Tracker Suite®

Project Tracker
User Guide

Automation Centre
software that works for you™

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Contents

A. Troubleshooting and Support 78

B: Smart Tags 80

Figures

1. Introduction

Welcome to the *Project Tracker User Guide*. Project Tracker is a powerful Web based application that is used to manage the projects in your organization. It is a valuable and powerful tool for organizing, accessing, and contributing to your company's project information database.

Project Tracker is one of the modules in the Tracker Suite application suite. Tracker Suite modules integrate with each other to exchange valuable information. Several of them will be referred in this manual.

The purpose of Project Tracker is to provide an easy-to-use platform for effective project management, empowering managers to take control of their projects. Project Tracker accomplishes this through:

- Providing a central, Web accessible repository for projects.

- Enabling managers to create tasks and milestones for projects, which can be monitored and tracked using Gantt charts, WBS structures and Task Boards

- Simplifying the resource management processes by providing an easy to use resource allocation module.

- Simplifying the creation and submission of project status reports.

- Providing a comprehensive document management environment to centralize and manage project information.

About this Guide

This manual covers specific features of the Project Tracker module and is intended to serve only as a companion guide to the *Tracker Suite Base Installation Guide* and the *Tracker Suite Base Configuration Guide*. It is assumed that the reader has a basic familiarity with Internet Explorer or other browser functionalities and related terminologies.

Refer to the *Tracker Suite Base Installation Guide* and the *Tracker Suite Base Configuration Guide* for:

- An overview of the Tracker Suite philosophy and how the various modules fit together.

- A review of Tracker Suite outlines views, tools, and functionality common to all Tracker Suite modules.

- Complete installation and configuration instructions including information on the Tracker Suite security model.

- A glossary of Tracker Suite terms.

This documentation has been designed to be read in either electronic or hardcopy format. If you are reading the electronic copy, the text has been cross-referenced, so when you are referred to a page number or section, if you click that text while pressing the CTRL button you will be taken to the information.

Notes, Tips and Comments

Within this manual, you will find the following icons with comments and key information about Project Tracker.

Notes	The Note icon designates useful side-comments and information.
Important	The Important icon designates crucial information or warnings that could have potentially serious consequences.
Tip	The Tip icon designates helpful troubleshooting or technical information, or perhaps an alternate shortcut.

Other Help Sources

In addition to this guide, more information about the Tracker Suite of products is located at the Tracker Suite website: http://www.TrackerSuite.NET

Users can visit our website for further information about our products, including sales literature, demos, and FAQ databases. For general information about our company, the Automation Centre, visit http://www.Acentre.com.

About Project Tracker

Project Tracker is the core component in the project management module of the Tracker Suite. Project Tracker tightly integrates and automates the key functions of a service business lifecycle.

Think of Project Tracker as a filing cabinet that contains all of the documentation for your organization's projects. It has high-level project definition documents, lists of team members, all data regarding a project, tasks, and meetings associated with projects. Project Tracker also contains a host of tools to access, organize, and contribute information to projects.

Project Tracker is designed to provide a company with organizational and individual planning and scheduling tools, documentation, process control, and quick access to current status reports. It provides a central base of operations for organizations, with a comprehensive toolset for managing teams as well as documenting and communicating deliverables. Project Tracker is an excellent tool for structuring, planning, and managing changes throughout an organization.

