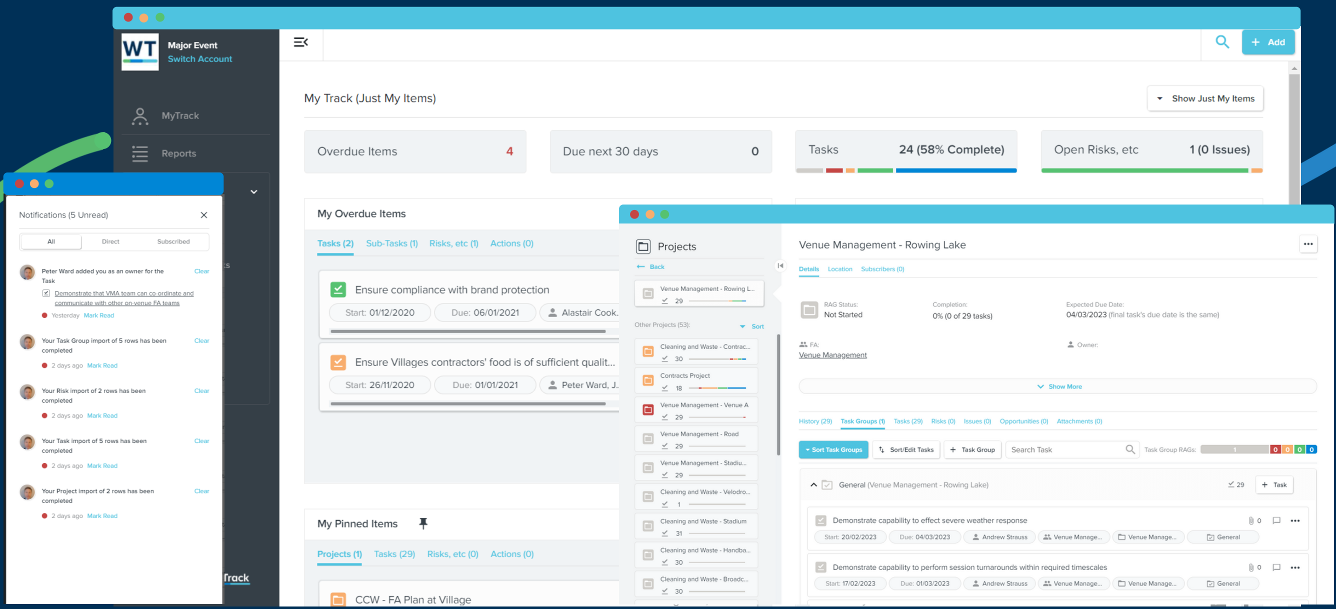
WeTrack



Project Management in WeTrack

A quick-start support guide for users, from finding and editing information to reporting on your projects and tasks

Inside this guide

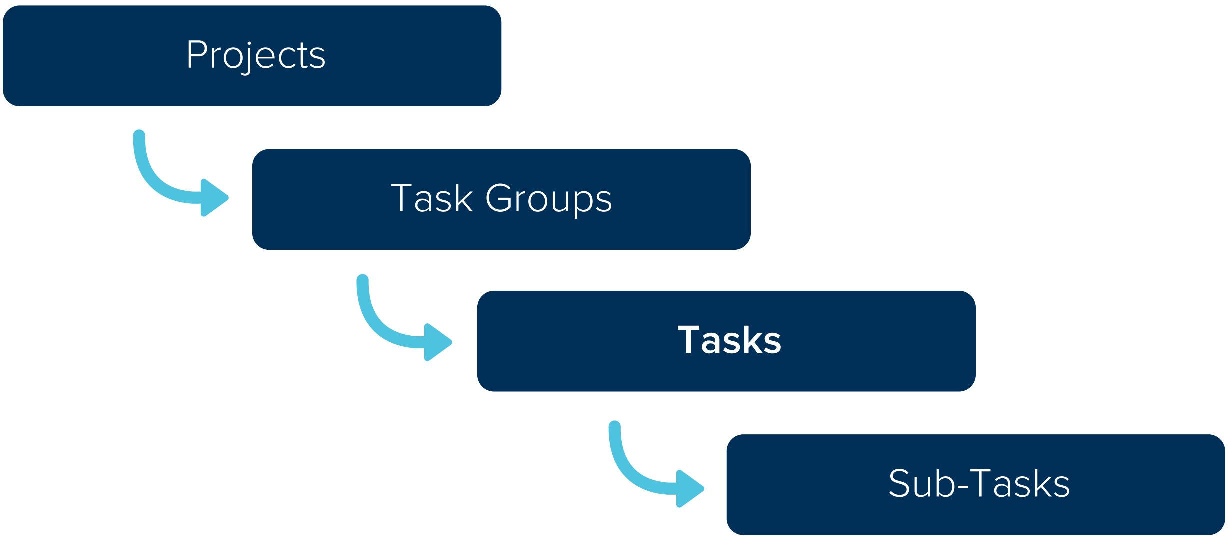
Welcome to WeTrack! We are delighted to have you with us. In this guide we introduce our project management system - helping you to get started, understand how the module works, and begin creating, viewing and updating your projects and tasks.

We'll introduce the nature of project management in WeTrack, before diving into the detail on navigating the system, creating information, and finding information. We'll show you how to edit, report on, and share information; and we'll show you how notification works as well as where you can find further support while using WeTrack.

Project Management in WeTrack

Before we dive into it, let's take a step back and outline how project management works in WeTrack.

A project is a distinct set of work with an achievable endpoint; it can consist of hundreds of tasks, or fewer than twenty. A task is the basic unit of work in WeTrack, which could last for one day, or for several months. Tasks can be insignificant actions which just require monitoring, or very important milestones upon which your project depends.



Tasks in the same project can be grouped into task groups for further categorisation; tasks can also be divided into smaller sub-tasks. These tasks and sub-tasks are then assigned to departments and owners, who are the people doing the work.

There are plenty of other ways to categorise your projects and tasks, such as using tags. In Tag Manager, in Settings, admin users can create tags that can be applied to any items in the WeTrack system. This allows you to create further types of information to filter by or report on.

