due date moves with it.
- 3 How does today actually fit?** Day view has a planner. Drag tasks onto it and see whether your plans and your hours agree. They often don't. Better to find out at 9 AM than at 4:55 PM.

## The lay of the land



The calendar in Month view, with the main areas numbered

- 1 Your time zone.** Everything on the calendar is shown in it. Click it to change it.
- 2 Print, Export and New event.**
- 3 Today, the arrows and the date range.** Today brings you back. The arrows move one day, week or month at a time.
- 4 What to show.** Five small switches that turn whole layers on and off.



- 5 **Day, Week and Month.** The calendar remembers the view you used last.
- 6 **My tasks.** Your open tasks and to-dos, ready to drag onto the calendar.
- 7 **The calendar itself.**
- 8 **+2 more.** When a day in Month view holds more than fits, this lists the rest without leaving the month.

## Your time zone

The line under the title reads something like *America/New\_York (UTC-04:00) · detected*.

"Detected" means Nexus is using your browser's time zone because you haven't picked one.

Click the line to open **Calendar time zone**. Pick a zone and **Save**, and the calendar (and anything you export from it) uses that zone from then on, on any device. **Use detected** appears once you've saved a choice and hands control back to your browser.

### TIP

Useful when you travel. Your 9 AM call stays your 9 AM call, wherever you wake up.

## What to show

The five icons left of **Day, Week, Month** each turn a layer on or off. Nexus remembers every choice.

| SWITCH                       | SHOWS                                                                          | STARTS |
|------------------------------|--------------------------------------------------------------------------------|--------|
| Show due tasks               | Your open tasks, on the day they're due                                        | On     |
| Include completed tasks      | Finished and cancelled tasks too, struck through (only while due tasks are on) | Off    |
| Show bills and subscriptions | Bills on their due day and subscriptions on their renewal day, with the amount | On     |
| Show logged time             | Hours you've logged, on the day you logged them                                | Off    |
| Show my to-dos               | Your private to-dos, on their due day                                          | On     |



Hover an icon and it tells you what it does and whether it's on.

## The views

### Month

Each day shows its first few items. **+2 more** (or however many) opens the rest in a small list. Click a day's number to open that day. The **+** in a day's corner starts a new event on that day, set to **All-day**. Turn All-day off if it's a meeting.

### Week

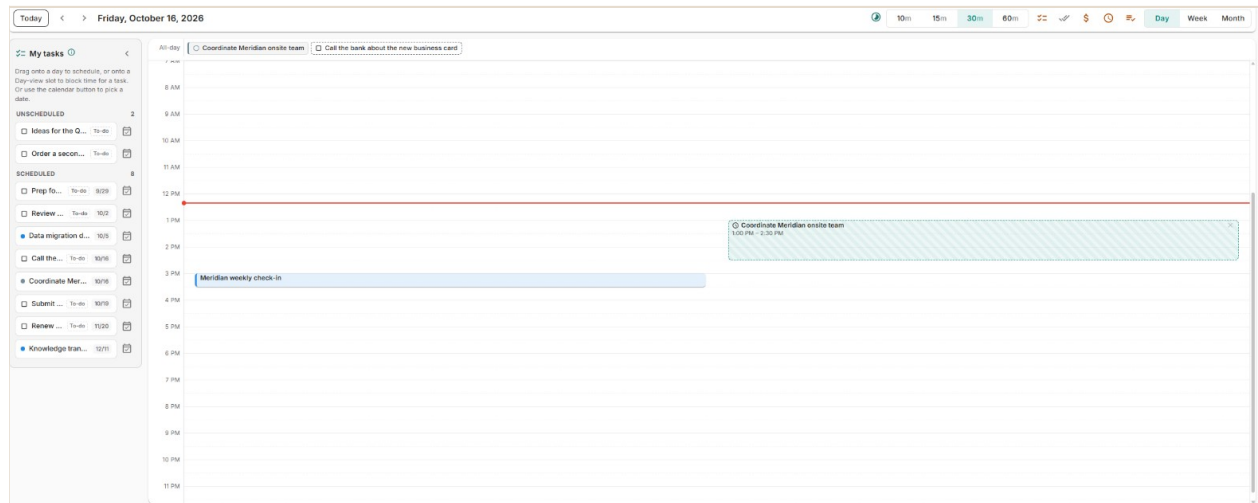
|         | SUN<br>18 | MON<br>19                                             | TUE<br>20                                        | WED<br>21                                                        | THU<br>22                                      | FRI<br>23                                                                                         | SAT<br>24 |
|---------|-----------|-------------------------------------------------------|--------------------------------------------------|------------------------------------------------------------------|------------------------------------------------|---------------------------------------------------------------------------------------------------|-----------|
| All-day |           | <input type="checkbox"/> Submit weekly expense report |                                                  |                                                                  | <input type="checkbox"/> Meridian onsite visit | <input type="checkbox"/> Meridian onsite visit<br><input type="checkbox"/> Hypercare on-call rota |           |
| 7 AM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 8 AM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 9 AM    |           | Helix daily standup                                   | Helix daily standup                              | Helix daily standup                                              | Helix daily standup                            | Helix daily standup                                                                               |           |
| 10 AM   |           |                                                       |                                                  | Knowledge transfer: monitoring and alerts<br>10:00 AM - 11:30 AM |                                                |                                                                                                   |           |
| 11 AM   |           |                                                       |                                                  |                                                                  |                                                | Hypercare go/no-go                                                                                |           |
| 12 PM   |           |                                                       |                                                  |                                                                  |                                                | Team lunch<br>12:00 PM - 1:00 PM                                                                  |           |
| 1 PM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 2 PM    |           |                                                       | Meridian steering committee<br>2:00 PM - 3:00 PM |                                                                  |                                                |                                                                                                   |           |
| 3 PM    |           |                                                       |                                                  |                                                                  |                                                | Meridian weekly check-in                                                                          |           |
| 4 PM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 5 PM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 6 PM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 7 PM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 8 PM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 9 PM    |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 10 PM   |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |
| 11 PM   |           |                                                       |                                                  |                                                                  |                                                |                                                                                                   |           |

Week view

All-day things sit in a row across the top: all-day events, due tasks, to-dos, bills. Timed events sit in the grid below, at their time, in their category's color.



## Day



Day view, with an hour and a half blocked for a task

The same all-day row, then the day itself. Events are on the left half. The right half is your **planner**, where time blocks go (see *Planning your day*). The buttons **10m**, **15m**, **30m**, **60m** set how finely the planner is divided.

## Reading an item

Hover any item to see its full title and time. An event that runs past midnight shows its start on the first day and *until 6:00 AM* on the next. A day it runs straight through says *all day*.



# Making an event

Click **New event**, or the **+** on a day in Month view.

**New event**

Title\*  
Meridian weekly check-in

☐ All-day

Starts  
10/16/2026

Starts time  
3:00 PM

Ends  
10/16/2026

Ends time  
3:30 PM

Category  
Client meeting

+ New category Manage categories

Location  
Microsoft Teams

Description  
Status, risks and next steps with the Meridian team.

☒ Task

Link a task

An event links to one task. On Pro, Log this time adds the event's hours to that task. In a repeating series the link belongs to this one event, whichever events the save applies to.

Reminder  
15 min before

Sensitivity  
Internal

Repeat this event

Frequency  
Weekly

Repeat every  
1 week

Ends  
Never

Repeat on  
Mon Tue Wed Thu **Fri** Sat Sun

Weekly on Fri

Next dates:

Fri, Oct 23, 2026 Fri, Oct 30, 2026  
Fri, Nov 6, 2026 Fri, Nov 13, 2026  
Fri, Nov 20, 2026

Cancel Create event

*A new event, set to repeat every  
Friday*

- **Title.** The only thing you must fill in.
- **All-day**, or a start and end. Type times however you like: 2:30 PM, 230p and 1430 all work. Move the start and the end moves with it, keeping the same length.
- **Category.** Colors the event. See *Categories* below.
- **Location** and **Description.**
- **Task.** **Link a task** ties the event to the work it's for. See *Events and tasks*.
- **Reminder.** From *At start* to *1 day before*.
- **Sensitivity.** Public, Internal, Confidential or Restricted.
- **Repeat this event.** See *Repeating events*.



Click **Create event**. If the end is before the start, the editor says *"Ends must be after Starts."* right under the fields, before you get as far as saving.

If someone else saved a change to the same event while you were editing, Nexus keeps what you typed and offers to load their version, instead of quietly overwriting one of you.

## Categories

A category is a name and a color. There are two kinds:

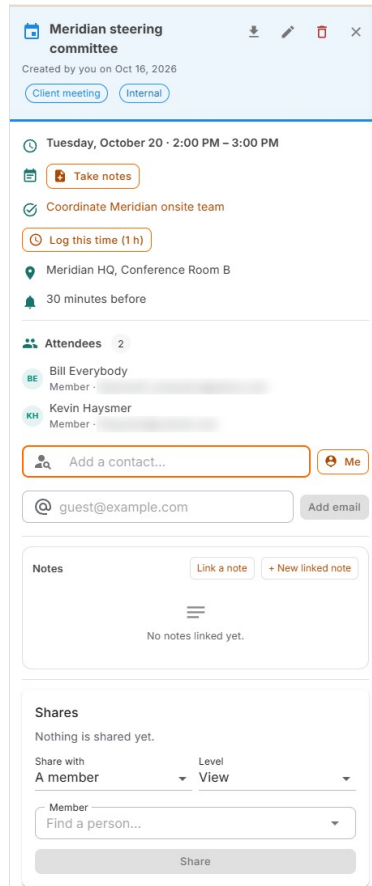
- **Workspace categories.** Everyone sees them. Only owners and administrators can create them.
- **My categories.** Yours alone. Anyone can create them.

**New category** creates one right inside the editor. **Manage categories** lets you rename, recolor or delete the ones you're allowed to change. Delete a category and its events stay exactly where they are. They just lose the color.



# The event panel

Click an event to open its panel.



*The event panel*

- **At the top:** who created it and when, and chips for its category, whether it repeats, and its sensitivity (the last chip).
- **Icons:** export it as a calendar file, **edit** it, **delete** it, close the panel.
- **When and where**, and the reminder.
- **Take notes** starts a meeting notes page for this event, filed in your notes and linked back here. Once there are notes, the button becomes **Open meeting notes**.
- **The linked task**, and **Log this time**. See *Events and tasks*.
- **Attendees.** Add people from your workspace or your contacts with **Add a contact...**, or yourself with **Me**. Each shows their email, so two people with the same name stay two people. Anyone outside Nexus can go in by email address. They're recorded, not notified.
- **Notes** linked to the event, and **Shares**, for giving someone view, comment, edit or admin access.



Adding a workspace member as an attendee puts the event on their calendar, view-only.

If you can view an event but not change it, the panel says so, and who to ask: *"You can view this event. Ask Kevin Haysmer to change it."* No guessing whose meeting it is.

**Esc** closes the panel and puts you back where you were.

## Repeating events

Turn on **Repeat this event**, then choose:

- **Frequency:** Daily, Weekly, Monthly or Yearly.
- **Repeat every:** 1 week, 2 weeks and so on.
- **Repeat on:** which days, for a weekly event.
- **Ends:** Never, After a number of times, or On a date.

The box underneath spells it out (*Weekly on Mon, Tue, Wed, Thu, Fri, 10 times*) and lists the next few dates, so you can check before you commit.

A repeating event keeps to the time zone of the person who created it. A 9 AM standup stays at 9 AM when the clocks change.