The Project Management Process in Project Tracker

The following is a process map of a typical project carried out in Project Tracker.
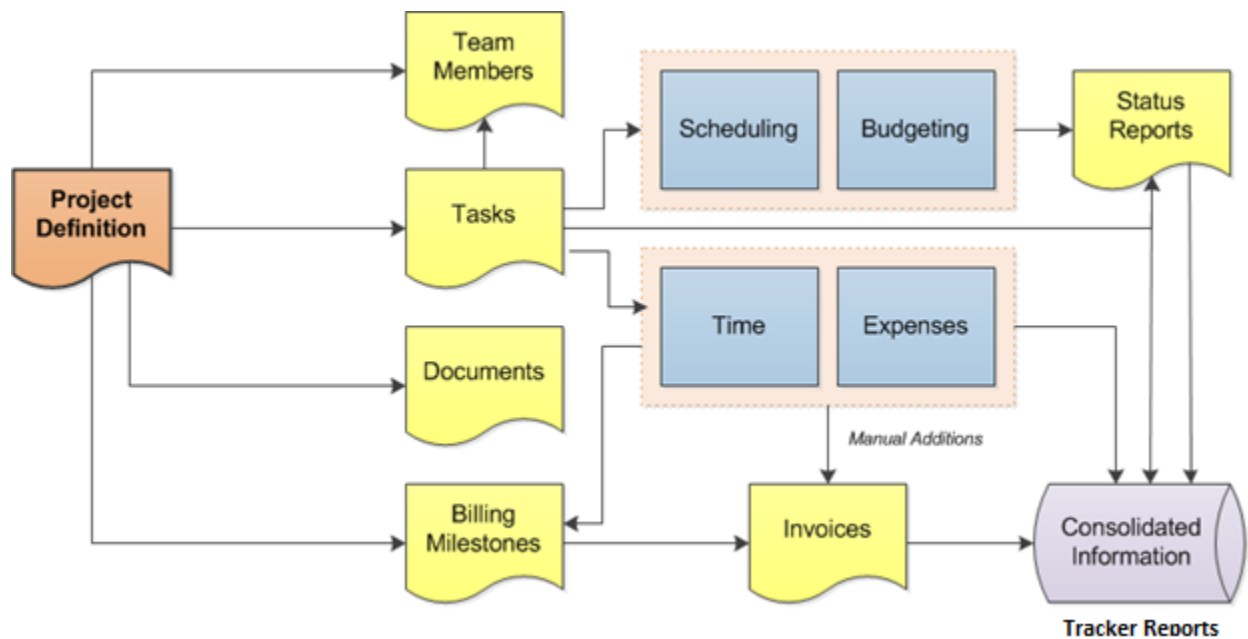
Figure 1 - Managing Projects in Project Tracker

Anatomy of a Project in Project Tracker

Projects in Project Tracker consist of different interacting pieces for tracking different aspects of the process. This is a brief introduction to the different document types.

- **Project Definition:** The Project Definition is the main document describing the project. It is where the high-level schedule and budget are set up. Most of the other documents discussed here can be accessed from the Project Definition form. When starting a new project, the first step will be creating the Project Definition.

- **Tasks:** Tasks represent individual work items in the project. They allow you to break down the schedule into more detail and assign hours to specific resources. Tasks can be arranged into a hierarchy referred to as the WBS (Work Breakdown Structure). Tasks can be managed via the Gantt chart view, Scheduler or the Task Board view

- **Status Reports:** Project managers and other users can submit status reports against projects. Status reports record the state of the project at a moment in time and allow the user to report any issues or delays the project might have. Furthermore, from the status report the user can update the project status and task information.

- **Documents:** Project documents serve two purposes. First, they provide an area where notes and information can be entered for the project. The form has a rich text area that allows the user to format the text much like in a word processing application. Second, the document serves as a container where files can be attached such as Microsoft Word or Excel files.

- **Issues:** Issues with the project can be logged at either the project level or the task level.

- **Risks:** Potential risks with the project can be logged at either the project level or the task level.

- **Billing Items:** As work on the project proceeds, time as well as expenses can be charged against the project and its tasks, through Tracker Suite modules for time and expense reporting, Time Tracker and Expense Tracker. These items can be used to generate invoices in Invoice Tracker

- **Team Members:** Team member documents contain important information including the business roles the team members serve, their cost and billing rates, and what functions (such as time reporting, purchase requests, etc.) they are allowed to utilize in their work on the project.

Typical Roles for Project Tracker

Personnel in your company may use Project Tracker for a variety of tasks. The table below lists some of the common uses of Project Tracker by various positions.

Role	Use Project Tracker to . . .
Employees	Monitor project schedules. Update and maintain task loads. Communicate project status to team members and managers. Share customer communications and documents.
Managers	Create project definitions, milestones, and tasks to manage projects. Approve project documentation. Set and modify baseline dates. Manage employees' task loads through allocations.
Accounting	Use profiled projects and tasks to create billable line items.
Human Resources	Monitor development between project teams. Verify that personnel and teams are properly allocated.
Executives	Monitor the status of projects using high-level schedules. Compare the task loads of different departments.

Table 1 - User Roles in Project Tracker

Standard Features

The following are standard features of Project Tracker:

- Comprehensive Project Definition Documents to store complete information.

- Tasks management through dependency and linking features.

- Resource management functionality including resource request workflow, planning, and reporting.

- Integration with Microsoft Project.

- Budget differentiation between billed and actual amounts.

- Auto percent complete option in the Project Definition.