The RAG status: rating your tasks

The RAG system is the coloured rating system which indicates task progress in WeTrack. There are five options: Grey represents tasks that have not yet started, Blue represents tasks that are complete, and the traffic light of Red, Amber and Green can be used for tasks that have slipped behind, are in danger of slipping, or are on track.

You can update the RAG status of any task anywhere in the system, by simply clicking on its RAG bubble and selecting a new colour. Any changes in RAG rating, and any related comments, are recorded in the task's audit history.

Not Started

Work has not started on this item.

Overdue / Issues

Behind schedule or below required standard.

Slipping / No Progress

Falling behind or has not started on time.

On Track

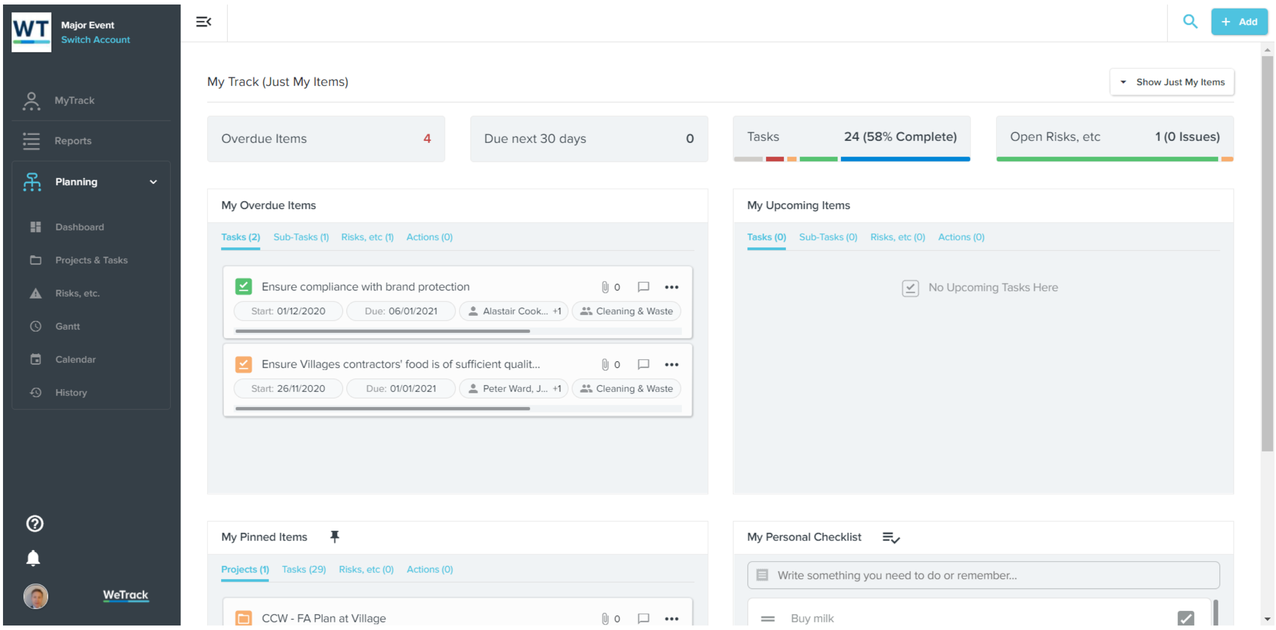
In progress and on track for completion.

Complete

Completed to required standard.

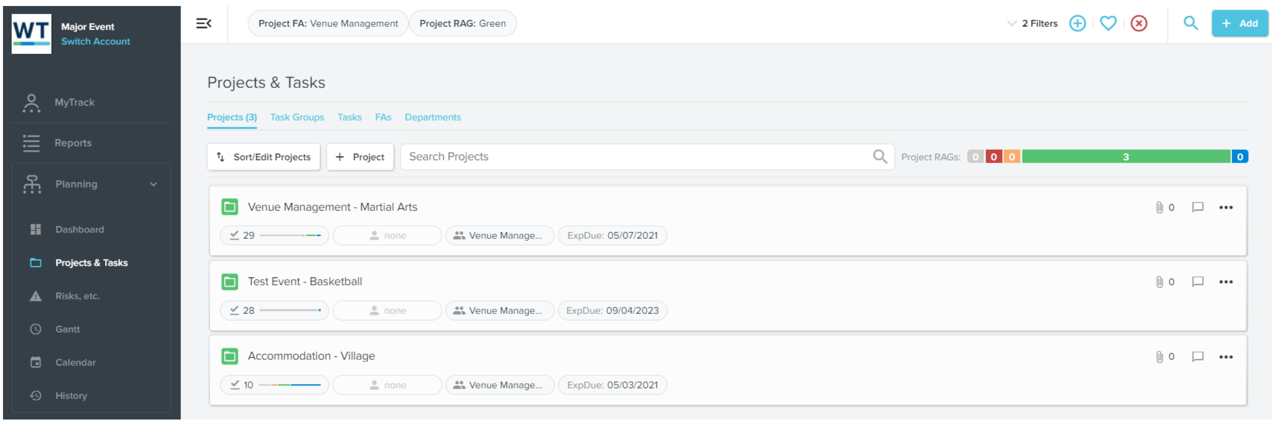
Navigating the System

When you first log in to WeTrack, you'll arrive at this 'MyTrack' page. We'll keep referring back to here, as it's a really useful hub for your work in WeTrack. It shows your overdue, upcoming, pinned and personal tasks, and lets you edit a lot of information directly in this view.