### Changing one, some or all

Save a change to an event in a series and Nexus asks how far it goes:

Save recurring event

This event repeats. Apply your changes to:

"All events" changes the whole series, first event included; a time change moves every event by the same amount. Events you already edited on their own are left as they are.

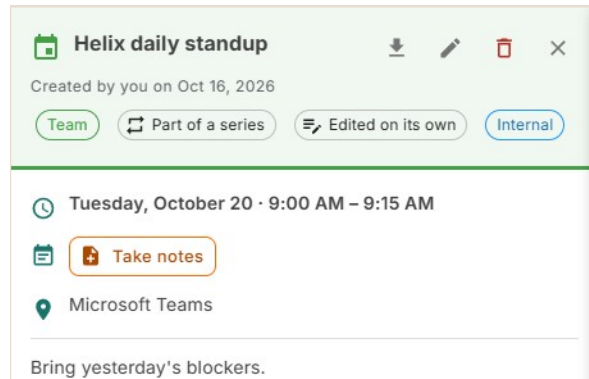
Cancel This event This & following All events

*Save recurring event*

- **This event:** only this one.
- **This & following:** this one and every one after it.
- **All events:** the whole series. A time change moves every event by the same amount.



An event you change on its own gets an **Edited on its own** chip, and later **All events** changes leave it alone. It's had its moment. Let it be.

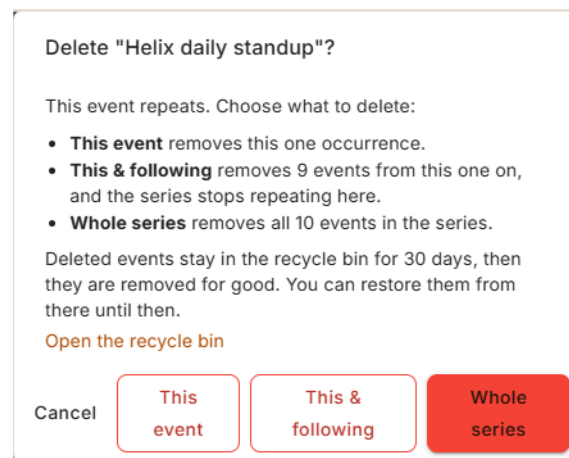


*An occurrence edited on its own*

The repeat pattern itself (daily, weekly, which days) is changed from the series' first event.

## Deleting an event

The red bin asks first. For a repeating event it tells you exactly what each choice removes:



*Deleting from a series*

Deleted events go to your **recycle bin**. The dialog says how long they stay there (30 days, unless your workspace has changed it) and links to it. The message after a delete also has **Undo** for ten seconds, which brings back exactly what went.



## Events and tasks

---

An event can be linked to one task: the working session, the review, the call where the thing gets decided.

- Link it from the event (**Task → Link a task**, search, pick), or from the task's own page under **Calendar events**.
- The event panel names the task and opens it. The task lists its events.
- In a repeating series, the link belongs to the one event you linked.
- **Log this time** (Pro) adds the event's length to the task's logged time, on the day of the event, and so to the **Time** page. Press it again after changing the event and it updates the same entry rather than adding a second one. All-day events have no length to log.

## Tasks and to-dos on the calendar

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**Due tasks** sit on their due day. Click one for its quick view, where you can change it without leaving the calendar. Drag one to another day and its due date moves with it.

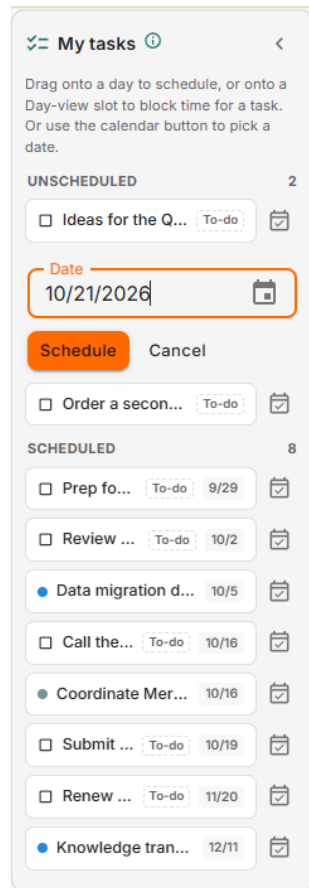
**Your to-dos** show as dashed chips, and they're private: *To-do: Call the bank about the new business card, due Oct 16. Private to you. Opens My To-Do.* Click one to go to **My To-Do**. Drag one to another day to change its due date. Nobody else sees them, they're left off when you print, and they never go in an export.

**Bills and subscriptions** show their amount. Click one to open the record in Resources. They can't be dragged. The bill's due date isn't the calendar's to change. (If only.)

**Logged time** shows the hours and the task. Click it for the task's quick view.



## My tasks



*The My tasks panel,  
scheduling a to-do*

The panel on the left holds the open tasks assigned to you and your to-dos, split into **Unscheduled** (no date yet) and **Scheduled** (with the date). To-dos carry a **To-do** tag.

- **Drag** an item onto a day to give it that date. For a to-do, only the date changes.
- **No mouse?** Click the calendar button beside an item, type or pick a date, and click **Schedule**.
- Every schedule offers **Undo**.
- Click an item to open it.
- The **i** beside *My tasks* says what the panel holds. The arrow folds it into a narrow strip for more room, and the strip's arrow brings it back. If you have nothing to schedule, it starts folded.



## Planning your day

In **Day** view, drag a task from **My tasks** onto a time in the planner (the right half). That's a **time block**: the task's name and its time, held for you.

- Drag the block to move it. Drag its bottom edge to make it longer or shorter.
- Click a block, or press **Enter** on it, to open its task.
- Remove it with its **×**, or select it and press **Delete**. **Undo** brings it back.
- To-dos can't block time. Drop one on the all-day row to give it a date instead.

A time block is a promise to yourself. Nexus can hold the time. Keeping it is on you.

## Printing and exporting

- **Print** prints the view on screen. The My tasks panel and your to-dos stay off the page.
- **Export** downloads every event you can see, past and future, as one calendar file (.ics) that Outlook, Google Calendar or Apple Calendar can open. That's every event, not just this week's. The export icon on an event's panel does the same for that one event.

## Keeping Outlook in step

Nexus can sync with your own Microsoft calendar, Microsoft 365 or a personal outlook.com account alike. You don't need to sign in to Nexus with Microsoft. The connection is **personal**: it's your calendar, and connecting it changes nothing for anyone else.

The **Outlook Calendar (Microsoft)** card is under **Admin → Integrations**. Click **Connect Microsoft calendar** and sign in to Microsoft. Once connected you choose:

- **Events created in Outlook go to:** a workspace, where they arrive visible only to you, or **Don't import**, which only sends your Nexus calendar out.
- **Send meeting invitations from Outlook:** when on, meetings synced from Nexus email their attendees through Outlook, including the attendees of future meetings that already exist. When off, events sync without attendees and nobody gets an email.

**Disconnect** stops the sync. Everything already in Outlook stays as it is.

### NOTE

For now the Integrations page is open only to workspace owners and administrators.



## When the calendar is empty, or won't load

---

- *Nothing scheduled this week.* There's nothing in range. If a layer is switched off, it names which, so you know what you're not seeing.
- *The calendar didn't load.* Something went wrong reading it, which isn't the same as a clear week. Click **Try again**.

## Keyboard

---

- **Tab** reaches every button, item and chip. **Enter** or **Space** opens or presses it.
- **Esc** closes a panel, the event editor (when you're not typing in a field), a *+N more* list or the schedule box.
- In **Link a task**, the **arrow keys** move through results and **Enter** picks one.
- On a time block, **Enter** opens the task and **Delete** removes the block.

## Common questions

---

### Can I drag an event to a new time?

No. Tasks, to-dos and time blocks drag. Events don't. Open the event and **edit** it.

### Why can't my colleague see my meeting?

Events are seen by the person who made them, their attendees, and anyone they're shared with. Add your colleague as an attendee, or share it from the panel.

### Why don't I see "Log this time"?

The event needs a linked task and a start and end time (not all-day). It's a Pro feature, so on other plans the button carries a Pro tag.

### I deleted a whole series by mistake.

Click **Undo** in the message straight away. Missed it? It's in your recycle bin.



## Why does Month view say "+2 more" when there's room?

| Each day shows a fixed number of items so the rows line up. The rest are one click away.

## My calendar's in the wrong time zone.

| Click the time zone line under the title and pick yours.





SECTION 06

# Time

---

*Where did my week go?*



## SECTION 06

# Time

In Nexus, time lives on the task it was spent on. Each entry says who worked, on which day, for how long, and whether the hours can be billed. The **Time** page adds those entries up by week: your own hours, your team's, and the hours spent on work you own.

There's no timesheet to submit and nothing to approve. An entry counts the moment it's saved. If an hour looks wrong, talk to the person who logged it. No forms in triplicate. We checked.

Open the page from **Time** in the left menu. Everyone can log time and see their own hours. **My team** and **My work** are part of the Enterprise plan.

## IN THIS GUIDE

- |                                        |                                          |
|----------------------------------------|------------------------------------------|
| <b>01</b> Three questions Time answers | <b>05</b> The Time page                  |
| <b>02</b> The lay of the land          | <b>06</b> If your account can't log time |
| <b>03</b> Logging time                 | <b>07</b> Keyboard                       |
| <b>04</b> A task's time log            | <b>08</b> Common questions               |

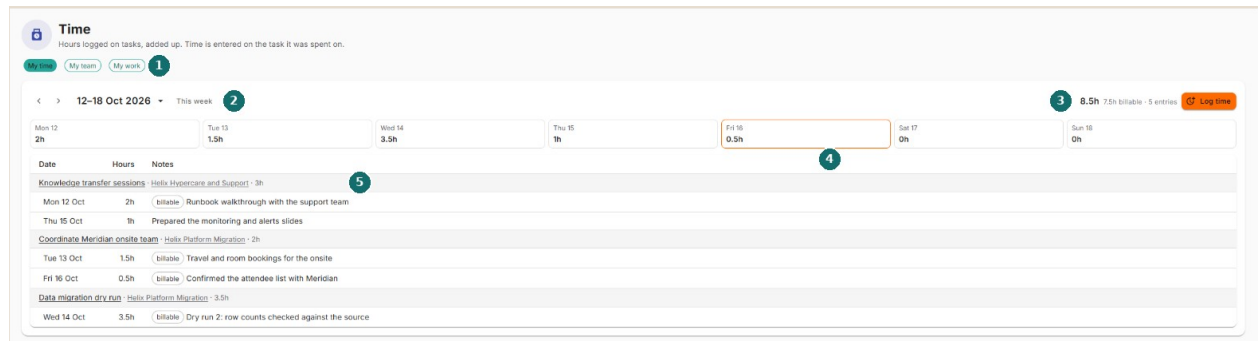
## Three questions Time answers

### QUICK START

- 1 Where did my week go? My time** shows every hour you logged, day by day and task by task.
- 2 What has my team been working on? My team** shows one direct report's week.
- 3 What has this project cost us in hours? My work** shows every hour logged on a project, program or portfolio you own.



# The lay of the land



*The Time page, with the main areas numbered*

- 1 The views.** My time, My team and My work. You only see the ones that apply to you.
- 2 The week.** Arrows, the week's name, and **This week**.
- 3 The total**, how much of it is billable, and **Log time**.
- 4 One box per day**, with that day's total. Today has a colored border.
- 5 The entries**, grouped by task.

