



Project Tracker Quick Start Guide

This Quick Start Guide covers the basics of getting started with Project Tracker. For more details on Project Tracker, Document Manager or any other aspect of WorkZone, view the online help guides, accessible by clicking "Help" at the top right of the screen within WorkZone. Or for help of any kind, contact WorkZone Customer Support at 610-275-9861 or help@workzone.com.

Project Tracker allows you to organize and monitor the status of ongoing projects. Its simple user interface and easy, web-based access allow the entire team to stay on the same page and helps projects run more smoothly.

Setup

All customization of Project Tracker settings is done in the **ALL WORKSPACES** view and will apply globally to all of your workspaces. Click on the **Setup** link from the main navigation. On the left menu, under **Global Settings**, click **Features to Display**.

Within the **Main Features** section, you can choose to enable or disable Project Tracker by default for all new workspaces, as well as choose whether Client and Partner users will have default access to Project Tracker.

Additionally, you can choose to use Dependencies / durations and the Gantt chart view within Project Tracker. In most projects, certain tasks cannot begin until other tasks are completed (known as one task being "dependent" on another task), and the project plan needs to reflect this. WorkZone allows you to establish linkages between task dates and also to see project timing and durations in a graphical view known as a Gantt chart.

Time and Expense Tracking, two optional tools within Project Tracker, are also turned on or off in this view.

Additional Project Tracker settings:

Below **Global Settings** on the left menu of **Setup**, there is a main heading for Project Tracker that contains many customization options. They include:

- Selecting **Columns to display** in the Task List view
- Managing and deleting **Project templates**
- Creating **Responsible parties**
- Creating and managing **Expense classes**
- Selecting **5-day or 7-day work weeks**
- Selecting the default option for **adding new tasks to calendar**
- Creating and managing **Time/expenses/categories**
- Designating **Holidays/nonworking days**

Adding a Project

From the Task List view, click the **Add Project** green button. The "Create Project" window will appear. Add project information as specified.

Under the **Add Tasks** section, choose whether you wish to add tasks manually (the default), copy tasks from an existing template or import tasks from MS Project or Excel.

Click the green **Save and Add Tasks** button to save the new project and begin to add tasks to the project.

[Note: a project will not display in the Task List view until there is at least one task for that project.]

Adding a Task

To create a task for an existing project, from the Task List click the green **Add Task** button. If you first click the checkbox next to a specific task or project before clicking Insert Task, the new task will be indented underneath the

item you have selected. If no checkbox is selected, you will need to select the project from a drop-down list. Within a grouping of tasks, the new task will then be sorted chronologically by end date.

The "Add Task" window will appear. Add task information as specified. The task name and end date fields are required. If you do not specify an end date, WorkZone will enter today's date as the default end date.

To add additional tasks at this time, click **Add another task**. Another row will appear for the next task.

Click **Save** to create your tasks and return to the Task List.

Indenting/outdenting

You may indent (move to right) or outdent (move to left) a task to help organize a project into multiple phases or groups with tasks at different levels.

To indent a task, select the checkbox to the left of the task and then click the **Indent** button, located below the green **Add Project** button. The selected tasks will be indented (moved to the right and beneath) the task above them, thereby creating those tasks above as summary tasks.

To outdent a task, select the checkbox to the left of the task and then click the **Outdent** button, located below the green **Add Project** button. The selected task will be outdented (moved to the left and above) the task below it, thereby creating the selected task as a summary task of the task below it.

Adding a dependency

To have a task's start date determined by the completion date of a previous task, you make the task "dependent" on the prior task. Dependencies can only be added after a task has been created. The dependencies column is located to the right of the Duration column (↳ icon at the top).

To create a dependency for a task (link its start date to the end date of a previous task), click the box in the dependencies column to the right of the task. The Dependencies window will open.

You will be presented with a list of any tasks that have already been linked to this task. Click on the green **Add Predecessor** button to create additional dependencies. Browse through the task levels by clicking on summary tasks (if any). Select the task on which the current task should be dependent. Click **OK** to confirm your selection.

Adding an attachment to a task

You can provide links (attachments) from tasks in Project Tracker to documents or folders within Document Manager, providing enhanced coordination for files associated with the project. Attachments can only be made after a task has been created. The attachments column is located to the left of the task name (has a paper clip icon 📎 at the top).

To create a link from a task to a document or folder, click the box in the attachments column next to the task. The Attachments window will open. You will see any files or folders already attached to the task, as well as a list of the top-level folders in Document Manager for the current workspace. Browse to the folder or document that you want to attach to this item (as you click each folder, it will show you the next level down). Click the **Attach** link next to the appropriate item. Click **OK** to confirm your selection.

Creating reusable project templates

You may save existing projects in Project Tracker as templates to use again for future projects. WorkZone will remember project tasks (in order) and their associated durations and dependencies. Templates are a great way to get your projects going quickly.

To save an existing project and its associated tasks as a template, select the workspace where the current project resides from the Workspaces drop-down list at the top left of the screen and select the **Project Tracker** link in the top navigation. Select the **Project List** link to see a list of all projects in the workspace. Click **Save as Template** next to the project that you wish to reuse. Enter a name for the new template. Click **OK**.

Once you have saved project templates, you can use them to create the tasks for new projects (from the top right of the **Add Project** page) or insert them into existing projects (via the **Add Task** page).