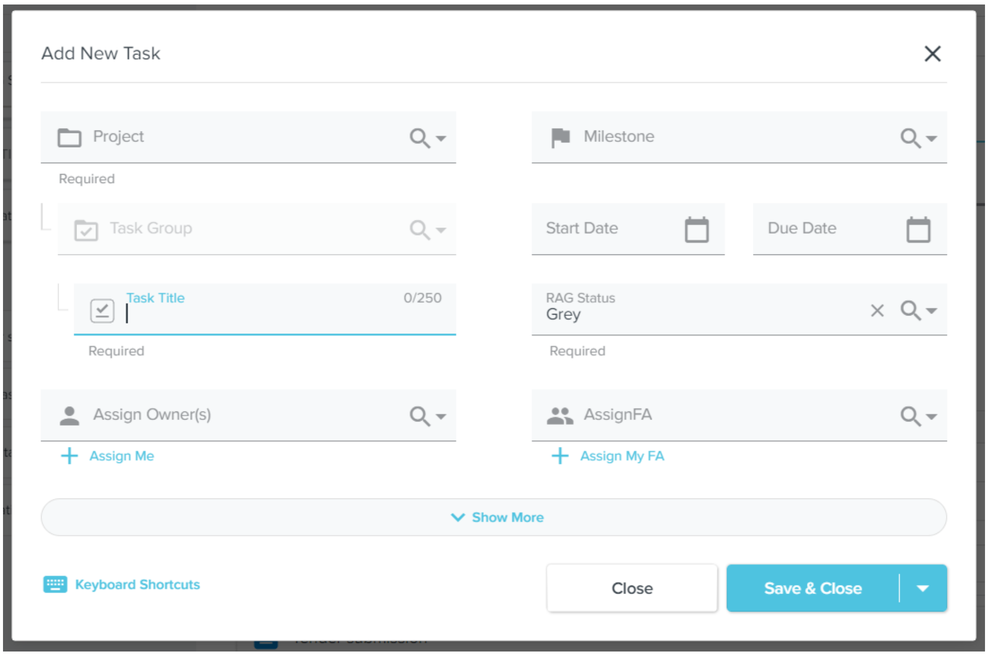
MyTrack sits in the left-hand sidebar, next to Reports - more on that later. In the rest of the sidebar, you can navigate through different views within the project management module. 'Projects & Tasks' is the primary place to go to view all of your plans.

The toolbar at the top of the page lets you search by keyword for any information in the module, filter the information you can see, or create new information. Filters allow you to drill down into the information you really want to view on any page, and you can save favourite filters to make them easier to re-apply. Here, we've applied an FA and a RAG filter to a list of Projects.



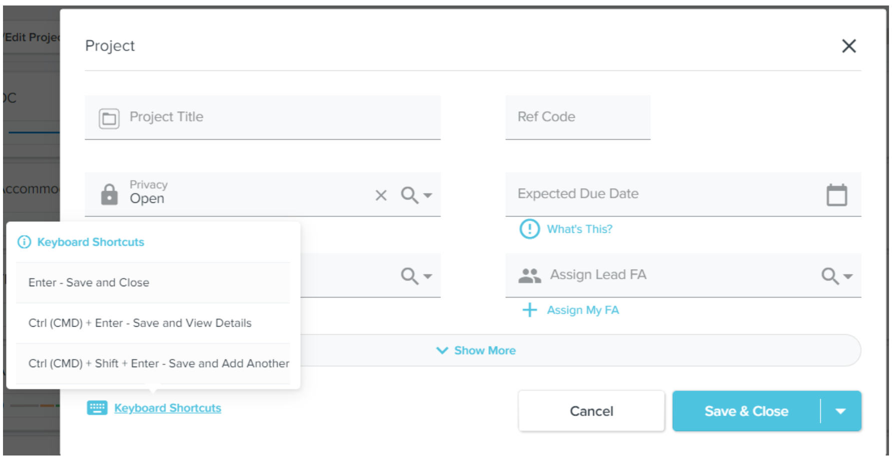
Creating information

You can always go to the top right-hand corner of any WeTrack page to create new projects, tasks and other information. Simply click 'Add' and select what you want to create - here, we demonstrate creating a task. For any item type you choose, and no matter where you are in the WeTrack system, an 'add modal' will appear, allowing you to input any mandatory and optional information for the item.



Here, you input a title, and any other necessary information, before clicking 'Save'. Any required fields will be marked as such.

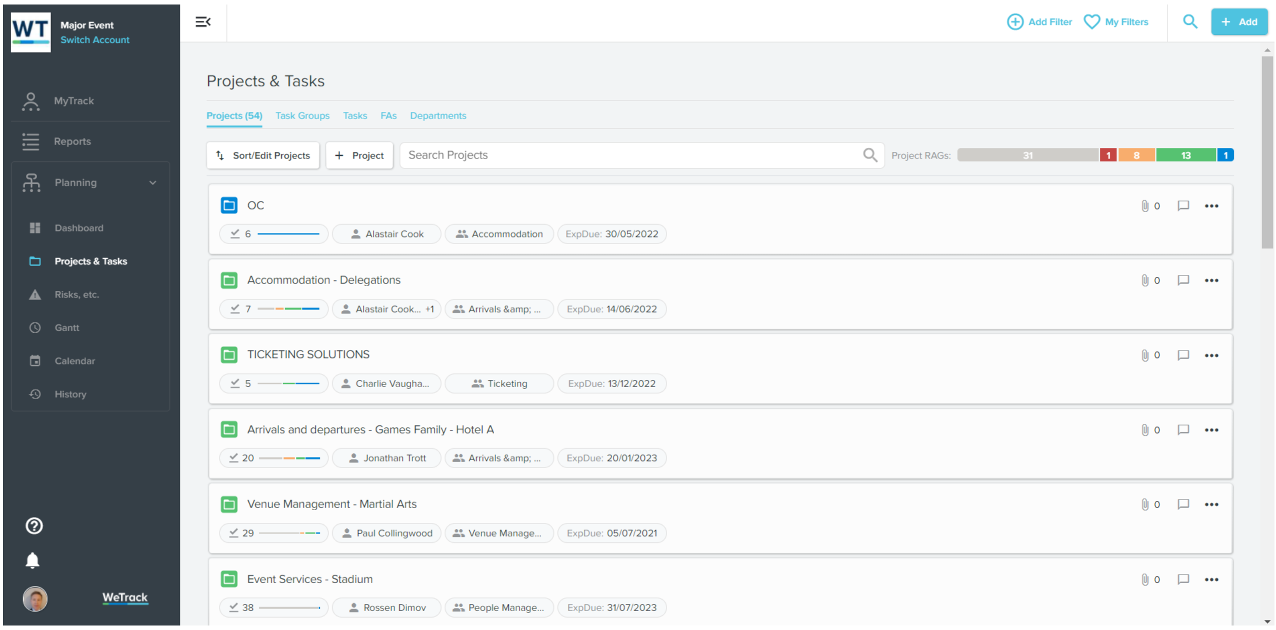
You will find options to create new items in a variety of different places around the WeTrack system. For example, you can add task groups and tasks within a project, sub-tasks within a task, and any item at the top of a list of that item type. In each case, a modal will appear, with the available required and optional fields.