- Ability to track individual efforts on a particular task.

- Task-based percent complete on project status reports.

- Direct Tracker Reporting accessibility.

- Optimized data validations.

- Ability to track issues and risks on projects and tasks

Integration with Other Modules

Project Tracker is one of the main applications of Tracker Suite. It interacts with other Tracker Suite applications to provide a robust environment to plan, schedule and execute projects. Following are the list of applications with which Project Tracker interacts.

- **Personnel Tracker:** An HR Planning tool that structures employee information and provides Web based accessibility to employee directory, phone list and company calendar. It also effectively automates HR processes such as leave tracking and vacation requests. Project Tracker gets the resources defined in Personnel Tracker so that these can be selected under various modules such as resource planning, project manager and sponsor declaration.

- **Time Tracker:** A Web timesheet system that streamlines time reporting. In filling out their timesheets, users select projects maintained in Project Tracker to charge the time against.

- **Expense Tracker:** An expense reporting system. In submitting expense reports, users select projects, which are maintained in Project Tracker to charge the expense against.

- **Purchase Tracker:** A procurement system. In submitting purchase requests, users select projects that are maintained in Project Tracker to make a purchase request for that project.

- **Invoice Tracker:** An invoicing system to roll up time, expenses, and fixed billing milestones against a project.

- **Tracker Reports:** A reporting engine that Project Tracker pushes project information to. Tracker Reports generates an array of reports including Project Portfolio and Project Milestones.

Project Tracker interacts with these other Tracker Suite as shown in Figure 2.
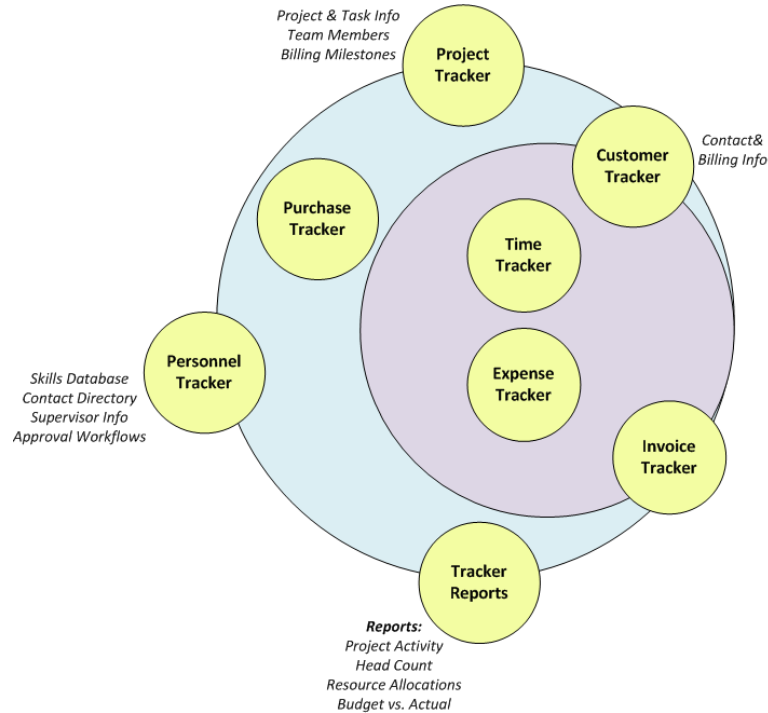
Figure 2 - Tracker Suite Process

Opening Project Tracker

To access Project Tracker, open Internet Explorer, or other supported browser, and enter the URL that corresponds to the location provided by your Tracker Administrator. By default, Tracker Suite is installed in the TrackerApps folder within the HTML directory on your Web server.

> *For example, a company using the domain www.Bizco.com might access Tracker Suite at http://Tracker.Bizco.com/TrackerApps/Default.htm*