## Logging time

You can log time from three places:

- The task's page:** the **Time log** panel, under *Cost and effort*. Click the clock icon at its top right.
- The task's quick view:** the **Time logged** line shows the total, with **Log time** beside it.
- The Time page:** **Log time** on *My time*. It asks which task, from the tasks assigned to you. Type to search the list.



They all open the same form:

The screenshot shows a 'Log time' form with the following elements:

- Task\***: A dropdown menu with 'Knowledge transfer sessions' selected.
- Date**: A date input field showing '10/12/2026' with a calendar icon.
- Hours**: A numeric input field showing '2' with up and down arrows.
- Hours chips**: A row of buttons labeled '0.5h', '1h', '2h' (which is highlighted in orange), '4h', and '8h'.
- Notes**: A text area containing 'Runbook walkthrough with the support team'.
- Billable**: A toggle switch that is currently turned on (green).
- Buttons**: 'Cancel' and 'Log' (with a checkmark icon) buttons at the bottom right.

The Log time form

- **Task.** Only on the Time page. On a task, it's that task.
- **Date.** Starts at today, or at the date you last logged, so a run of days goes quickly.
  - A date in the future is allowed, with a reminder: *"That date is in the future. It is allowed, but double-check it."*
  - A date more than 60 days back is allowed, with a reminder: *"That date is 90 days ago. It is allowed, but double-check the date."*
  - A date before 1 Jan 2000 is refused. If you're logging time from 1999, we have questions.
- **Hours.** More than 0, at most 24, in quarter hours or finer. The chips (**0.5h, 1h, 2h, 4h, 8h**) fill it in.
- **Notes** (optional). What the time was spent on, up to 2,000 characters.
- **Billable.** Whether the hours can be billed to a client.
- **On behalf of** (task page only). Log hours for someone else: a teammate, or an outside contact such as a contractor. Leave it empty to log your own. It appears if you own the work, stand in for its owner, or manage the person directly.

Click **Log**, or press **Enter**. To log your own time you need at least comment access to the task.

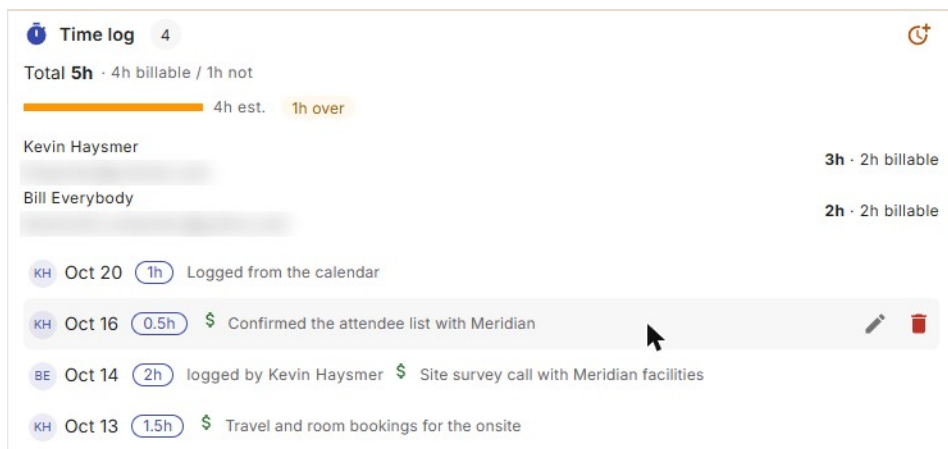
#### NOTE

**A day holds 24 hours.** Nexus adds up everything one person logged on one day, across every task, and refuses an entry that would pass 24: *"That would make 25h logged for you on Wed 14 Oct 2026. A day has 24 hours. 4h is left on that day."* Even consultants don't get 25.

**TIP**

You can also log time from the calendar. An event linked to a task has **Log this time**, which records the event's length on that task. See the Calendar guide.

## A task's time log



A task's Time log

The **Time log** panel on a task shows:

- **The total**, and how much of it is billable.
- **A bar against the estimate**, when the task has estimated hours, with *1h over* (or however much) once the total passes it.
- **Time by person**, when more than one person has logged time.
- **The entries**, newest first: the date, the hours, a \$ when billable, and the note. A long note is cut short. Hover over it, or Tab onto it, to read it all. The first 20 show, and **Show all** lists the rest.
- **logged by** and a name, on an entry someone entered for another person.

Hours by person show to that person, their direct manager and the owner of the work. Everyone who can see the task sees the total. If some names are held back from you, the panel says so.

### Changing an entry

Hover over an entry you logged, or one you entered for someone else, and **edit** and **delete** appear.



- **Edit** opens the same form. If someone changed the entry after you opened it, your save is refused and nothing is overwritten: *"This entry changed somewhere else while you were editing, so your changes were not saved."* **Reload the entry** shows the current values.
- **Delete** removes it at once: *"Entry deleted. The total dropped by 0.5h."* Click **Undo** in that message to bring it back, note and all.

## The Time page

### My time

Your own hours for the week. The day boxes across the top add up each day. Below them, entries are grouped by task, with the task's **project** (or *No project*) and its hours for the week. Click a task or a project to open it.

Each line shows the **date**, the **hours** and the **notes**, with *billable* when it is, and *logged by* and a name when someone else entered it.

Log time for a date in a different week and the page jumps there and tells you: *"Showing the week of Wed 7 Oct, where that time was logged."*

### My team

| Date       | Hours | Notes                                                                      |
|------------|-------|----------------------------------------------------------------------------|
| Wed 14 Oct | 2h    | billable logged by Kevin Haysmer Site survey call with Meridian facilities |

*My team, showing a direct report's week*

One person's week at a time. Pick them in **Person**, which lists the people who report to you in the org chart and searches as you type. This view appears only if someone reports to you.

### My work

| Person         | Date       | Hours | Notes                                                                      |
|----------------|------------|-------|----------------------------------------------------------------------------|
| Kevin Haysmer  | Tue 13 Oct | 1.5h  | billable Travel and room bookings for the onsite                           |
| Bill Everybody | Wed 14 Oct | 2h    | billable logged by Kevin Haysmer Site survey call with Meridian facilities |
| Kevin Haysmer  | Fri 16 Oct | 0.5h  | billable Confirmed the attendee list with Meridian                         |
| Kevin Haysmer  | Wed 14 Oct | 3.5h  | billable Dry run 2: row counts checked against the source                  |

*My work, showing every hour on a project*



Every hour logged on something you own. Pick it in **Project, program or portfolio**, and each line names the **person** who worked it. A program includes its projects, and a portfolio includes its programs and projects. Finished ones come last, marked (*finished*). This view appears only if you own something, or the owner has made you their stand-in.

## Who sees whose hours

Being an administrator doesn't show you anyone else's time. You see a person's hours because you manage them, and a project's hours because you own it. Rank alone gets you nothing here.

A task or project you can't open shows as plain text, marked (*not shared with you*). Its hours still count, because the hours happened whether or not you can see the task.

## Moving between weeks

Weeks run Monday to Sunday, in your own time zone.

- The **arrows** go back or forward a week.
- The **week's name** (12–18 Oct 2026) opens a calendar. Pick any day to jump to its week.
- **This week** brings you back.

# If your account can't log time

Every member needs a **person record** in the workspace to log time. Nexus makes one when you join. If yours is missing, Nexus says so: *"Time can't be logged yet because your account has no person record in this workspace. It is repaired automatically within a few hours, or a workspace administrator can repair it now: Admin, Members, Repair person records."*

### NOTE

**For administrators:** Admin → Members → Repair person records finds members without a person record and creates one.

# Keyboard

- **Tab** reaches every button, link, list and note. **Enter** presses or opens it.
- In the **Log time** form, **Enter** logs the entry.
- On a note in a time log, focus shows the full text.



- In the week calendar, **Esc** closes it and puts you back on the week's name.

## Common questions

---

### Where do I submit my timesheet?

Nowhere. Every entry counts the moment it's saved. Enjoy the free Friday afternoon.

### Why can't I edit an entry on a task?

You can change entries you logged, and entries you logged for someone else. Anything else belongs to the person who logged it.

### Why is My team (or My work) missing?

My team needs someone reporting to you in the org chart. My work needs a project, program or portfolio you own. Both need the Enterprise plan.

### Why don't I see a task in the Log time list?

The list on the Time page holds the open tasks assigned to you. For anything else, open the task and log time there.

### The total on a task is higher than the hours I can see.

Some entries belong to people whose hours you aren't shown. The total still counts them.

### What happens to hours on a deleted task?

They leave every total. Restore the task and they come back.





SECTION 07

# Notes

---

*Meeting notes, decisions, plans and half-finished thoughts.*



## SECTION 07

# Notes

Notes is where meeting notes, decisions, plans and half-finished thoughts live. Every page is a Word document: it looks the same in Nexus as it does in Word, it exports as a real .docx, and a Word file you import becomes a page exactly as it is. No "this formatting may not be supported." It's Word.

Pages sit in **sections**, and sections in **notebooks**. You have notebooks of your own, and every project, program, portfolio and contract you can see has one too.

Open it from **Notes** in the left menu.

---

## IN THIS GUIDE

- |                                     |                                         |
|-------------------------------------|-----------------------------------------|
| <b>01</b> Three things Notes is for | <b>10</b> Quick note                    |
| <b>02</b> The lay of the land       | <b>11</b> Searching                     |
| <b>03</b> Notebooks                 | <b>12</b> Pages Nexus writes for you    |
| <b>04</b> Sections                  | <b>13</b> Who can see and change a page |
| <b>05</b> Pages                     | <b>14</b> Deleting and bringing back    |
| <b>06</b> Writing a page            | <b>15</b> Files                         |
| <b>07</b> Mentions and links        | <b>16</b> Keyboard                      |
| <b>08</b> Meeting notes             | <b>17</b> Common questions              |
| <b>09</b> Templates                 |                                         |

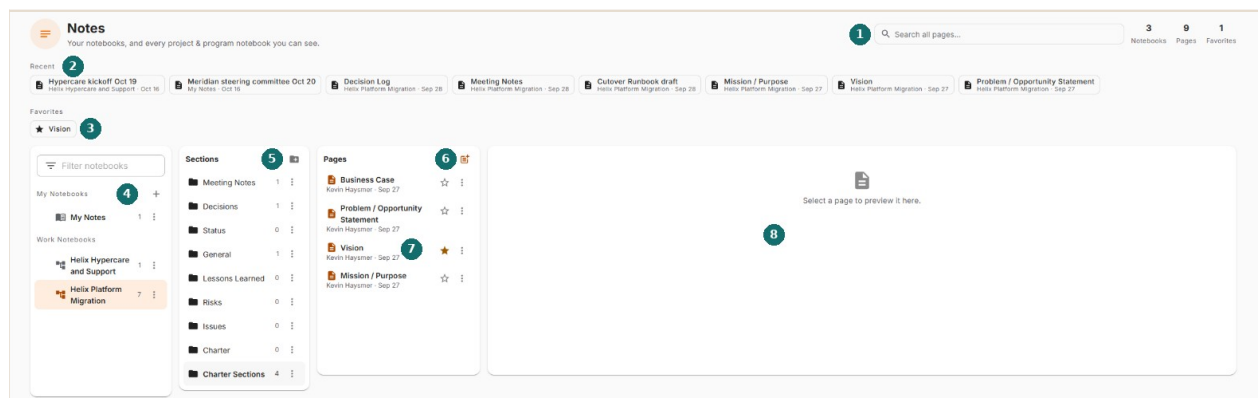


# Three things Notes is for

## QUICK START

- 1 Writing it down.** Meeting notes, decisions, a plan, a draft. **Alt+N** catches a thought from anywhere in Nexus before it escapes.
- 2 Tying it to the work.** Type @ in a page to mention a project, task, person or event, and the page is linked to it. The record lists the page under its **Notes**.
- 3 Turning talk into tasks.** The checkbox lines in a meeting page become real tasks, with owners and due dates, in one click.