There are plenty of shortcuts in the WeTrack system! For example, just hit 'Enter' to create a Project or Task as soon as you've given it a title.

Finding information

We've already mentioned MyTrack - there you can find your overdue, upcoming, pinned and personal items, clicking into any item for further detail. The place to go to find all of your projects and tasks is the 'Projects & Tasks' tab in the left-hand sidebar.



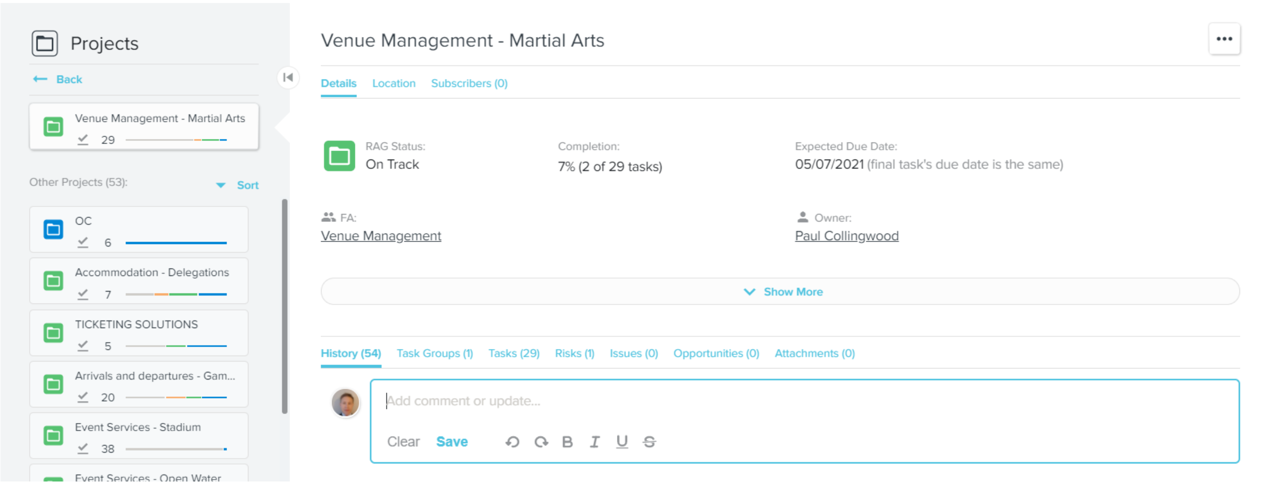
Here are lists of your projects, task groups, tasks, departments and department categories. Remember, you can use the filters at the top of the page to only display the information you need to see. Each item is displayed in a card, which shows information pertaining to the item; you can use the Sort / Edit button at the top of the list to choose which information is displayed on the cards.

- Clicking into a project or task card takes you to that item's details page, which provides full information about the item.
- Clicking into a task group takes you to the project details page in which that task group sits, with the task groups expanded.
- Clicking into a department or department category takes you to a list of tasks filtered to that department or department category.

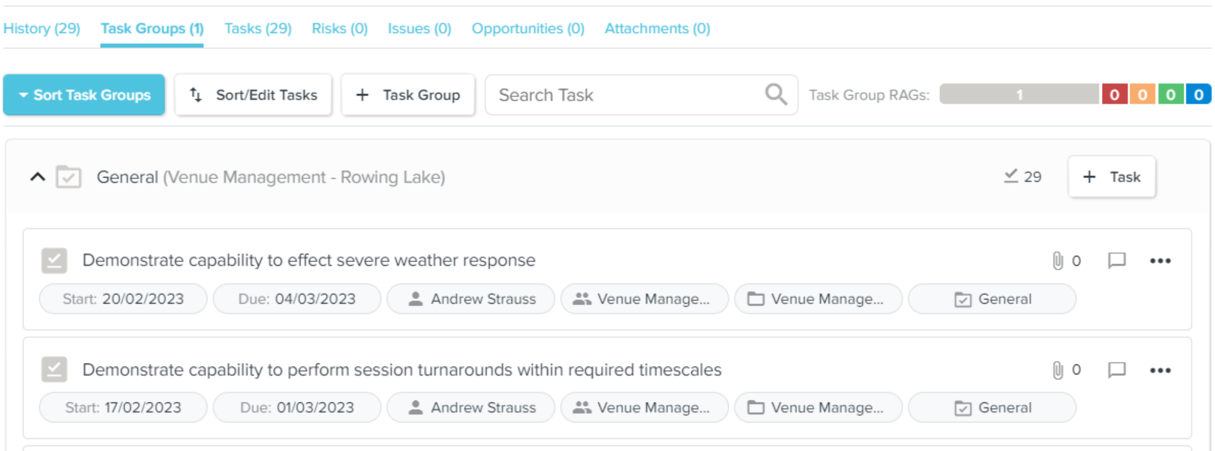
We'll go into more detail on how to edit information on page 10, but the premise of WeTrack is that anywhere you can see a piece of information, you can edit that information. In a project or task card, hover over the title and click the blue 'Edit' button to make a change, or click on any other piece of information to bring up the option to edit it.

Project detail

The Project Details Page gives an overall summary of the project, the task groups and tasks it contains, any risks, issues and opportunities, any comments or attachments, the people and groups responsible for its completion - and much more! In the top half of the page you can find all the main details about the project, as well as its location and subscribers.