You will be presented with the Tracker Desktop.   To open Project Tracker, click the Tracker icon in the lower left side of the screen to open the Navigator.
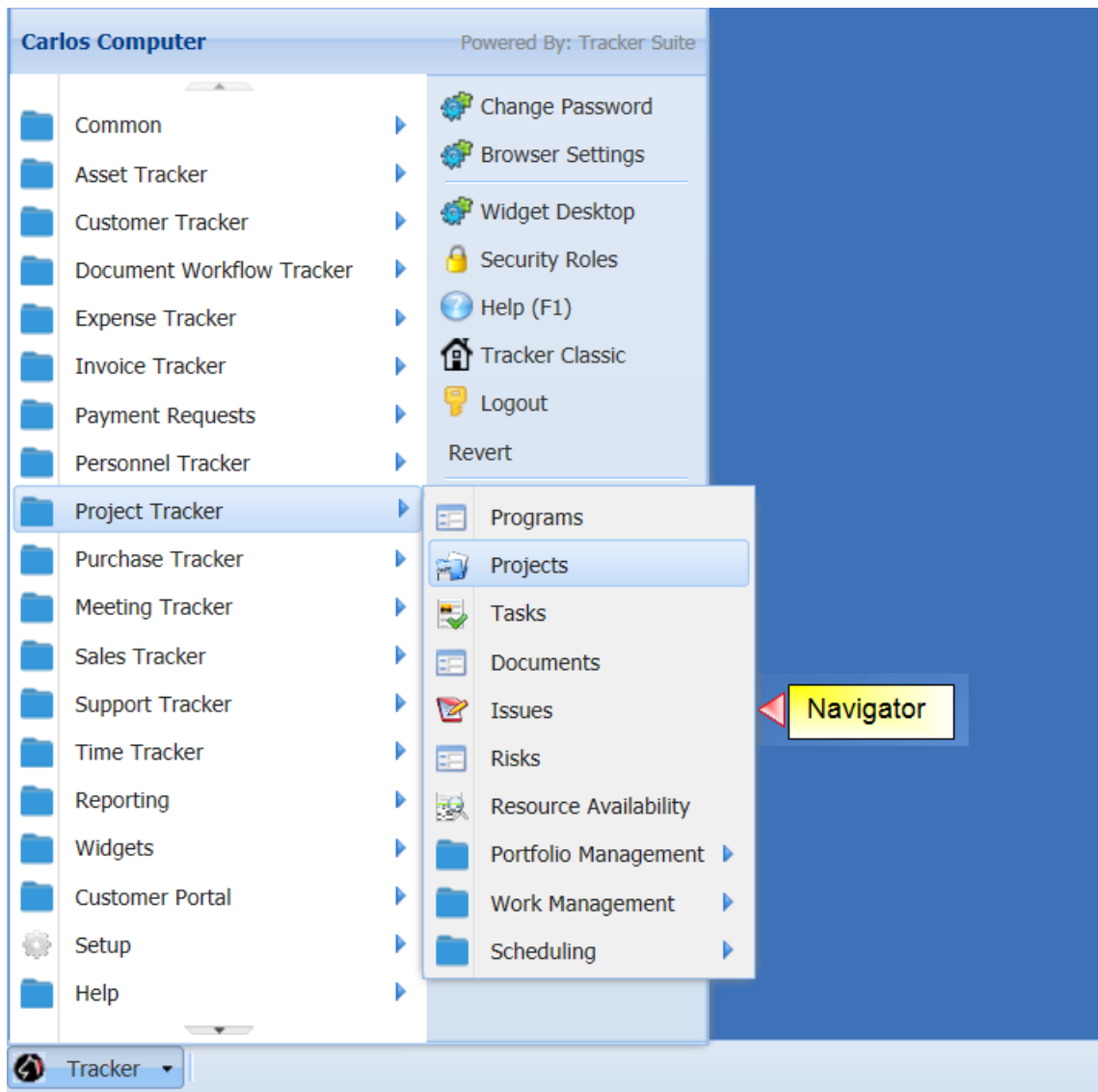
Figure 3 - Tracker Suite Desktop

Security

Security is a matter of both access to information and user privilege to actions, such as the creation and deletion of files.

Security in Tracker Suite is managed through roles.

- The roles assigned to the employee in their Person Document (Project Manager, General User, HR, etc.).

- The incidental roles assigned to the employee within Tracker Suite applications. For example, if the employee is on the team in a project, they have a Team Member role, if they are assigned a task, they have an Assignee role, and so on.

Within Tracker Suite Form Profiles, these roles are utilized to dictate the employee's ability to read, edit and delete forms.

A thorough discussion of role management and Form Profile security is available in the Tracker Suite Base Configuration Guide.

2. Project Planning

In this chapter we will examine the creation and planning of a project, establishing its schedule, milestones and tasks, and assigning resources.