WorkZone will automatically copy the tasks from the template you have selected into the specified project and will return you to the Task List. You can then edit any of the tasks to adjust dates, durations, add/delete tasks, etc.

Editing/updating tasks

Administrators can update tasks in all projects, and Account Managers can update tasks in any project to which they have access. Uploaders, client users and partner users can only update tasks for which they are the responsible party (and for projects to which they have access).

Expanding/collapsing items

In the Task List (and Gantt chart, if enabled), click the "▶" next to a workspace, project or task to expand the item to the next level. Click the "▼" next to a project or task to collapse an item, hiding the items below it.


You can expand/collapse all projects and tasks by clicking ▶ **Expand all** or ▼ **Collapse all** at the bottom left of the screen. In the ALL WORKSPACES workspace, you can also select **Show projects level** to automatically expand each workspace one level to show each of its projects (equivalent to clicking the "▶" next to the name of each workspace).


View completed tasks


By default, when a task is marked as "Complete", it is hidden from view in the Task List (so that you can focus on the tasks that need to be completed). To show completed tasks, click the checkbox next to **Show completed tasks** at the top of the page.

Caution symbols

Project Tracker can help provide guidance to workspaces, projects and tasks that require attention. Yellow or red caution symbols appear in the Status column of items that require attention. Click the "▶" symbol next to an item with a caution symbol to drill down to the late tasks that are causing the summary item to show the caution symbol.

A yellow caution symbol  will appear in the Status column next to a workspace, project or summary task when one of its subtasks is late, but the item itself (workspace, project or summary task) is not yet late.

A red caution symbol  will appear in the Status column next to a workspace, project or summary task when that item is itself late. [This occurs when the latest task within the item in question is late.]

When a task is not marked as complete by its End Date, a red exclamation point  will automatically show in the Status column for that task.

Auto notification of late tasks

WorkZone can send an automatic email notification when a task becomes late. When enabled, the email notification will be sent to the task's responsible parties, as well as the task creator.

To enable automatic notifications of late tasks for a specific workspace, select the workspace from the **switch workspace** drop-down menu. Click the **Setup** link in the top navigation. On the left menu, under **Settings – This Workspace**, click **Auto notification**. On the right side of the screen, under **Automatically send reminders to:**, click the checkboxes for the reminders you'd like to enable.

Filtering Tasks

Project Tracker provides handy filtering tools to give users easy access to useful subsets of their project tasks.

The **Filter this view** tool is located at the top right of the Task View and Gantt chart. Click **Filter this view** to expand the filtering menu. Users may select from six boxes that represent whose tasks (everyone's or my tasks) should be shown and what time period to show (all dates, late tasks, next 7 days). Click on the circle in the Filters tool that represents the view you would like to see. Project Tracker automatically filters the information to match

your selection.

If you want to customize the tasks you see in ways not presented on the initial Filters menu, click the **Show Advanced options** link at the top right of the Filter box. This will take you to the Advanced View, which allows you to filter tasks by any combination of three fields. Use the drop-down fields to select the fields on which you would like to filter and then the values for those fields.

Gantt Chart

A Gantt chart is a graphical representation (horizontal bar chart) of the start and end dates of the tasks within a project. It can be a useful tool to provide a visual overview of a project.

The Gantt chart is accessed by clicking on the **Gantt Chart** link at the top left of the Project Tracker screen.

The horizontal bar next to each task begins at the task's Start Date and ends at the task's End Date. To the right of the bar, the Responsible party and % Complete (if specified) are displayed.

If % Complete has been specified, the bar will have an internal black bar representing the portion that is complete.

The default view of the Gantt chart shows a monthly view of the project, for a six month period, beginning with the current month. You can switch to a shorter or longer timeframe for the project by selecting Weeks or Quarters from the Timescale drop-down list, located at the top middle of the screen.


Click on the black arrows to the left and right of the dates header to move to an earlier or later time period.


Time Tracking

WorkZone allows users to track the time they work on specific tasks. WorkZone keeps running totals of hours by task, user, project and workspace, and then makes this information available in a number of useful reports, which can be printed and exported (to Excel).

You must first enable the time tracking feature for it to appear within Project Tracker for all your workspaces. Select the **Setup** link at the top right of your screen. Select **ALL WORKSPACES** from the **switch workspace** drop-down menu at the top left of the screen. On the left menu, under **Global Settings**, click **Features to display**. Enable Time Tracking by selecting it for display.

Add time to a task

To add time to a single task, click the box to the left of that task in the time column (clock icon  at the top). To add time to multiple tasks at the same time, from the Task List view, click the check boxes to the left of the tasks for which you'd like to assign time. The selected tasks can span projects within a single workspace or can span workspaces in the ALL WORKSPACES view. After selecting the tasks, click the **Add Time** button in the title row. WorkZone will then open a new window with rows for the selected tasks, where you can specify the number of hours worked per task by responsible party.

Once time has been assigned to a task, a clock icon  will appear next to the task in the Task List. By putting your cursor over the clock icon, you can see how many hours have been accumulated to date for that task.

Create time reports

WorkZone can provide reports of time accumulated by person, workspace, project and task for a given time period. To create a time report, click on the **Reports** link in the top navigation. Under the Project Tracker section, you will see time tracking reports by Project and Responsible Parties. Once you have selected a report, you'll have the opportunity to refine the report by filtering it in many different ways.

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