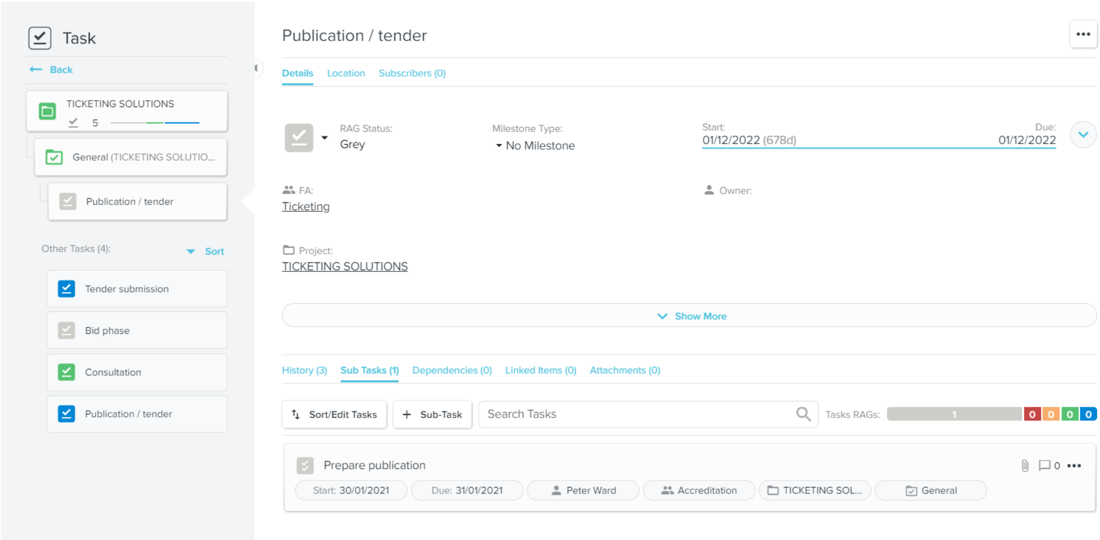
In the bottom half of the page are tabs that reveal greater information about the items within or associated with that project. You can also add task groups and tasks to the project in these tabs: simply click 'Add Task Group' or 'Add Task' to bring up the 'add modal'.



Prefer something a little more visual? Explore our Gantt chart and Calendar views, both available from the left-hand sidebar. Read more about those areas in our help centre.

Task detail

The Task Details Page is similar to that of a project, with key information, location and subscribers in the top half of the page, and associated items in the bottom half.



The bottom half of the page are a series of tabs:

- History: This tab lets you add comments to the task, as well as showing you a full audit history of all changes made to the task.
- Sub-Tasks: This shows a list of all of the sub-tasks that work towards the completion of the parent task. You can add new sub-tasks here.
- Dependencies: Here, you can see any tasks that this task depends upon or that depend upon it, as well as adding new dependencies.
- Linked Items: Here, you can see any tasks, sub-tasks, projects, risks, issues or opportunities that have been associated to this task, or you can create new links between items.
- Attachments: Here, you can upload files or links to the task, or view any existing files or links.

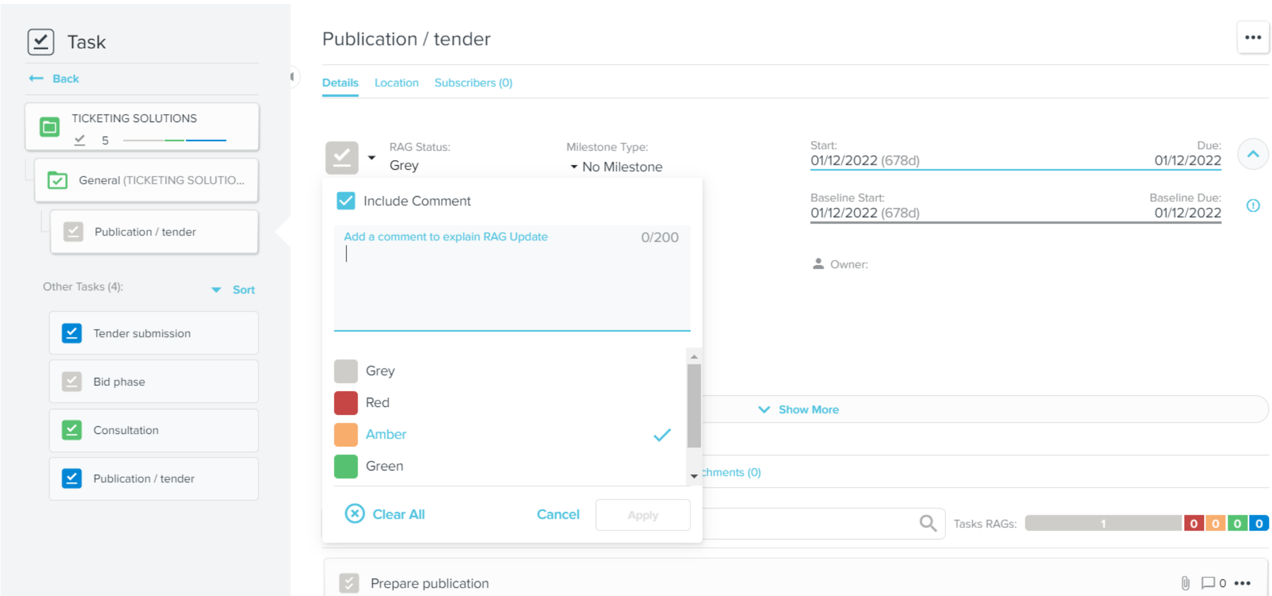
You'll also see on a details page, in the left-hand side panel, the hierarchy of items that you have been looking at. The project and task group that this task sits in are displayed, along with a list of other tasks in the same task group. This allows you to quickly navigate between similar or related items.

Dependency management is a big part of WeTrack's project management system. Dependencies are when one task relies on another being completed. The Gantt chart view is recommended for the easiest visual editing of dependencies - learn more here.