> *In Tracker Suite, there is usually more than one way to accomplish any single action. The activities described in this chapter and those following may only describe one workflow from a particular view, but the activity may be available in other views or widgets as well, depending on the user's roles in Tracker Suite and in Project Tracker.*

Defining the Project

The first step in starting a new project is to create a Project Definition document. Once created, Project Tracker starts a portfolio that contains all documentation for this project. The Project Definition document contains all defining data and high-level schedules. It serves as the central reference point for all associated activities, documents, and tasks. The Project Definition document can be configured to include an approval process prior to becoming an active project.

> *The Project Definition document approvers are profiled under the Project Overview section of the project's definition by setting the Project Manager and Project Sponsor. There must be a Project Manager and Project Sponsor before a Project Definition can be saved or submitted. Both the approvers of the project and the required field list are fully configurable.*

Navigate to Project Tracker > Project Dashboard and click New > New Project in the top menu bar. This will open a new Project Definition form.

Figure 4 - Project Definition Form

> *An easy shortcut for creating a new project is simply to copy a previous initiative, using it as a template. This is discussed in more detail on page 73.*

From this page, you create the project and setup all necessary and pertinent information for the project to get started. Once the required fields have been filled out, the Project Definition can be saved by clicking either the Save & Close or the Save button. Save & Close will take you back to the previous view. The Save button will leave the project open on your screen. If you are using the approver cycle and the project is ready for review, click the Submit button from the tab menu of the definition document to send the document to the person listed as the project manager.

The Project Overview tab includes the following information:

- **Project Title:** The name of the project.

- **Project Code:** A unique identifier for the project. Depending on configuration, the project code may be generated automatically.

> *Once a project has been saved, the project title and code can no longer be changed, except by an Administrator by selecting Edit from the Projects view and clicking Change Project Name/Code*

- **Business Unit:** This drop down list allows for the business unit for the project to be set. For more information about business units, see the *Personnel Tracker User Guide.*

> *In some cases, it may be necessary to assign the same business unit to multiple projects. Instead of updating the business unit of each project individually, a user can select multiple projects in the Projects view, then click the Add/Edit OBS button to assign a business unit to the selected projects.*

- **Program:** Optionally select the program this project belongs to. For more information about programs, see page 63.

- **Program Manager:** This field will be populated when the program is selected.

- **Percent Complete:** This field represents an estimate of the percent of the project that has been completed. It is initially zero and is set when status reports are submitted.

- **Calculated Percent Complete:** The automatically calculated completion percentage of the project, based on configuration settings in the Project Setup document.

- **Project Manager:** The employee who is in charge of the project.

- **Project Sponsor:** The employee acting as the sponsor for the project.

- **Project Start:** The date when the project is scheduled to begin. It can be changed by clicking the 🗓 button to the right of the field.

- **Project Finish:** The date when the project is scheduled to be completed. It can be changed by clicking the 🗓 button to the right of the field.

- **Completion Date:** This field will be automatically populated with the date that the project status is set to Complete. It may also be set manually, if necessary, by clicking the 🗓 button to the right of the field.

- **Project Phase:** This field sets the phase the project is currently in. Clicking the ✓ button will bring up a list of all phases that are setup in Setup > Project Tracker > Project Setup > Phase Setup (see the *Tracker Suite Base Configuration Guide* for more information on setting up phases).

- **Project Status:** This field sets the current status of the project. Clicking the ✓ button will bring up a list of all statuses that are setup in Setup > Project Tracker > Project Setup > Status Setup (see the *Tracker Suite Base Configuration Guide* for more information on setting up statuses).

- **Project Type:** This field sets the type of project. Clicking the ✓ button will bring up a list of all profiled project types that are setup in Setup > Project Tracker > Project Setup > Project Types (see the *Tracker Suite Base Configuration Guide* for more information on setting up project types).

- **Project Priority:** This field sets the projects priority and is set by clicking the ✓ button and choosing one of the priorities that can be configured in Setup > Tools > Enumerates.

- **Project Category:** This field sets the category the project falls into. Clicking the ✓ button will bring up a list of all project categories that are setup and configured in Setup > Project Tracker > Project Setup > Project Categories (see the *Tracker Suite Base Configuration Guide* for more information on setting up project categories).

- **Approver Table:** The Approver Table button can be used to view who the project will be sent to when it is submitted for approval. This information cannot be edited directly, but it can be changed by selecting a different project manager or project sponsor, assuming the default workflow is used.

- **Project Description:** This is a text area that can be used to provide a more detailed description of the project.

  By default, this area is set for basic text entry. However, if you wish to leverage Rich Text Format options such as tables, images, embedded media and more, click the button on the far left of the toolbar, just underneath the "Project Description" field label, to enable Advanced options.