# The lay of the land



Notes, with the main areas numbered

- 1 Search all pages,** and counts of your notebooks, pages and favorites.
- 2 Recent.** The pages edited most recently, each with its notebook and date.
- 3 Favorites.** Pages you've starred.
- 4 Notebooks. My Notebooks** are yours. **Work Notebooks** belong to projects, programs, portfolios and contracts.
- 5 Sections** of the open notebook. The folder icon adds one.
- 6 Pages** of the open section. The page icon makes a new one.



7 The **star** adds a page to Favorites, and **:** holds everything else.

8 The **page itself**, once you click one.

Click a page and it takes the whole screen. The address in your browser changes to that page, so **Back**, **Refresh** and bookmarks all bring you back to it. The arrow beside the title (**Back to pages**) brings the columns back.

Every row opens with a click, or with **Enter** or **Space** when it has the keyboard focus.

## Notebooks

---

- **My Notebooks.** The **+** creates one: a name and, if you like, a description. A new notebook starts with a section called **General**, so your first page is one click away. **My Notes** is your default notebook. Nexus files things there when it has nowhere better to put them.
- **Work Notebooks.** Each is named after its project, program, portfolio or contract, and you see it when you can see that record. A project's notebook sits under its program's.

The open notebook shows its description under its name. Any notebook shows it when you hover.

**Filter notebooks** narrows both groups as you type, sub-notebooks included. If you can see more than 15 Work Notebooks, the group folds down to the ones you're working in. **Show all** unfolds it.

A notebook's **:** offers:

- **Add sub-notebook.** Notebooks nest up to seven levels deep. If you need eight, we'd gently suggest a different filing system.
- **Move up** and **Move down.** You can also drag a notebook onto another in the same group.
- **Export to Word.** The whole notebook as one document.
- **Rename** and **Move to bin.** Your own notebooks only. A Work Notebook follows its record.

## Sections

---

The folder icon adds a section. Two sections in one notebook can't share a name, whatever the capitals. Nexus says so under the name field.

A section's **:** offers **Rename**, **Move up**, **Move down**, **Export to Word**, **Import Word document...** and **Move to bin**. You can also drag sections into a new order.



# Pages

The page icon at the top of the page list offers two ways to make a page:

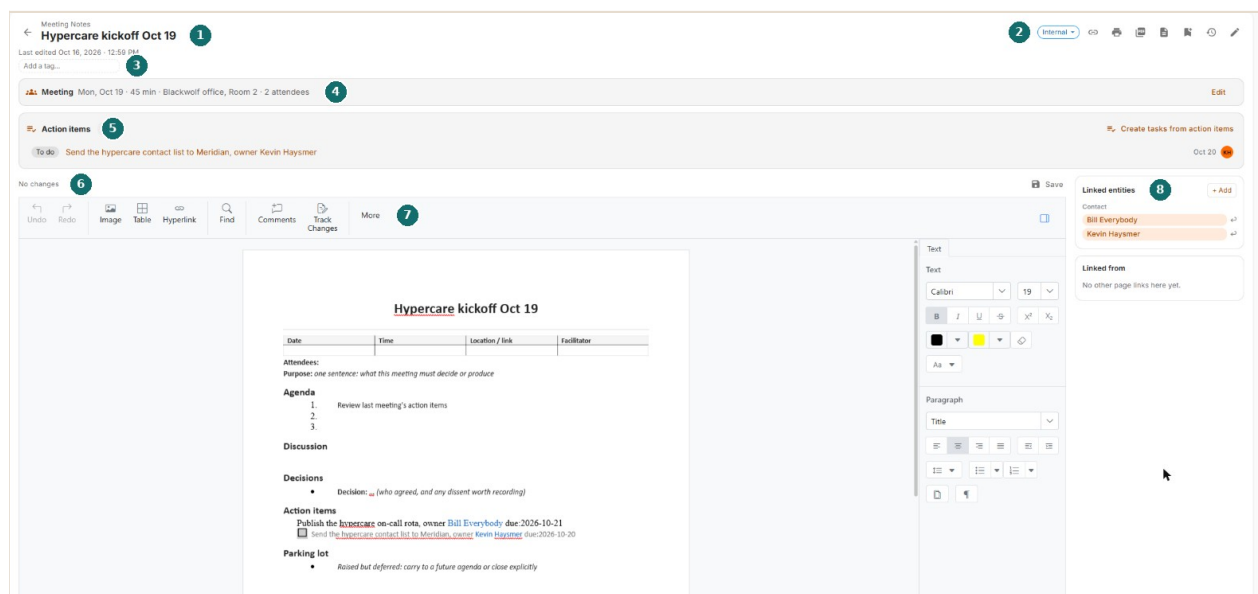
- **New page.** Opens the template gallery (see *Templates*). **Blank page** asks for a name first. Press **Enter** to keep the suggested one.
- **Import a Word document...** The file becomes the page, exactly as it is. Your copy is untouched. Only real Word files are accepted.

Each row shows the title, who edited it last and when, and any tags. The **:** offers **Rename**, **Sensitivity...**, **Copy link**, **Move up**, **Move down**, **Move to...** (another section or notebook), **Export to Word**, **Save as template** and **Move to bin**. You can also drag pages into a new order, or onto another section.

**Tags.** Type them under a page's title (**Add a tag...**). A section's tags appear above its page list. Click one to show only those pages.

**Open pages.** Every page you open joins a strip above the page, so you can hop between a few without going back to the list. The **X** closes one. The strip appears once you have two pages open.

# Writing a page



An open page, with the main areas numbered

- 1 **The title**, with its section above it and **Last edited** below.



- 2 **The page's tools:** sensitivity, copy link, print, PDF, Word, save as template, version history and rename.
- 3 **Tags.**
- 4 **Meeting details,** on a meeting page.
- 5 **Action items** that have become tasks.
- 6 **Saved** (with the time) or **No changes**, and **Save**.
- 7 **The toolbar.**
- 8 **Linked entities** and **Linked from**.

The page is a Word document, edited in place. The toolbar keeps to what notes need: **Undo**, **Redo**, **Image**, **Table**, **Hyperlink**, **Find**, **Comments** and **Track Changes**. **More** adds the page layout tools. The panel button at the right of the toolbar opens the formatting pane (fonts, paragraphs, styles), and Nexus remembers whether you like it open.

Pasting from Word keeps the formatting. Spelling is underlined as you type.

**Saving is automatic.** Two seconds after you stop typing, the page saves and the line above the toolbar says *Saved* with the time. **Save**, or **Ctrl+S**, saves right away. Leave with unsaved changes and Nexus saves first. You'd have to try quite hard to lose work here.

If someone else saved the page while you were typing, Nexus stops, says so, and keeps your text on screen. **Reload this page** brings in their version. Copy out anything of yours you want to keep first.

## The page's tools

- **Sensitivity** (Public, Internal, Confidential, Restricted). It decides whether the page can be used as AI context. Click it to change it, or use **Sensitivity...** in the page's **⋮**.
- **Copy link.** A link straight to this page.
- **Print.** Prints the page exactly as the PDF lays it out.
- **Export as PDF** and **Export as Word**.
- **Save as template.** See *Templates*.
- **Version history.** See below.
- **Rename** (the pencil). Renaming a page also changes the title at the top of its document.



## Version history

Version history

 Oct 16, 2026 · 12:56 PM  
Kevin Haysmer

Text preview. Restoring makes this the page's current document. The state you have now is checkpointed first, so a restore can itself be undone.



Meeting Notes

Date  
Time  
Location / link  
Facilitator

Attendees:  
Purpose: one sentence: what this meeting must decide or produce  
Agenda  
1. Review last meeting's action items  
2.  
3.  
Discussion

Decisions  
\* Decision: ... (who agreed, and any dissent worth recording)  
Action items  
Action, owner, due date

Parking lot  
\* Raised but deferred: carry to a future agenda or close explicitly

Close

Restore this version

Version history

The clock icon opens the page's **version history**: checkpoints of how the page was, newest first. Pick one to read it, download it as a Word file, or **Restore this version**. Restoring checkpoints the current page first, so a restore can be undone too.

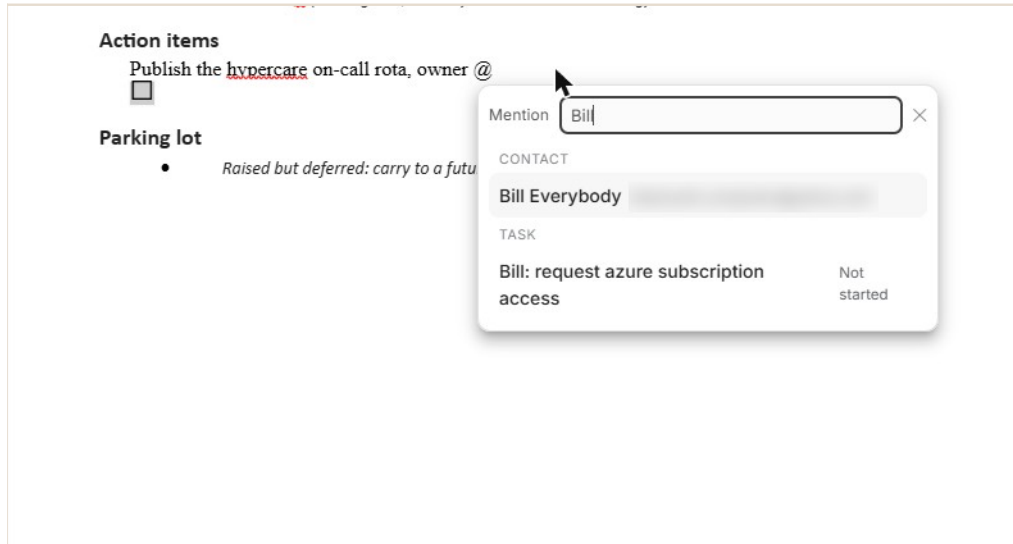
Nexus takes a checkpoint when you come back to a page after a break, when someone else edits it, and whenever a save would replace most of the page's text. It keeps the last 50.



# Mentions and links

## Mentioning something

Type @ anywhere in a page. A search opens at the cursor. Type a few letters of a project, task, person, event, contract, client account, note, or anything else you can see, then press **Enter** or click a result.



*Mentioning someone with @*

The @ becomes the record's name in blue, and the page is linked to it when it saves. Keep typing after it as usual.

- To unlink, delete the name from the page. The link goes on the next save.
- A mention keeps the name as it was when you wrote it. The links panel shows the current one.
- **Esc** closes the search and leaves the @ as typed. Sometimes an @ is just an @.

## Linked entities and Linked from

The panel beside the page lists everything the page links to, grouped by type. A link made by a mention carries the ↩ marker, and you remove it by editing the page. + **Add** links something without mentioning it, and its × removes it again.

**Linked from** lists the other pages that link to this one.

Something you can't open shows as *(no access)*, and something deleted as *(removed)*.



## Notes on records

Tasks, projects, programs, portfolios, goals, milestones, events, contracts, client accounts and resources all have a **Notes** panel listing the pages linked to them.