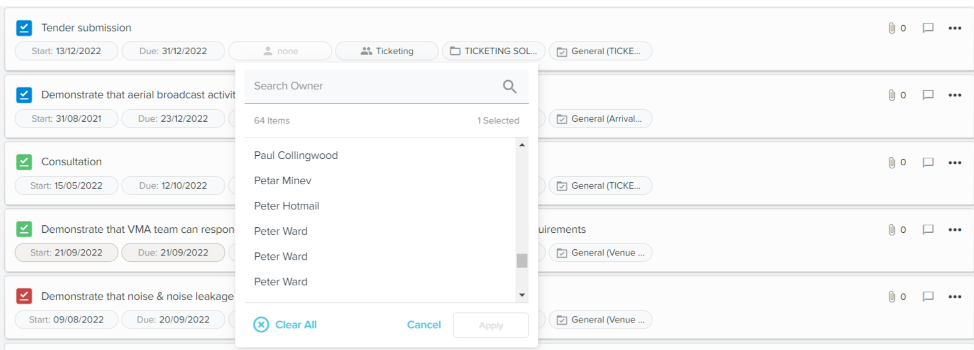
Editing and Updating information

The premise of editing in WeTrack is that anywhere you can see a piece of information, you can edit it.

You can edit a task or sub-task's RAG status wherever you see it; simply click on a RAG bubble and select a new colour. You can include a comment if you wish, and, if you are changing the RAG status to red or amber, you must.



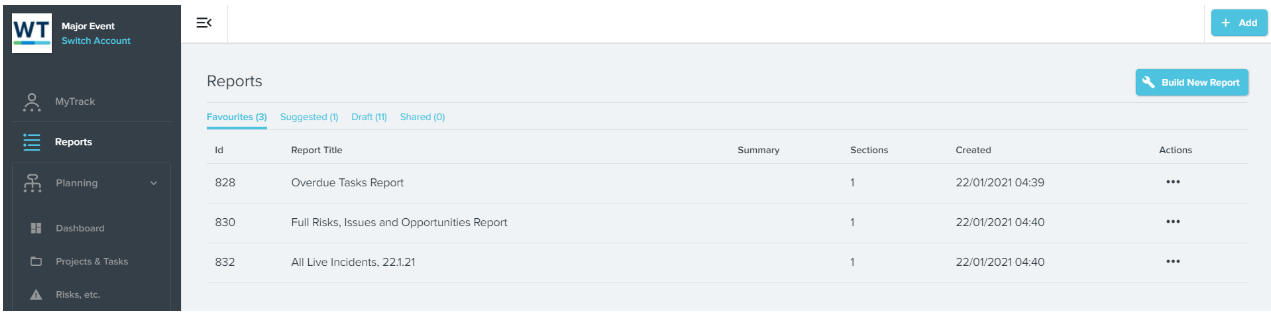
You can edit any information you see in a details page. In most cases, you can hover over the information you wish to change and click 'Edit'. In other cases, if it is an item of information selectable from a dropdown, you can click on the information and choose a new option.



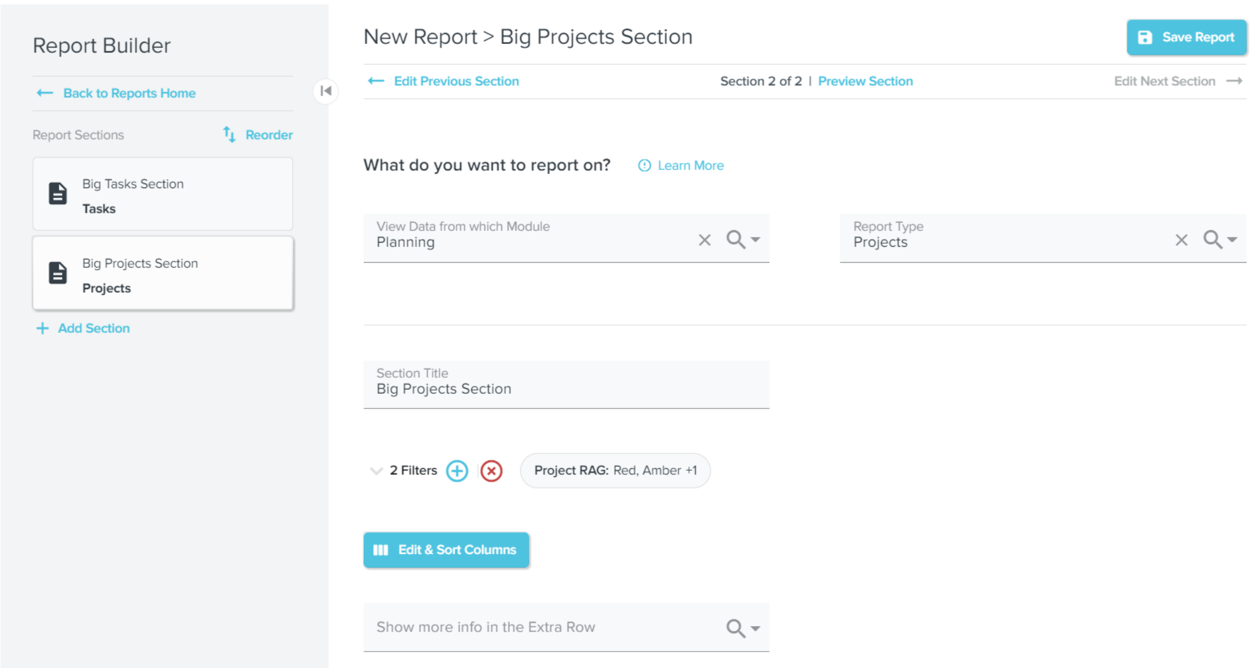
You can also edit any information you see in a card. This might be in MyTrack, or in any list of projects, tasks or other items. Simply click on the piece of information you want to change, type or select new information, and click 'Apply'. You can also edit the title of any item by hovering over the title, clicking the blue 'Edit' button that appears, typing a new title and clicking 'Save'. Easy!

Reporting on information

One of the most popular areas of the WeTrack system is the Reporting centre, found in the left-hand sidebar. Sets of filters allow you to build a bespoke report, report sections can be layered to give a fuller, more custom report, favourite reports can be saved and suggested to other members of your team, and reports can be downloaded to PDF or XLSX.



