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.

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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.





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.

Major Event Switch Account	E Project FA: Venue Management Project RAG: Green	✓ 2 Filters ⊕ ♥ ♥
0 M.T	Projects & Tasks	
MyTrack	Projects (3) Task Groups Tasks FAs Departments	
Reports	1 Sort/Edit Projects + Project Search Projects	Q Project RAGs: 0 0 0 3 0
Planning ~	Venue Management - Martial Arts	· · · · ·
Dashboard	✓ Venue Wanagenent - Marian Arts ✓ 29 ▲ nons ▲ Venue Manage ExpDue: 05/07/2021	
Projects & Tasks		
🛕 Risks, etc.	Test Event - Basketball	₿ o
🕓 Gantt		
Calendar	Accommodation - Village	D •
History	✓ 10 ▲ none ▲ Venue Manage ExpDue: 05/03/2021	

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.

Add New Task			×					
Project	Q, . .	Milestone	Qv					
Required								
Task Group	0, -	Start Date	Due Date					
Task Title	0/250	RAG Status Grey	× Q,=					
Required		Required						
Assign Owner(s)	Q, -	AssignFA	Q, -					
+ Assign Me		+ Assign My FA						
	✓ Show More							
E Keyboard Shortcuts		Close	Save & Close 🔹 🔻					
		Close	Save & Close					

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.

Edit Project			×
Project Title		Ref Code	
ccommo Privacy Open	×Q×	Expected Due Date What's This?	Ö
Keyboard Shortcuts Enter - Save and Close	Q, *	Assign Lead FA	Q, -
Ctrl (CMD) + Enter - Save and View Details		+ Assign My FA	
Ctrl (CMD) + Shift + Enter - Save and Add Another	✓ Show	More	
Expoard Shortcuts		Cancel Save	& Close 🛛 🔻

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.

Major Event Switch Account	, ⊐z	⊕ Add Filter ♥ My Filters Q +
O Mutrante	Projects & Tasks	
	Projects (54) Task Groups Tasks FAs Departments	
	1 Sort/Edit Projects + Project Search Projects	Q Project RAGs: 31 1 8 13 1
Planning ~	oc	A o 🗖 🚥
	✓ 6 ▲ Alastair Cook ▲ Accommodation ExpDue: 30/05/2022	
Projects & Tasks	Accommodation - Delegations	₿ o • • •
	(🛫 7 ————) (🏝 Alastair Cook +1) (🎎 Arrivals & amp;) (ExpDue: 14/06/2022)	
	TICKETING SOLUTIONS	0 0 🖵 🚥
	🗹 5 ——— 🏝 Charlie Vaugha) 🏦 Ticketing 🔰 ExpDue: 13/12/2022	
	Arrivals and departures - Games Family - Hotel A	00 🖵 🚥
	🗹 20 — ExpDue: 20/01/2023	
•	Venue Management - Martial Arts	00
Ø ▲	🗹 29 ———————————————————————————————————	
📮 👩 <u>WeTrack</u>	Event Services - Stadium	D o 🖵 •••
Wendck	🗹 38 — ExpDue: 31/07/2023	

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.

Projects	Venue Management - Martial Arts				
← Back	Details Location Subscribers (0)				
Venue Management - Martial Arts 29 Other Projects (53): Sort		iompletion: % (2 of 29 tasks)	Expected Due Date: 05/07/2021 (final task's due date is the same)		
OC ⊻ 6	# FA: Venue Management		Owner: Paul Collingwood		
Accommodation - Delegations			✓ Show More		
TICKETING SOLUTIONS	History (54) Task Groups (1) Tasks (29) Ri	sks (1) Issues (0) Opportuniti	es (0) Attachments (0)		
Arrivals and departures - Gam 20	Add comment or update			,	
Event Services - Stadium	Clear Save O Q I	в <u>і U</u> S			
Event Services - Open Water					

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'.

History (29) Task Groups (1	l) Tasks (29) Risks (0) Issues (0) Op	oportunities (0) Attachmen	nts (0)					
→ Sort Task Groups	Sort/Edit Tasks	- Task Group	Search Task	Q	Task Group RAGs:	1		0 0 0	0 0
▲ 🔽 General (Ven	ue Management - Ro	wing Lake)				⊻ 29	+	Task	
Demonstrate c Start: 20/02/2023	apability to effect sev Due: 04/03/2023	rere weather res		age 🗈 Vent	ue Manage	General	0 0	□ …	
Demonstrate c Start: 17/02/2023	apability to perform s	ession turnarour	nds within required time Strauss 🔐 Venue Man		ue Manage	General	0 0		-

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 <u>our help centre</u>.

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.

🗹 Task		Publication / tender			
← Back	9	Details Location Subscribers	s (0)		
TICKETING SOLUTIONS ✓ 5 ✓ General (TICKETING SOLUTIO		RAG Status: Grey	Milestone Type: • No Milestone	Start: 01/12/2022 (678d)	Due: 01/12/2022
Publication / tender		EA: Ticketing		🔔 Owner:	
Other Tasks (4): Sort Cther submission		TICKETING SOLUTIONS			
Bid phase				V Show More	
Consultation		History (3) Sub Tasks (1) Dep	pendencies (0) Linked Items (0) Attachm	nents (0)	
Publication / tender		↑↓ Sort/Edit Tasks + Se	ub-Task Search Tasks	Q Tasks RAGs:	1 0 0 0 0
		Start: 30/01/2021	Due: 31/01/2021 Peter Ward	Accreditation TICKETING SOL.	i □ 0 •••

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 - <u>learn more here</u>.