- **Link a note** attaches a page that already exists. You need to be able to edit that page.
- **+ New linked note** writes a new one. Nexus tells you which notebook and section it will go in before it creates it, and **Open it** takes you there. It goes in the record's own notebook if you can edit it, and in **My Notes** otherwise.
- **×** unlinks a note that was linked by hand, from either end. A note linked by a mention is unlinked by editing the note.

## Meeting notes

On any page, **Make this a meeting page** adds a meeting header: **Date**, **Duration (min)**, **Location** and **Attendees**. **Me** adds you. Attendees can be people in your workspace, contacts, or any email address, each shown with their email. Once it's filled in, the header folds to one line (*Mon, Oct 19 · 45 min · Blackwolf office, Room 2 · 2 attendees*) and **Edit** opens it again.

**Link a calendar event** ties the page to an event instead. The date, time, place and attendees then come from the calendar, and the header links back to the event. From the calendar, an event's panel offers **Take notes**, which makes a meeting page for it. **Unlink the calendar event** (in the header's **⋮**) keeps the details the page last showed.

## Action items

The checkbox lines on a page are its action items. The Meeting Notes template starts you off with a couple.

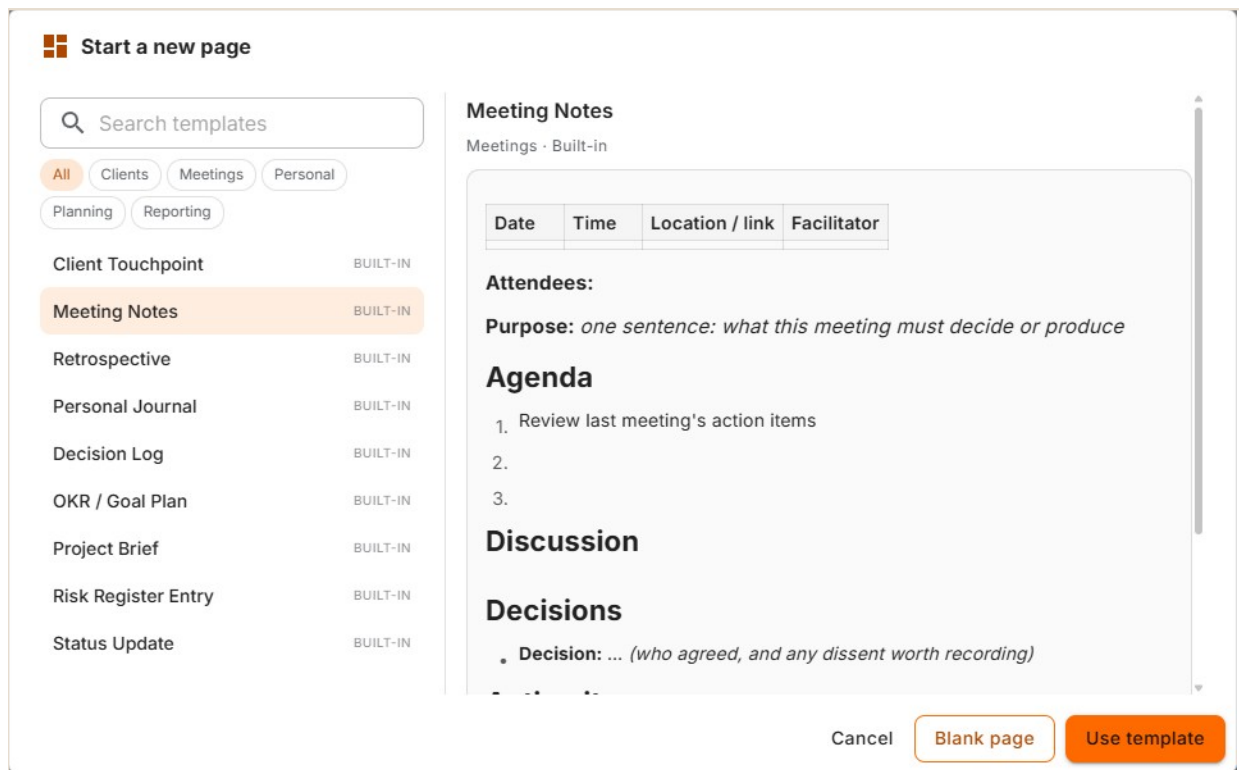
- **Create tasks from action items** turns each line into a task: in the project, when the notebook belongs to one, or otherwise as a task of your own. Press it again and it updates those tasks rather than adding new ones. Delete a line and its task is left alone.
- Write a date as **due:2026-10-21** (or just **2026-10-21**) on the line and it becomes the task's due date.
- **@mention** a person on the line and the first one becomes the task's owner.
- When a page has lines that aren't tasks yet, it says how many, with **Create tasks**.

The tasks then show in the **Action items** strip with their status, due date and owner. Click one to open it.

Meetings produce a lot of "someone should." This turns it into "Bill will, by Wednesday."



# Templates



The template gallery

**New page** opens the gallery. Search, or browse by category (**Clients**, **Meetings**, **Personal**, **Planning**, **Reporting**), click a template to preview it, then **Use template**. **Blank page** skips it.

The built-in templates: **Client Touchpoint**, **Meeting Notes**, **Retrospective**, **Personal Journal**, **Decision Log**, **OKR / Goal Plan**, **Project Brief**, **Risk Register Entry** and **Status Update**.

## TIP

A page made from a template takes the template's name. Rename it with the pencil, or you'll end up with a notebook full of pages called *Meeting Notes*.

**Save as template** (in the page's tools, or its **:**) adds a page to your templates, with a name and a category. It keeps the page's content and whether it's a meeting page.



## Quick note

**Quick note**

Title  
Ideas for the Meridian QBR

First line (optional)  
Lead with the cutover results, then the hypercare numbers.

Lands in My Notes → Inbox. File it later.

Cancel Create

Quick note

Press **Alt+N** anywhere in Nexus outside a page you're editing. **Quick note** opens with a title ready (*Quick note Oct 16*, until you type over it) and an optional first line. **Create** files it in **My Notes** → **Inbox** and opens it. File it properly later. Or don't. We won't tell.

## Searching

Searching every page

**Search all pages...** at the top of Notes searches the titles and text of every page you can see, as you type. Pages whose title matches come first, then the most recently edited. Each result shows its notebook and section, who last edited it and when, and the matching text. The arrow keys move through results and **Enter** opens one.

A project's (or other record's) **Notes** tab has **Search this notebook...** for that notebook alone.



## Pages Nexus writes for you

---

Some pages are generated from a record: a project's or portfolio's **published charter versions**, and the pages the **risk, issue and lessons learned registers** keep. They're marked **generated**, and a note above the page says why you can't edit it, where it's changed instead, and links there. You can still read, print, export and link them.

## Who can see and change a page

---

A page follows its notebook. Whoever can see a project sees its notebook. Your own notebooks are yours until you share them. A page you can only read opens with **viewing** above it, and the editing controls stay out of the way.

## Deleting and bringing back

---

**Move to bin** works the same for pages, sections and notebooks. The message afterwards says what went with it (*"Planning" with its 3 pages moved to the recycle bin.*) and has **Undo**, which brings back the pages, their favorites and their links.

Deleted items stay in the **recycle bin** for 30 days, unless your workspace has changed that. A section restored beside another of the same name comes back as *Name (2)*.

## Files

---

The **Files** panel under a page holds attachments up to 25 MB: documents, images, spreadsheets and zip files. Files are exactly as private as the page they're attached to. **Attach file** adds one, and each file shows its size, who added it and when.

## Keyboard

---

- **Alt+N** opens Quick note.
- **Ctrl+S** saves the page now.
- **@** in a page starts a mention. **Enter** picks a result, **Esc** cancels.
- **Tab** reaches every row, button and menu. **Enter** or **Space** opens or presses it.



- In search, the **arrow keys** move through results and **Enter** opens one.

## Common questions

---

### Why is every page a Word document?

So what you write in Nexus is exactly what you'd send, print or open in Word, with nothing lost on the way.

### Where did my quick note go?

**My Notes → Inbox.**

### Why can't I rename or delete a Work Notebook?

It belongs to its project, program, portfolio or contract, and follows it.

### I can't edit a page.

You can view it but not change it. The page says **viewing** above it. Ask whoever owns the notebook.

### A mention shows an old name.

Mentions keep the name as it was when written. The links panel shows the current one.

### Can I get an old version back?

Yes. Use **Version history**, pick a checkpoint, then **Restore this version**.





SECTION 08

# Smart Lists

---

*A table you design yourself.*



## SECTION 08

# Smart Lists

A Smart List is a table you design yourself. You pick the columns, Nexus keeps the rows. Server inventories, vendor contacts, a hardware refresh plan, the movies you keep meaning to watch. If you'd otherwise keep it in a spreadsheet that only you can find, it probably belongs here.

When a list grows into real operational data, you can convert it into a **resource section**, where each row becomes a record with its own page. A list with a count column can become an inventory the same way.

Open it from **Smart Lists** in the left menu.

---

## IN THIS GUIDE

- |                                            |                                            |
|--------------------------------------------|--------------------------------------------|
| <b>01</b> Three things Smart Lists are for | <b>08</b> Sharing a list                   |
| <b>02</b> The Smart Lists page             | <b>09</b> List settings                    |
| <b>03</b> Making a list                    | <b>10</b> Converting to a resource section |
| <b>04</b> Designing the columns            | <b>11</b> Turning a list into an inventory |
| <b>05</b> Working in a list                | <b>12</b> Deleting and bringing back       |
| <b>06</b> Importing rows                   | <b>13</b> Keyboard                         |
| <b>07</b> Exporting                        | <b>14</b> Common questions                 |



## Three things Smart Lists are for

### QUICK START

- 1 **Keeping track of anything.** Make a list, design its columns, start typing rows.
- 2 **Sharing it.** Share the whole list with the people who need it, at the access level they need.
- 3 **Growing it up.** When a list matters enough to need detail pages and record-by-record sharing, convert it into a resource section. Give it a stock count on the way and it becomes an inventory.

## The Smart Lists page



*The Smart Lists page*

Each list you can see has a tile: its icon and color, its name and description, how many rows it holds and when it was last updated. A star means you've starred it. Click a tile, or its name, to open the list.

The **⋮** on a tile offers **List settings...** and **Delete list**, if you're allowed to change the list.

**Recently deleted**, at the bottom, holds the lists you've deleted. See *Deleting and bringing back*.

## Making a list

- 1 Click **New list**.
- 2 Give it a **Name** and, if you like, a **Description**. The description shows under the name, here and on the list itself.



- Click **Create**, or press **Enter**. The list opens with **Columns** ready for you to design.

A new list is yours alone until you share it.

## Designing the columns

*Designing the columns*

**Columns** (at the top of the list) opens the column designer. **Add column**, give it a name, and pick its type:

| TYPE             | HOLDS                                                                                 |
|------------------|---------------------------------------------------------------------------------------|
| <b>Text</b>      | A short line of text.                                                                 |
| <b>Long text</b> | Several lines. In a cell, <b>Enter</b> starts a new line and <b>Ctrl+Enter</b> saves. |
| <b>Number</b>    | A number.                                                                             |



| TYPE                      | HOLDS                                                                                                                         |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| <b>Currency</b>           | An amount. Pick a currency for the column, or leave it as plain numbers. Amounts show in that currency. Nothing is converted. |
| <b>Date</b>               | A date, picked or typed.                                                                                                      |
| <b>Checkbox</b>           | Yes or no. One click ticks it.                                                                                                |
| <b>Dropdown (options)</b> | One of a set of choices. Type the options separated by commas, like <i>Production, Staging, Test</i> .                        |
| <b>Web link</b>           | A web address. It opens in a new tab.                                                                                         |
| <b>Link to a record</b>   | A record from any resource section, built-in or converted.                                                                    |

**TIP**

**The first text column is each row's title.** It's what Nexus calls the row elsewhere, so put the name there.

Each column also has:

- **Required.** A row can't be added or saved without it.
- **Indexed.** Keeps the column sortable once a list passes 2,000 rows. A list can index only a limited number of columns of each type. Hover over the switch for the numbers.
- **↑ and ↓** to reorder, and the **bin** to remove it.