- **Health:** This is used to mark the overall health of the project.

- **Requires Status Report:** This will include/exclude the project from the list that is sent when status report reminders are sent.

> *Required fields are configured in Setup > Site Configuration > Form Profiles and any field can be set to be required or not based on a company's needs. Consult the Tracker Suite Base User and Installation Guide for more information.*

Display Properties

The Display Properties area allows you to select color highlighting and text formatting options for the project. When it appears in other views, such

as the All Projects view, these formatting options will help set it apart from other projects for easier identification.

Adding Team Members

The Team tab of the Project Definition document contains all information necessary to specify the people that will be in charge of completing the tasks associated with the project. Groups configured in Personnel Tracker or individual employees can be added to the project.

Figure 5 - Project Definition Team Tab

To add a new team member, click New > Add Team Member. This will bring up a dialog from which you may select an employee by clicking the ⌄ button and setting the role the person will assume for the project.

Figure 6 - Team Member Profile

If the project should be open to everyone in the organization, check the "Give Access to Everyone" checkbox.

To add multiple team members, click New > Add Multiple Team Members. This will open a new window with a list of personnel from which you may select multiple employees by holding the CTRL button and clicking the team members you wish to add. This list is searchable, and can also be filtered by location, manager and business unit.

Removing a Team Member

To remove a team member, select the team members you wish to remove and click Edit > Delete.

Creating Project Budgets

Using Project Tracker, you can set up budgets at the beginning of a project, and combined with a module like Time Tracker, measure actuals against the project to estimate how close the project is to completion and detect overages.

Budgets can either be set up at the project level or the task level. Project level budgets are simple and quick to set up. Task level budgets take more work to set up, but they allow you to budget at a finer level, both by splitting the budget out to individual tasks and because it allows you budget by week or month, instead of just in lump sums.

Figure 7 - Budget Tab in the Project Definition

> The row labels described (Budgeted, Baseline, etc.) can
> be customized, so the terms you see there may be
> different. See the Project Tracker Administration section
> for more details.

The Budget tab includes the following columns.

- **Baseline:** Once the project budget is finalized, you can click the Set Baseline
  button just beneath the budget section to take a baseline snapshot of the budget.
  The budget at this point in time will become the current baseline.

- **Budgeted:** This shows the total project budget subdivided into labor hours,
  capital labor, non-capital labor, capital non-labor and non-capital non-labor, and
  income. **Planned:** This shows the total hours/costs as planned at the task
  assignment level.

- **Forecast:** Generally speaking, Forecast means estimated costs to complete the
  project from a given point in time. This is based on the knowledge of how much
  time has already been spent on the project. The values shown here are
  dependent on the configuration in project tracker setup document.

- **Committed:** Generally speaking, Committed means such costs that the
  management of an organization has a long-term responsibility to pay. For

example, this can include all Purchase Orders that are still pending for vendor payments. These calculations of Committed can be profiled and fine-tuned in the setup document.

- **Actual:** This shows all actual costs coming from time sheets, expense reports, purchase requests etc. These calculations of Actual can be profiled and fine-tuned in the setup document.

- **GL Actual:** This shows all payments that are entered in the ledger. This includes all invoices, expense reports, vendor payments, payment requests and so on.

- **Variance:** This shows the percentage difference between the budgeted hours and costs, and the actual hours and costs.

- **Set Baseline:** Clicking the Set Baseline button will copy the budget hours into the baseline. The baseline acts as a beginning reference point to gauge how much the budget changes over time.

- **Link to Project Cost Report by Account Code:** Clicking this link pulls up a project cost report for the project.

Drilling Down on Project Budgets

If the total in a column is hyperlinked, the user may click on the link to drill down on more information about the total and the items comprising it. This will take them to a specific filtered Tracker Report.

*Figure 8 - Project Budget Drill Down*

Project Level Budgeting

Budgeting at the project level is carried out within the Project Definition, on the Budget tab.

By default, the budget is broken down as the Labor (Capital and Non-Capital) and Non-Labor (Capital and Non-Capital). By clicking the Change View button, the budget view can be switched to Capital (Labor and Non-Labor) and Non-Capital (Labor and Non-Labor).