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.

Back	Details Location Subscribers (0)			
TICKETING SOLUTIONS	RAG Status:	Milestone Type:	Start:	Due:
-	Grey	 No Milestone 	01/12/2022 (678d)	01/12/2022
General (TICKETING SOLUTIO	✓ Include Comment		Baseline Start: 01/12/2022 (678d)	Baseline Due: 01/12/2022
Publication / tender	Add a comment to explain RAG	Update 0/200		
			A Owner:	
Other Tasks (4): Sort				
Tender submission				
	Grey			
 ✓ Tender submission ✓ Bid phase 	Grey		V Shraw More	
	= -		✓ Show More	
Bid phase	Red	✓ Î		

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.

Start: 13/12/2022 Due: 31/12/2022	🚊 none 🏻 👫 Ticketing	TICKETING SOL	General (TICKE		
Z Demonstrate that aerial broadcast activit	Search Owner	Q		() o	
Start: 31/08/2021 Due: 23/12/2022	64 Items	1 Selected	General (Arrival		
Consultation	Paul Collingwood	*		0 0	
Start: 15/05/2022 Due: 12/10/2022	Petar Minev		General (TICKE		
	Peter Hotmail				
Demonstrate that VMA team can respon	Peter Ward		uirements	Q 0	••
Start: 21/09/2022 Due: 21/09/2022	Peter Ward		General (Venue		
	Peter Ward				
Z Demonstrate that noise & noise leakage		-		0 0	••

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.

Major Event Switch Acco	nt	≡<					+ Add
0		Reports					🔦 Build New Report
MyTrack		Favourites (3)	Suggested (1) Draft (11) Shared (0)				
Reports		Id	Report Title	Summary	Sections	Created	Actions
Planning		828	Overdue Tasks Report		1	22/01/2021 04:39	
Dashboard		830	Full Risks, Issues and Opportunities Report		1	22/01/2021 04:40	
🖿 Projects & Tas		832	All Live Incidents, 22.1.21		1	22/01/2021 04:40	
🛕 Risks, etc.							

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

Report Builder		New Report > Big Projects S	Big Projects Section		
- Back to Reports Home		← Edit Previous Section	Section 2 of 2 Preview Section		Edit Next Section \rightarrow
Report Sections					
Big Tasks Section		What do you want to report on?	Learn More		
Tasks		View Data from which Module Planning	×Q-	Report Type Projects	× Q -
Big Projects Section Projects					
+ Add Section					
		Section Title Big Projects Section			
		V 2 Filters 🕂 🗴 Project RAG: Red	d, Amber +1		
		Edit & Sort Columns			
		Show more info in the Extra Row	Q, *		

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.

← Back to Reports Home		← View Previous Section		Section 2 of 2 Edit Section		View Next Section -			
Report Sections 1 Reorder		Big Projects Section Filters: Red (Project RAG) Amber (Project RAG)						9 Rot	
		RAG	Ref	Title 📀	Task RAG Breakdown	Project Owners	Lead FA	Created	
Big Projects Section Projects			CCWFAVIL	CCW - FA Plan at Village	16 0 11 1 1	Charlie Vaughan- Fowler	N/A	18/06/2019 11:54	
+ Add Section			CNWCO	Cleaning and Waste - Contract Awards	22 2 1 2 3		Cleaning & Waste	02/07/2018 13:22	
			CONT	Contracts Project	3 1 5 3 6	Charlie VF	Contracts	13/01/2020 09:26	
			EVS12	Event Services Plan - All Venues	0 2 33 1 3		Event Services	02/07/2018 13:22	
			VEM2RC	Venue Management - Client Requirements	27 1 0 1 0		Venue Management	02/07/2018 13:22	
			VENMMOC	Venue Management - MOC	23 0 3 2 1		Venue Management	02/07/2018 13:22	
			VENMST	Venue Management -			Venue	02/07/2018	

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.

	Share Report Settings	×			🛨 Export < S	Share 🖪 Sa
Back to Reports Home	Current Sending Settings Sending Right Now on Monday at 08:00 t	ection 2 of 2 Edit Section				
eport Sections 1 Reorder	Sending Right Now on Monday at 08:00 t	o o user(s)				56 R
Big Tasks Section	Title New Report	10/80				
Tasks			sk RAG Breakdown	Project Owners	Lead FA	Created
Big Projects Section Projects Add Section	Description		0 1 2 2	Alastair Cook, Charlie Vaughan- Fowler	Arrivals & Departures	17/10/2019 09:19
	Share with	Q =	2 1 0 9	Alastair Cook	Accreditation	02/07/2018 13:22
	+ Include Me		1024		Accreditation	02/07/2018 13:22
	Send Frequency Right Now: sends once, immediately	×Q×	0 1 2 5		Venue Management	02/07/2018 13:22
	Attach report to email OPDF		0435	Jonathan Trott	Arrivals & Departures	02/07/2018 13:22
	Cancel	Save	4 5 0 0		Arrivals	02/07/2018

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 lefthand 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 <u>help centre</u> 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 <u>help centre</u> 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.