Click **Save columns** when you're done.

**Changing columns on a list that has rows.** If a change means some rows no longer fit (a column made required, say, while some rows leave it empty), the designer tells you how many and why, before saving. **Save anyway** keeps those rows exactly as they are and marks them as needing attention. Nothing is thrown away.

**Removed columns** stay at the bottom of the designer for a while, with **Put back**. Remove a column by mistake and you can have it back, values and all.

If someone else changed the columns while you were editing, nothing is saved. The designer tells you which of your new columns to add again and offers **Reload columns**.



# Working in a list

The screenshot shows a smart list titled 'Helix server inventory' with 6 rows. The interface includes a search bar, a star icon, and buttons for Columns, Import, Export, and Share. The table has columns for Server, Environment, Owner, Patched this month, Last patched, Monthly cost, and Runbook. A new row line is visible at the top of the table.

| Server         | Environment | Owner          | Patched this month                  | Last patched | Monthly cost | Runbook                                                   |
|----------------|-------------|----------------|-------------------------------------|--------------|--------------|-----------------------------------------------------------|
| HLX-TEST-01    | Test        | Bill Everybody | <input type="checkbox"/>            | Aug 30, 2026 | \$210.00     | <a href="#">wiki.blackwolf.example/runbooks/hlx-sql</a>   |
| HLX-SQL-01     | Production  | Kevin Haysmer  | <input type="checkbox"/>            | Sep 14, 2026 | \$2,400.00   | <a href="#">wiki.blackwolf.example/runbooks/hlx-sql</a>   |
| HLX-STG-APP-01 | Staging     | Bill Everybody | <input checked="" type="checkbox"/> | Oct 5, 2026  | \$480.00     | <a href="#">wiki.blackwolf.example/runbooks/hlx-app</a>   |
| HLX-APP-01     | Production  | Bill Everybody | <input checked="" type="checkbox"/> | Oct 12, 2026 | \$1,250.00   | <a href="#">wiki.blackwolf.example/runbooks/hlx-app</a>   |
| HLX-WEB-01     | Production  | Bill Everybody | <input checked="" type="checkbox"/> | Oct 13, 2026 | \$840.00     | <a href="#">wiki.blackwolf.example/runbooks/hlx-web</a>   |
| HLX-JUMP-01    | Production  | Kevin Haysmer  | <input checked="" type="checkbox"/> | Oct 14, 2026 | \$95.00      | <a href="#">wiki.blackwolf.example/runbooks/jump-host</a> |

A list, with the main areas numbered

- 1 **The name, the row count and the description.**
- 2 **The star.** Stars the list for you alone.
- 3 **Columns, Import, Export, Share** and **:** (List settings, Convert to resource section, Delete list).
- 4 **Search this list.**
- 5 **Column headers.** Click one to sort by it. Click again to reverse. The arrow shows which way.
- 6 **The new-row line.** Type in it and press **Enter** (or click **+**) to add a row.
- 7 **×** deletes a row.

## Adding rows

The new-row line sits right under the column names, so you can add a row from anywhere in a long list. Each box matches its column: a dropdown for a dropdown column, a date picker for a date, and so on. Fill in what you have and press **Enter**.

If the row can't be added (a required column is empty, say), it isn't lost. The line keeps what you typed, outlines the problem column, and says *"Not added."* with the reason. Fix it and press **Enter** again.

New rows stay pinned at the top, under *Added just now*, until you change the search, filter or sort. That way they don't vanish into the middle of a sorted list the moment you add them.

**Link to a record** columns are filled after the row exists: add the row, then click the cell and pick.



## Changing a cell

Click a cell to edit it. **Enter** saves, **Tab** saves and moves to the next cell, **Esc** leaves it as it was. Checkboxes save with one click.

If a change is refused, the cell says "Not saved." with the reason and the value that is actually saved, so you're never guessing which one stuck.

## Rows needing attention

When a column change leaves some rows short of the rules, a chip appears beside the search box: *2 rows need attention*. Click it to show only those rows. Hover over a cell to see what's wrong. Click it again to show every row.

## Deleting a row

The **×** at the end of a row deletes it straight away, with **Undo** in the message for ten seconds. Missed it? The row is also in the recycle bin.

## Searching and sorting

**Search this list...** narrows the rows as you type. The count under the name then reads *3 of 6 rows*. Sort by clicking a column's name. **Link to a record** columns can't be sorted, because the names they show live on other records.

## Big lists

A list holds up to **10,000 rows**. Rows load in blocks as you scroll, so a big list opens as fast as a small one. From 8,000 rows, the list suggests converting it to a resource section. At 10,000 it's full, and converting is how it keeps growing.

# Importing rows

**Import** reads Excel (.xlsx), CSV (.csv), tab-separated text (.tsv, .txt), a table in a Word document (.docx) or a Microsoft Works database (.wdb), up to 10 MB.

- 1 Choose file.** If a workbook or document holds more than one sheet or table, pick which one.
- 2 Map the columns.** The first row is the headers. For each, choose an existing column, **Create new column**, or **Skip this column**. The first few values show under each header, so you can see what you're mapping.



- 3 Import.** Rows go in with a progress bar and a **Stop** button. Stopping keeps the rows already added.

Afterwards Nexus lists any rows it skipped, by their row number in your file and why, and you can download them to fix and import again. **Undo import** takes back the whole import, as long as none of its rows have been edited since.

If a date column could be read day-first or month-first, Nexus asks rather than guesses. 03/04 is a date, not a coin toss.

## Exporting

**Export** downloads the list as an **Excel workbook (.xlsx)** or a **CSV file (.csv)**. It exports what you're looking at: if a search, sort or *needing attention* filter is on, the export follows it.

## Sharing a list

Sharing a list



**Share** opens the share panel. Sharing a list shares **all** of its rows. The levels:

| LEVEL          | CAN                                                              |
|----------------|------------------------------------------------------------------|
| <b>View</b>    | Read the list.                                                   |
| <b>Comment</b> | Add and import rows.                                             |
| <b>Edit</b>    | Change cells and delete rows.                                    |
| <b>Admin</b>   | Design columns, change list settings, share, convert and delete. |

Pick a person, pick a level, and check the **Preview** line, which tells you what will change before you click **Share**.

What a person can do shows in what they see. Someone with View access doesn't get a new-row line or a Columns button they can't use.

## List settings

**List settings...** (in the ) changes the list's **Name**, **Description**, **Color** and **Icon**. The color and icon show on the tile and at the top of the list.

## Converting to a resource section

When a list becomes real operational data, **Convert to resource section...** (in the ) moves it into the **Resources** hub. Any list can be converted, whatever its columns.

 Convert "Spare parts" to a resource section?

It moves out of Smart Lists and into the Resources hub. Its 5 rows become records, each with a page of its own and file attachments, and other lists can link to them.

**Sharing changes.** Today the whole list is shared at once. Afterwards each record is shared on its own: everyone who can see this list keeps access to the 5 records that exist now, but records added later are shared one by one.

 This is one-way. A section cannot turn back into a list.

☒ Track stock after converting

Not now Convert to section

*The convert dialog*



## HEADS UP

Read the dialog before you click, because two things change for good:

- **Sharing changes.** Today the whole list is shared at once. Afterwards each record is shared on its own. Everyone who can see the list keeps access to the records that exist now, but records added later are shared one by one.
- **It's one-way.** A section can't turn back into a list.

Click **Convert to section**. **Not now** leaves the list as it is. On a big list, converting can take a minute. Keep the page open until it's done. If it fails, the list is not converted and nothing in it changes.

## What you get

You land on the new section in **Resources**. The list is gone from Smart Lists, and the section takes its name: the list *Helix server inventory* becomes the section *Helix server inventory*, with a **New Helix server inventory** button.

The screenshot shows a web interface for a section named 'HLX-APP-01' under 'Resources'. The 'Details' panel on the left contains the following information:

- Server: HLX-APP-01
- Owner: Bill Everybody
- Last patched: 10/12/2026
- Runbook: https://wiki.blackwolf.example/runbooks/hlx-app

The main area shows a table with one row. The right sidebar contains the following sections:

- My groups:** Group things your way; only you see these. Filing saves immediately; it is not part of the record's Save or Cancel. [Create a personal group](#)
- Comments:** Add a comment. [Comment](#)
- Notes:** Link a note. New linked note. No notes linked yet.
- Files:** Files attached here are as private as the record. [Attach file](#). Up to 25 MB: documents, images, spreadsheets, zip.
- Shares:** Target: Bill Everybody. Level: [blue dot]. Share with: A member. Find a person... Level: View. [Share](#)
- Assignments:** No one is assigned yet. Person: [dropdown]. Role: Contributor. [Assign](#)

*A converted row, now a record*

Each row is now a record with a page of its own. Your columns become its **Details**, with the same names, types and values. Beside them, every record gets what a row never had: **Comments**, **Notes**, **Files**, its own **Shares**, **Assignments**, and **Used in**, which lists the tasks, projects and programs that link to it.



The section shows its records as **Cards**, a **List**, a **Grid** or a **Kanban** board (Kanban needs a dropdown column to sort by). Its columns are fixed at conversion. There's no column designer on a section, so get the columns right while it's still a list.

## Turning a list into an inventory

Any list with a number column can become an inventory: a stock count per record that work draws down, with reorder alerts. This is for things you keep and use up, like spare parts, consumables, loaner laptops. Tracking stock is part of the Pro plan's inventory.

### Design the list for stock

Give the list a **Number** column for the count, and any of these you want:

| COLUMN        | TYPE               | BECOMES                                                                           |
|---------------|--------------------|-----------------------------------------------------------------------------------|
| On hand       | Number             | The opening count. Required.                                                      |
| Min level     | Number             | Below this, the record shows <i>Below minimum</i> .                               |
| Max level     | Number             | Above this, it shows <i>Over maximum</i> .                                        |
| Reorder point | Number             | At or below this, it shows <i>Reorder</i> .                                       |
| Unit cost     | Currency or Number | What one costs. A record with a unit cost adds its cost to the work that uses it. |

The names are up to you. You match them up in the next step. Other columns (part name, SKU, shelf) come across as ordinary details.

### Convert with Track stock

- 1 Open the list's and pick **Convert to resource section....**
- 2 Tick **Track stock after converting**. It appears when your workspace has inventory and you can manage it.
- 3 Click **Convert to section**. You land on the section with **Track stock** open.



**Track stock**

Choose the columns that hold your stock. Each record gets a stock card with its On hand as the opening balance; from then on the card keeps the count, and work that uses a record reserves and uses it.

On hand  
On hand

Min level (optional)

Max level (optional)

Reorder point (optional)  
Reorder point

Unit cost (optional)  
Unit cost

A record with a unit cost adds its cost to the work that uses it.

5 records. Every record has a number in On hand.