In this lower section, you can specify the budget period in Years (1 to 10) which would change the column span in the lower table. In the lower table, you can budget the hours (monthly, in above example) and then select as many account codes as necessary and put the budgeted cost/income against them. Based on the type of account codes (Capital/Non-Capital/Income) and based on selected type in the table (Labor/Non-Labor/Income) the calculations are done and shown on the top area of the screen.

Budget Period in Years: [2 ▾]

[Add Row] [Hide Comments Column] [Import Budget] [Import Planned Data]

		Account Code	Account Name	Comments	Category	Type	Totals	Jun / 2...	Jul / 2...	Aug /...	Sep /...	Oct / 2...	Nov /...
		Hours:				**Hours:**	**2,100.00**	100.00	100.00	500.00	200.00	500.00	200.00
⬦	▯	9000100	GENERAL ACCOUNT RECEIV...		Income	Income	**16,000.00**	5,000.00	2,500.00	2,500.00	1,500.00	1,000.00	2,000.00
⬦	▯	5002000	BUILDING MECHANICAL		Capital		**3,520.00**	1,500.00	500.00	500.00	120.00	200.00	500.00
⬦	▯	6108500	SUPPLIES-OFFICE		Non-Capital		**2,250.00**	500.00	200.00	500.00	200.00	500.00	150.00
		Cost Totals:				**Cost Totals:**	**5,770.00**	**2,000.00**	**700.00**	**1,000.00**	**320.00**	**700.00**	**650.00**
		Income Totals:				**Income Totals:**	**16,000.00**	**5,000.00**	**2,500.00**	**2,500.00**	**1,500.00**	**1,000.00**	**2,000.00**

To remove an account code row, click the Remove icon on the far left of the row. To add a comment to the row, click the Comment icon.

Users can update this table by clicking the Import Planned Data, which will update the table based on the budget information in Project Tracker.

Remove	⬦
Comment	▯
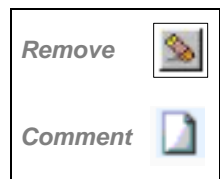
Users may also import a budget from an Excel spreadsheet, by clicking the Import Budget button. The Excel file should be in the below format.

Budget Amount	Account Code	Date
5000	16001	03/17/2017
1500	16003	03/17/2017
6000	16001	04/17/2017
2500	16003	04/17/2017
7000	16001	05/17/2017
3500	16003	05/17/2017

> *If you wish to import budget information from an Excel spreadsheet, there are the following requirements:*
> 1. *The Excel file must contain three columns: Budget Amount, Account Code, and Date.*
> 2. *The columns must be in that sequence , and the import routine will ignore the first line as the title row.*
> 3. *Imported data is NOT saved until you click the Save button on the project form.*

Task Level Budget Planning

Task level budgeting is done through task resource assignments. In the Schedule grid on the task document, you add your assignees and budget hours/dollars for the resources.

Figure 9 - Task Budget

How the entered data shows up in your project budget depends partially on the type of the resource (Employee Type on the person form). If the resource is not a fixed resource, the hours entered in the Hrs/Qty column will be added to the hours of the budget, and the Total Cost will be added to the labor section of the budget. If the resource is fixed, the quantity is not included in the hours and the cost shows up as non-labor. To determine if the cost is capital, non-capital, or income, you can select an account code on the Advanced tab of the task. If the selected account code is a capital account code, the budgeted costs will be capital, etc.

The process of creating your tasks and assigning resources will be described in more detail later in this guide. For more information about configuring your account codes, see the *Tracker Suite Base Configuration Guide.*

Baselining a Project

Baselining a project takes a snapshot of the critical schedule and budget information for the project at a point in time. This allows you to adjust the budget and schedule as circumstances change, but track how far it has moved from the original plan. To baseline a project, go to the Budget tab of the Project Definition.

Make sure your budget numbers and start and end dates are correct, then click the "Click to Set" link in the Baseline column. You will see that the baseline dates now show the current start and end dates and the baseline numbers will match the budgeted numbers. You can now change your project dates and budget and the baseline will retain its copy.

> *Only the most recent baseline is saved for the project, so if you baseline the project again, your original baseline will be overwritten.*

Managing Milestones

Project milestones are the highest level task scheduling in the project. A set of milestone templates are configured for the system. Then, for each project, the appropriate milestones are created and scheduled. The initial configuration will be covered later in this guide, but we will describe here how to manage milestones for particular project.

First, go to the Tasks tab of the Project Definition and click on the icon highlighted below:

Figure 10 - Project Milestones

Milestones that have already been created have dates listed. The rows that show no data are milestone templates that are available, but have not yet been created for this project.