To get started, click 'Build New Report' on the right-hand side of the page. This takes you to the report builder, pictured.

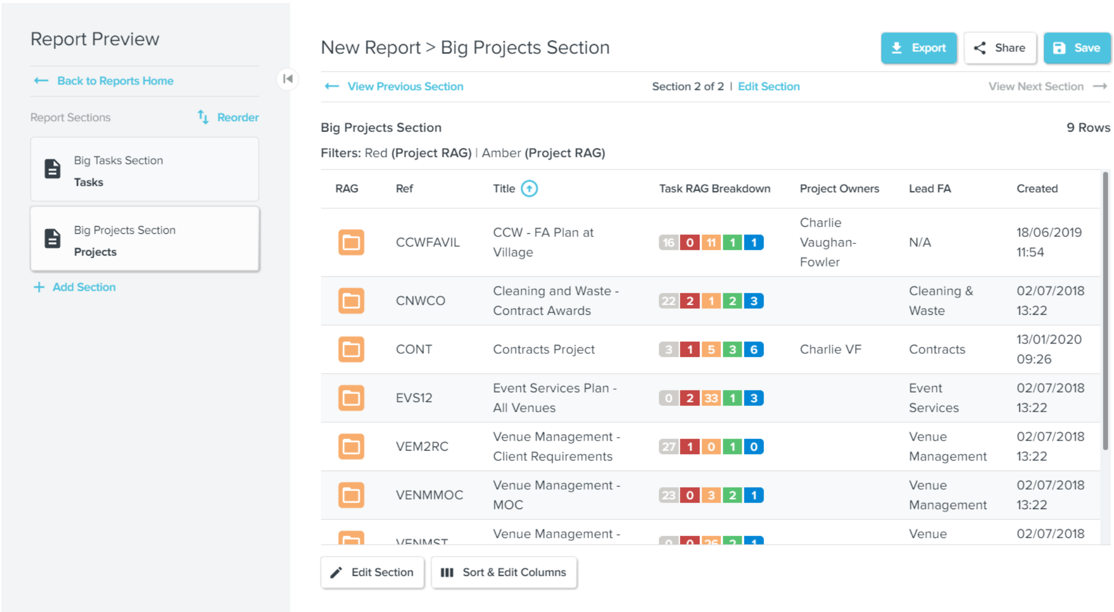


Select the module and the item type that you want to report on. Add any filters, choose which columns you want to display, select any information to be displayed in the 'extra row' between each item in the report, and input a title and optional description.

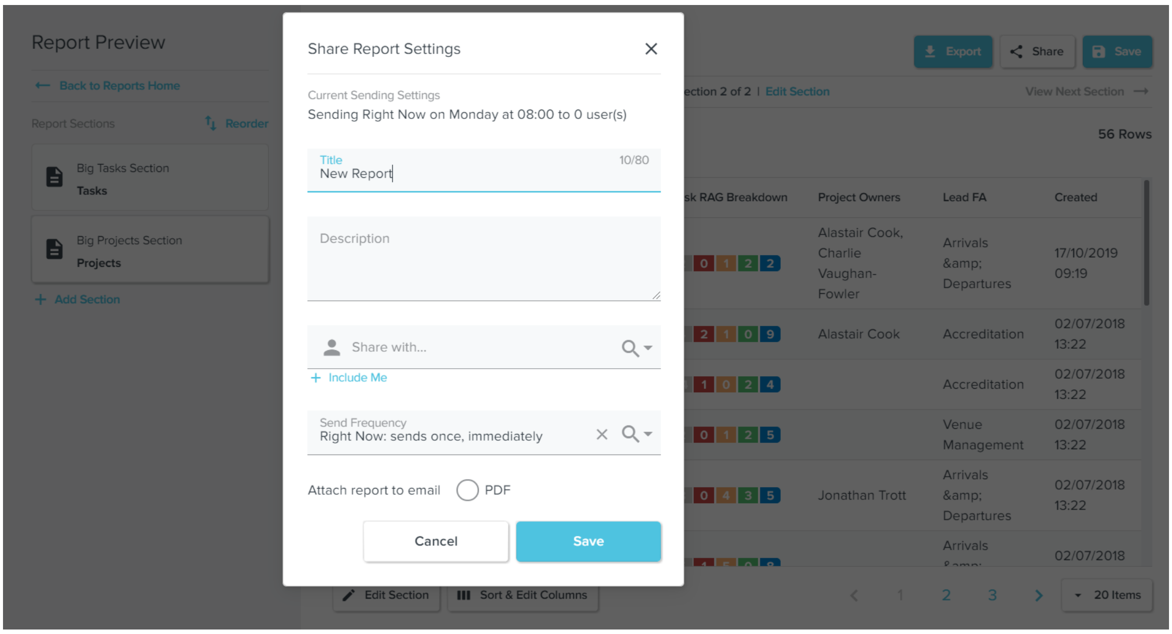
Then you can add another section to the report, or preview it straightaway. You can create and move easily between multiple sections of the same report in one view - this can be useful as a comparison tool or to combine separate reports into one PDF output.

Viewing and Sharing Reports

Once you have built a section of a report, clicking 'Preview' takes you to the Report Preview Page, where you can view your report. In the top right-hand corner, you can download the report, share the report, or save it as a favourite or suggested report.



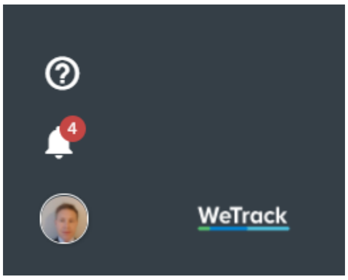
To share the report with yourself or other members of your team, click 'Share', give the whole report a title and description, choose the users you wish to share it with, and then select a frequency and start and end date for the report to be shared.