Cancel
Turn on

Mapping the columns that hold stock

- 4 Pick which column is **On hand**, then any of **Min level**, **Max level**, **Reorder point** and **Unit cost**. Nexus picks the first number column as On hand, so check it. Each column can fill only one role.
- 5 Read the line at the bottom. *5 records. Every record has a number in On hand.* means every count came across. If some records have no number there, it says how many, and those start at 0.
- 6 Click **Turn on**. The message reads *Stock is tracked for 5 records.*

## What changes

Resources / Spare parts

Spare parts
5 records

Export
New Spare part

Search spare parts...

All stock
Needs reorder
Below minimum
Negative
Over maximum

| Spare part               | Part                     | SKU         | On hand | Reorder point | Unit cost | Available | Stock   |
|--------------------------|--------------------------|-------------|---------|---------------|-----------|-----------|---------|
| 24-port PoE switch       | 24-port PoE switch       | SW-POE-24   | 3       | 2             | \$389.00  | 3         |         |
| Cat6 patch cable 2m      | Cat6 patch cable 2m      | CAB-C6-2M   | 60      | 25            | \$4.25    | 60        |         |
| SFP+ 10G transceiver     | SFP+ 10G transceiver     | SFP-10G-SR  | 12      | 6             | \$42.50   | 12        |         |
| UPS battery pack         | UPS battery pack         | UPS-BAT-12V | 2       | 2             | \$188.00  | 2         | Reorder |
| USB-C laptop charger 65W | USB-C laptop charger 65W | PSU-65W-C   | 4       | 5             | \$39.00   | 4         | Reorder |

A tracked section in table view

- The section gains a stock filter (**All stock**, **Needs reorder**, **Below minimum**, **Negative**, **Over maximum**), an **Available** column and a **Stock** column with a chip such as **Reorder**.



- **Each record** gets a **Stock** card. The card now owns the count. On hand, Min, Max and Reorder point leave the Details form, so nobody types over a count by accident.

The image shows a 'Stock' card for a record. At the top, there's a title 'Stock' and a 'Reorder' button. Below the title, there are three columns: 'On hand' with a value of 4, 'Reserved' with 0, and 'Available' with 4. Underneath these, it says 'Unit cost \$39.00, stock value \$156.00'. There are two buttons: '+ Receive' and 'Adjust count'. Below this is a 'Levels' section with input fields for 'Min', 'Max', and 'Reorder point' (set to 5). There's a 'Stock contact' dropdown menu. Below that, it says 'Who hears when this item runs low. Blank: the Stock keepers, then the workspace Owner.' and 'Notices go to: the workspace Owner'. At the bottom, there's a 'Recent movements' section showing an 'Opening balance' of +4 on Oct 16, 2026 at 2:13 PM, with a 'See all' link.

A record's stock card

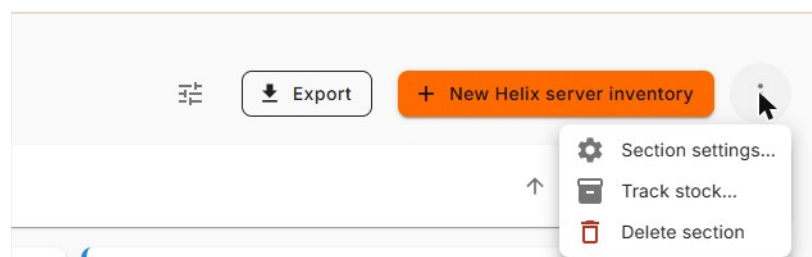
The card shows **On hand**, **Reserved** (held by open work) and **Available**, the unit cost and the stock value. From here you **Receive** stock or **Adjust count**, set the **Levels**, and choose a **Stock contact**, the person who hears when it runs low. **Recent movements** starts with one *Opening balance* per record: the number that was in the On hand cell.

Unit cost stays in Details and can still be changed there, or by receiving stock at a new price.

How stock moves from here (receiving, reserving for a task, using it up) is in the **Stock** guide under Resources.

## A section you've already converted

Converted without ticking the box? Open the section's and pick **Track stock....** It's the same dialog.



Track stock in a section's menu



If the section has no number column, **On hand** offers **Add an On hand column**, and every record starts at 0. Since a section's columns can't be redesigned, this is the only way to add one after converting.

## Turning it off

**Track stock...** on a tracked section offers **Turn off**. Nexus asks once more (*Stop tracking stock for this list? Counts are written back into the On hand column and the history is kept.*) and **Stop tracking** does it. The cells can then be edited again. Turn it on again later and Nexus records an opening balance for any difference.

# Deleting and bringing back

**Delete list** (in the **:**, or on the tile) asks first and says how many rows go with it. The list moves to **Recently deleted** at the bottom of the Smart Lists page, where it stays for 30 days.

Each entry there says who deleted it, when, how many rows it held and how many days are left. **Restore** brings it back with its rows. **Delete for good** erases it now, after asking. That one really can't be undone.

# Keyboard

- **Tab** reaches the grid once. Inside it, the **arrow keys** move between cells.
- **Enter** or **F2** edits a cell. **Enter** saves, **Tab** saves and moves on, **Esc** cancels.
- In a **Long text** cell, **Enter** starts a new line and **Ctrl+Enter** saves.
- In the new-row line, **Enter** adds the row.

# Common questions

## Who can see my list?

| Only you, until you share it.

## Why can't I add rows to a list someone shared with me?

| You have View access. Adding rows needs Comment or higher. Ask whoever shared it.



## Why won't a column sort?

It's a **Link to a record** column. Those can't be sorted. On lists over 2,000 rows, turn on **Indexed** for the columns you sort by.

## I deleted a column by accident.

Open **Columns**, find it under **Removed columns**, and click **Put back**.

## When should I convert a list?

When rows need their own pages, files or record-by-record sharing, when you want to track stock, or when you're heading for 10,000 rows. Not before. A list is quicker to work in.

## I converted a list and need another column.

A section's columns are fixed. Add every column you'll need while it's still a list. The one exception is On hand, which **Track stock...** can add.

## Can I build an inventory from scratch?

Yes, that's what a list is for. Design the columns you want (count, levels, cost, plus anything else, like SKU or shelf), add the rows, then convert with **Track stock after converting** ticked.





SECTION 09

# Goals

---

*What are you working toward?*



## SECTION 09

# Goals

Goals is where you write down what you're working toward, then watch the work get you there. A goal can be your own (pass the certification, run the 10k) or belong to a project, program, portfolio or client account (cut the cutover downtime, keep the client).

There are two kinds:

- **A goal** fills its progress bar from the tasks you link to it. Finish a task, the bar moves.
- **An objective** is a goal with **key results**: measurable outcomes like *downtime under 2 hours* or *95% of users migrated*. You check in on each one, and the objective's progress comes from them. This is the OKR way of doing it, and it's part of the Pro plan.

Open it from **Goals** in the left menu.

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## IN THIS GUIDE

- 01** Three questions Goals answers
- 02** The lay of the land
- 03** The four numbers
- 04** Finding goals
- 05** Making a goal
- 06** A goal's page

- 07** Objectives and key results
- 08** Goals elsewhere in Nexus
- 09** Who can see a goal
- 10** Deleting and bringing back
- 11** Common questions

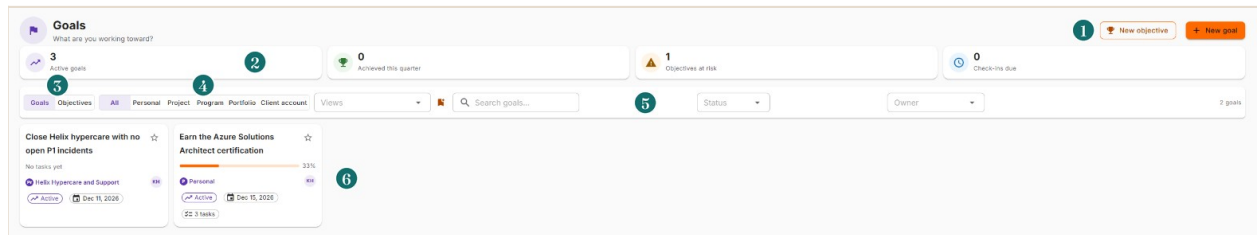


## Three questions Goals answers

### QUICK START

- 1 Am I getting there?** Every goal shows how far along it is, and why.
- 2 Which objective needs help? Objectives at risk** lists the ones whose owners have stopped feeling confident.
- 3 What should I check in on? Check-ins due** lists the key results that are waiting on an update.

## The lay of the land



*The Goals page, with the main areas numbered*

- 1 New objective and New goal.**
- 2 The four numbers.** Two of them are filters. More on those below.
- 3 Goals and Objectives.** Which kind you're looking at.
- 4 The level:** All, Personal, Project, Program, Portfolio or Client account.
- 5 Views, search, Status and Owner.**
- 6 Your goals,** one card each.



## The four numbers

| CARD                  | WHAT IT COUNTS                                                                                 |
|-----------------------|------------------------------------------------------------------------------------------------|
| Active goals          | Your active goals and objectives together                                                      |
| Achieved this quarter | Goals marked Achieved since this calendar quarter began, in your own time zone                 |
| Objectives at risk    | Active objectives whose key results' latest check-ins average below 5 out of 10 for confidence |
| Check-ins due         | Key results waiting on a check-in                                                              |

**Objectives at risk** and **Check-ins due** are buttons. Click one to show only those objectives, and click it again (or **Show all objectives**) to go back. Under Check-ins due, each card lists the key results to check in to, so each one is a click away.

### NOTE

An objective nobody has checked in on yet isn't counted as at risk. No news isn't bad news. It's just no news.

## Finding goals

| CONTROL            | WHAT IT DOES                                                                              |
|--------------------|-------------------------------------------------------------------------------------------|
| Goals / Objectives | Shows plain goals or objectives                                                           |
| All and the levels | Narrows to one level. Levels your plan doesn't include aren't offered                     |
| Views              | Saved sets of filters, the same as on Tasks. The bookmark beside it saves the current one |
| Search goals...    | Matches the name                                                                          |
| Status             | Active, Achieved or Cancelled                                                             |
| Owner              | Whose goals. You're listed as <b>Me</b>                                                   |



The count on the right says how many match. When nothing does, the page says so and offers **Clear filters**.

## Reading a card

- **The name.** Click anywhere on the card to open it. A trophy beside the name means it's an objective.
- **The star** adds it to your favorites, for you alone.
- **Progress.** A bar and a percentage, or *No tasks yet / No key results yet* when there's nothing to measure. An empty goal reads as empty, not as 0% and failing.
- **What it belongs to:** *Personal*, or the project, program, portfolio or client account, like *Helix Hypercare and Support*. The owner's initials are on the right.
- **Status**, the **target date**, and how many tasks are linked. A goal past its target date says **Overdue** in red, with the date.

## Making a goal

Click **New goal** (on this page, or on Home).

**New goal**

What are you working toward? —  
Close Helix hypercare with no open P1 inc

Why it matters (optional) —  
A clean handover is what the client remembers.

Target date (optional) —  
12/11/2026 × 📅

Level —  
Project ▼

Which project? —  
Helix Hypercare and Support × ▼

☐ Make this an Objective (OKR)

Cancel Create

*The New goal dialog*

- **What are you working toward?** The name. The only thing you have to fill in.
- **Why it matters (optional).** Future you will want to know.
- **Target date (optional).**



- **Level.** Personal, or the project, program, portfolio or client account it belongs to. Pick a level and a box appears to choose which one.
- **Make this an Objective (OKR).** Turns it into an objective with key results. **New objective** opens the same form with this already on.

Click **Create** and the goal opens.

| LEVEL                  | COMES WITH |
|------------------------|------------|
| Personal               | Every plan |
| Project                | Every plan |
| Program                | Pro        |
| Portfolio              | Enterprise |
| Client account         | Enterprise |
| Objectives (any level) | Pro        |

A level or switch your plan doesn't include is shown greyed out, with the plan that adds it and **See plans**.

A program's or portfolio's own page has a **Goals** card with a **+**, and a client account's plan has **Strategic Goals** with **New goal**. Goals made there are already set to that level and that record.



# A goal's page

The screenshot shows a goal page for "Earn the Azure Solutions Architect certification". At the top, it's labeled as a "Personal goal" and "Active". A progress bar indicates "1 of 3 tasks complete" at 33%. The "Basics" section has input fields for "Name", "Why it matters", and "Target date". The "Linked tasks" section shows a list of tasks with checkboxes. The right sidebar includes sections for "Assignees", "Comments", "Notes", and "Files".

A goal's page

**At the top:** the back arrow, the name, the **status**, the **star**, **Save** and the **:** menu. Under the name: the level, what it belongs to (a link), and *Overdue by 3 days* when it is. Under that: the progress bar.

**Basics** holds the **Name**, **Why it matters** and **Target date**. Change them and click **Save**. **Discard changes** puts them back. Leave with unsaved changes and Nexus asks first.

When AI is on for your workspace, Basics also has **AI access**: whether AI features may read this goal. It doesn't change who can see the goal.

If someone else saved the goal while you were editing, Save stops and says so, with **Reload**. Nothing gets overwritten.

## Status

Click the status to change it: **Active**, **Achieved** or **Cancelled**.

Mark one Achieved and Nexus says "Achieved: that's a win worth marking." It is. Take the moment.

## Linked tasks and progress

A goal's progress comes from the tasks linked to it.

- **Link a task** (the link icon) searches tasks you can see. **Quick-create** makes a new task already linked.



- The bar shows the share of linked tasks completed: *1 of 3 tasks complete*.
- **Cancelled tasks don't count**, for or against.
- The switch at the top of the panel **weights progress by estimated hours**, so a 20-hour task counts for more than a 1-hour one. A task with no estimate counts as one hour.
- Tick a task's circle to complete it, or click its name to open it. The broken-link icon unlinks it.

A task belongs to one goal at a time. If a task you pick is already linked somewhere else, it says **Move**, and linking it here moves it.

You can also link from the task's side: the task's **Goal** card has **Link a goal**.

## The right-hand side

- **Owner**. Who holds the goal. **Change owner** hands it to another member.
- **Assignees**. People working on it with you.
- **Comments, Notes and Files**, the same as on a task.

# Objectives and key results

An objective is the outcome. Key results are the proof. *Deliver the smoothest cutover Helix has ever seen* is the objective. *Cut cutover downtime to 2 hours* is how you'll know.



*An objective with four key results*

## Turning a goal into an objective

On a goal's page, open and choose **Convert to objective (OKR)**. While an objective has no key results, **Convert back to a plain goal** is at the bottom of the panel. Once it has key results, remove them first.

On an objective, linked tasks are context. Progress comes from the key results.



## Adding a key result

Click **Add key result**.

**New key result**

Key result  
Hold P1 incidents in cutover week to zero

Detail (optional)  
Counted from the client's incident log.

How is it measured?  
# Number

Start  
3

Target  
0

Weight  
0 /100

Check-in cadence  
Weekly

Owner  
Kevin Haysmer  
khaysmer@outlook.com

Cancel Add key result

The New key result dialog

- **Key result.** What you'll measure. **Detail (optional)** for the rest.
- **How is it measured?**

| TYPE       | PROGRESS                                                                                                |
|------------|---------------------------------------------------------------------------------------------------------|
| Number     | From the <b>Start</b> value to the <b>Target</b> . It works downhill too: from 8 hours of downtime to 2 |
| Percentage | The same, in percent                                                                                    |
| Yes / no   | Nothing until it's marked done, then all of it                                                          |
| Task count | Completed tasks linked to this key result, toward a <b>Target (tasks)</b>                               |

- **Weight.** Its share of the objective, out of 100. It starts at whatever is left of the 100.
- **Check-in cadence.** **Weekly**, **Bi-weekly** or **Monthly**.
- **Owner.** Who checks in on it. It starts as you.



#### HEADS UP

Click **Add key result**. The type can't be changed later, so pick carefully.

## Weights

Every objective has **100 points** of weight to share among its active key results. The bar above them reads **Weights: 80/100** and turns green at 100.

- Short of 100 is allowed, and said plainly: *this objective can reach at most 80%*. It won't stretch the others to make up the difference.
- Over 100 is refused.
- **Redistribute evenly** shares the 100 equally, in one click.

There's no overdraft on the weight budget. We checked.

## Reading a key result

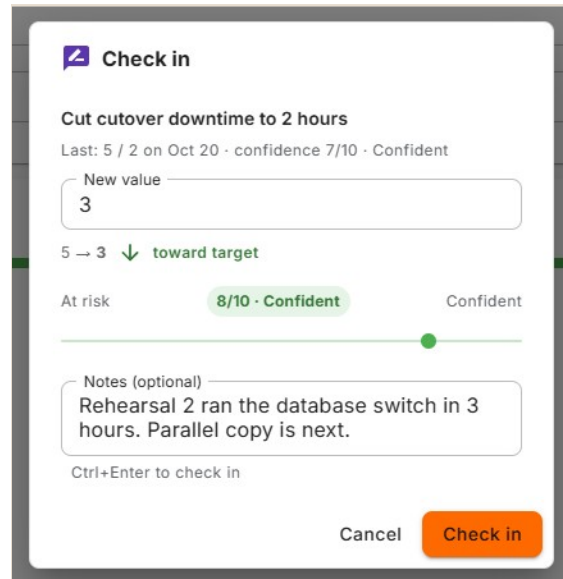
Each row shows the type icon, the name, then:

- **Where it is:** 5 / 2 or 40% / 95%, and how far it has moved, like 50% *done*.
- **Its weight**, its **status** (Not started, In progress, Achieved or Retired), its cadence and when it was last checked in on.
- **due** in orange when a check-in is waiting.
- For a task count: how many tasks are linked. **Link tasks** opens them, with their own **Link a task** and **Quick-create**.
- On the right: the owner, **Check in**, **History** and **:**.



## Checking in

Click **Check in** on a key result. The dialog opens with the last check-in at the top, so you can see where you left off.

A screenshot of the 'Check in' dialog box. At the top, it says 'Check in' with a purple icon. Below that, the title is 'Cut cutover downtime to 2 hours'. The status is 'Last: 5 / 2 on Oct 20 · confidence 7/10 · Confident'. There is a 'New value' input field containing the number '3'. Below the input field, it shows '5 → 3' with a green downward arrow and the text 'toward target'. A progress bar is shown with 'At risk' on the left, '8/10 · Confident' in the middle (highlighted in green), and 'Confident' on the right. Below the progress bar is a 'Notes (optional)' text area containing the text 'Rehearsal 2 ran the database switch in 3 hours. Parallel copy is next.' At the bottom, it says 'Ctrl+Enter to check in' and has two buttons: 'Cancel' and 'Check in' (highlighted in orange).

Checking in on a key result

- **New value.** The current number. Nexus shows the move ( $8 \rightarrow 5$ ) and whether it's **toward target** or **away from target**. For yes/no, it's a switch. For a task count, there's nothing to type: the count of completed linked tasks is recorded for you.
- **Confidence**, from 0 to 10: **At risk** (0 to 3), **Uncertain** (4 to 6) or **Confident** (7 to 10). How sure are you it'll get there?
- **Notes (optional).** What moved it, or what's in the way.

Click **Check in**, or press **Ctrl+Enter** in the notes.

### TIP

Confidence is the honest part. A 9 on a key result that's going nowhere fools exactly one person, briefly. The at-risk card runs on these numbers, so a low score is how you get help.

A key result's value only changes through check-ins. **Edit** changes the name, detail, targets, weight, cadence and owner, never the current value. A wrong check-in is fixed with a new one, or by deleting it (below).



## History

**History** (the chart icon) shows every check-in, newest first: the date, the value, the change from the one before, the confidence, who checked in, and the note. With more than one check-in, a chart shows the trend. *Lower is better* is noted when the target is below the start.

The **undo arrow** on the newest check-in deletes it, and the key result goes back to the value before. Only the newest one can go, so the history stays in order.

## Retire, reactivate, delete

The **:** on a key result:

- **Edit.**
- **Retire.** It stops counting toward the objective and its weight leaves the budget. Its check-ins are kept. **Reactivate** brings it back if its weight still fits.
- **Delete.** Removes it for good. Only offered while it has no check-ins. After that, retire it instead.

## Check-in reminders

When a key result's check-in is due, its owner gets a notification: *Time to check in on Cut cutover downtime to 2 hours*, with the objective and when it was last checked in on. Click it and the check-in opens.

- Weekly is due 7 days after the last check-in, bi-weekly 14 days, monthly one calendar month.
- One reminder per cadence, however long it's been ignored. Nexus nags, but politely.
- Reminders also go by email as a daily digest. Change that in **User settings → Notification preferences**.
- An owner with no Nexus account (an outside contact) gets no reminders.

# Goals elsewhere in Nexus

- **Tasks.** A task's **Goal** card links it to a goal. On an objective's **Linked tasks**, each task lists the key results it counts toward under **Counts toward**. One task can count toward several.
- **Home.** The **Goals & focus** widget lists objectives at risk. The **Personal Goals** and **Goal Progress** quick views and the **OKR Alignment** widget can be added from **Add widget**.
- **Programs and portfolios** show their goals on their dashboards. **Client accounts** show them on the account plan under **Strategic Goals**.



## Who can see a goal

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A goal is seen by its **owner**, its **assignees**, anyone it's **shared** with or holds a RACI role on it, and anyone standing in for the owner. A goal that belongs to a project isn't opened up to everyone on that project, so add the people who should see it.

**Change owner** hands a goal to another member. Unless it's shared with you, you keep only what your other rights on it give you.

## Deleting and bringing back

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ⓘ → **Delete goal** (or **Delete objective**) asks first. It says what goes with it, like *with its 4 key results and 3 check-ins*, and how long the recycle bin keeps it. The linked tasks stay as they are and are linked again if it comes back.

The message afterwards has **Undo** for ten seconds. After that, restore it from the **recycle bin**.

## Common questions

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### Why does my goal say "No tasks yet" instead of 0%?

| Nothing is linked, so there's nothing to measure. Link a task and the bar appears.

### Why can't my objective reach 100%?

| Its weights add up to less than 100. Raise one, or use **Redistribute evenly**.

### Why can't I change a key result's current value?

| Values move through check-ins, so the history stays true. Check in with the right number, or delete the latest check-in.

### Why can't I delete a key result?

| It has check-ins. **Retire** it instead.

### I can't turn on Make this an Objective.

| Objectives come with the Pro plan. On other plans the switch is greyed out and says so.



### Why is my objective at risk when two key results are fine?

At risk averages the latest confidence of every key result that has a check-in. One low score can pull the average under 5.

### Can someone else check in on my key result?

Its owner can, and so can anyone who can edit the objective.

### Where did my reminder go?

Reminders go to the key result's owner, once per cadence. If the owner is an outside contact, nobody is reminded.