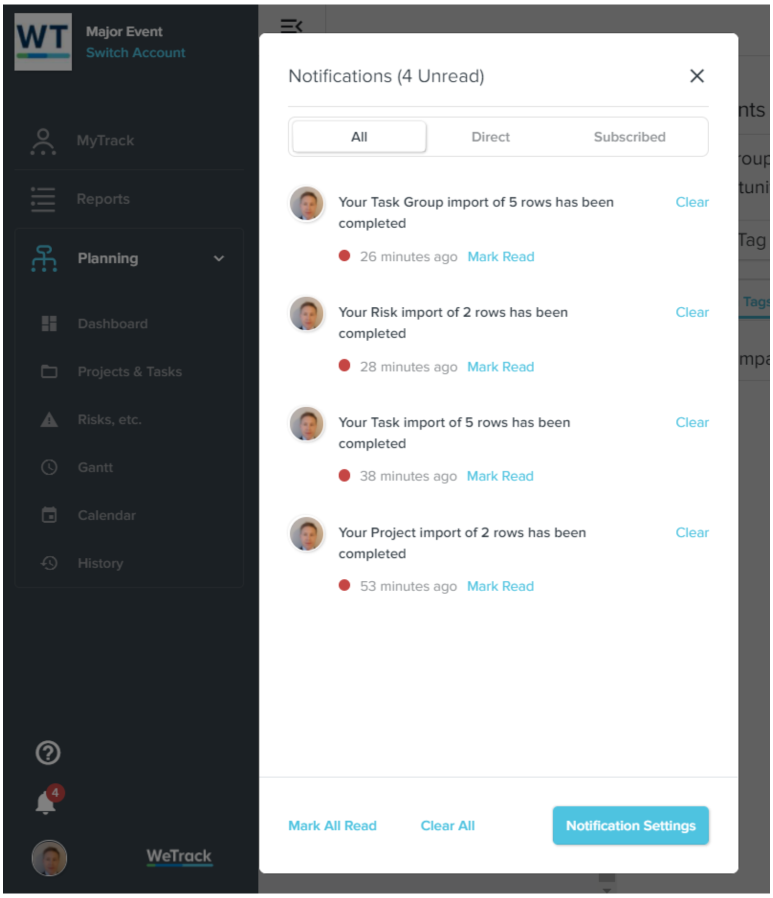


Once you have filled in all the necessary information, click 'Save' to set up the sharing. This report will then be sent out to the chosen users at the chosen frequency; it will also be visible and available to edit in the 'Shared Reports' tab of the Reports homepage.

Notifications and Preferences

Users can now see their notifications within the WeTrack system. Find the notification centre by clicking the 'bell' icon in the bottom left-hand corner of any WeTrack page, with a number displaying next to the bell revealing how many unread notifications you have.





The notification centre allows users to:

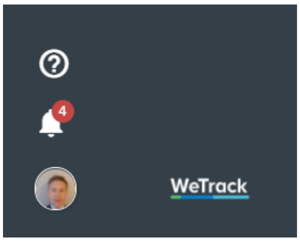
- see a headline update of changes to items which they own or subscribe to;
- click on a notification to be taken to the history feed of an item that has changed;
- mark notifications as read and unread, and clear them;
- and view other news and updates sent from the WeTrack team.

This centre is designed to boost communication and collaboration within your WeTrack system, helping you to stay on top of items and updates that require your attention.

At the very bottom of the left-hand sidebar, you can click on your avatar to bring up My Preferences. In My Preferences, you can update your profile, password or notifications, as well as viewing your permission settings.

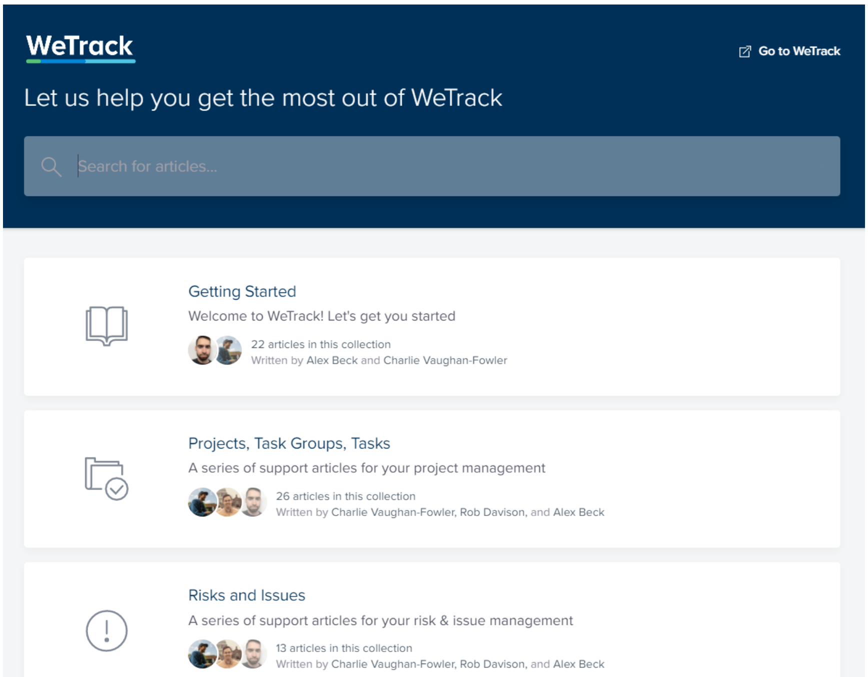
You can also log out of the WeTrack system here, clicking on your avatar and selecting 'Logout'.

Support and Learn more



Also in the bottom left-hand corner of any WeTrack page are our support options. Click on the question mark, and then choose to either view our help centre or enter our live chat support.

Our help centre has almost 200 articles explaining different aspects of the WeTrack system, and you can search by keyword to quickly find the article you need.



If you want to ask us a question directly, feel free! Select 'Chat to our team' and one of our friendly team will respond within minutes.

That is the end of our introduction to the WeTrack project management module. We hope you've learned plenty, and we know there's still a lot more to explore. Our help centre is the first place to go if you want to learn about risks, issues and opportunities, settings and permissions, or any other WeTrack functionality or module. Or, just get in touch. We'd love to hear from you!

Thank you for reading this guide and we look forward to working with you.