Create Milestones

To create milestones, check the checkboxes next to the name and click Create Selected Milestones. If the milestone already exists, it will be skipped when creating the tasks. When the milestones are created, it is possible to configure the initial duration of the task and how many days after the start the project this milestone should start, so the initial dates might vary between the tasks. If the checkbox next to "Send notification to assignees on milestone task creation" is checked, as a milestone task is created, an email will be sent to the people or groups listed in the project's Team tab.

> *When you click the Create Selected Milestones button, the Project Definition document will automatically be saved.*

Opening Milestones

Click the name of a milestone to open the task form. Since the milestones are full tasks as well, you can do all the normal task operations, such as assigning resources, within the task form.

Change Start and End Dates

You can change the start and end dates of the milestones directly from the view. Click the date you want to change and a calendar control will open. Select the new date and click OK and the date will be updated.

Mark Milestones Complete

To mark a milestone complete, click the appropriate Mark Complete link in the view. You will again be prompted for a date. Select the date and hit OK and the task will be marked complete with the selected date as the Actual Date (the date the task was completed). Instead of the Mark Complete link, you will now see the Actual Date in the view for this task. You can adjust the actual date by clicking it and selecting a new date.

Scheduling Work

Tasks in a project are typically managed in the Work Breakdown Structure (WBS for short). The WBS is a hierarchy of tasks. Resourcing and scheduling are set up in the bottom level task and the parent tasks calculate their dates and budgets based on their subtasks.

The WBS Gantt View of a project can be opened one of two ways:

- In the Projects view, click the Tasks link in the Edit WBS column.

- In the Project Definition document, go to the Tasks tab.

> *Changes to the project WBS do not take effect until it is saved. If you try to navigate away from the WBS view or open a task after changes have been made, you will be prompted to save your changes. At any other time, you can save your changes by pressing Save WBS.*

Defining Tasks

To create a task, from the Tasks tab in the Project Definition document, click the New Task button to open a Task Definition document.

Figure 11 - Task Definition Document

- **Task Name**: Brief description of the task

- **Task Code:** A unique identifier for the task. Depending on configuration, the task code may be calculated automatically.

- **Status:** This drop down list allows the user to set the current status of the task to keep everyone updated on the tasks status. If the status is set to Completed, the actual date will automatically be set to the current date and the percent complete will be set to 100.

- **Constraint type:** This field takes one of two values, As Soon As Possible or Must Start On. As Soon As Possible is typically used with task linking (see page 31). The task start date will be set to the day after the end date of the predecessor or the project start date if no predecessor exists

- **Task Type:** Using this field to mark if the task is a Labor or Fixed Cost type. For fixed cost type you can specify the fixed cost amount on the first tab itself.

- **Start Date:** The date the task is scheduled to begin. This field may not be directly editable depending on the constraint type selected. See the description of constraint type below for more details.

- **End Date:** The date the task is scheduled to finish. This field may not be directly editable depending on the constraint type selected. See the description of constraint type below for more details.

- **Duration:** The length of the task in days, not counting days in the weekend. This will be automatically calculated from the start and end days if the constraint type is set to Must Start On.

- **Percent Complete:** This keeps track of progress on the task as it moves through the different phases. This value is manually entered except for when the status is set to Complete, at which point the value is set to 100.

- **Resource Schedule:** These values are set when either a group or person is assigned to the task. Refer to Figure 9 in this document for an example of resource assignment and the Assigning Resources section of this document for detailed instructions

- **Description:** This text area provides a place for you to enter the details about the task

- **Task Owner:** Use this field to designate the individual who is ultimately responsible for the task.

- **Task Priority:** This Web page dialog allows the user to set the task priority level. Priority levels are defined and configured in Setup > Project Tracker > Task Setup > Task Priority.

- **Task Phase:** This field sets the task current phase. Phases are created and configured in Setup > Project Tracker > Task Setup > Task Phase.

- **Task Category:** This field sets the category the task will fall into. The category can be useful when filtering the task view.

- **Account Code:** You can optionally select an account code here and time charged against the task can be charged to that account code as well.

- **Budget Category:** The budget category (capital, non-capital, or income) for time charged against this task. This field is set automatically when the account code is selected and cannot be directly modified.

- **Budget Subcat:** The budget subcategory for time charged against this task. This field is set automatically when the account code is selected and cannot be directly modified.

- **No of Occurrences:** This is a method to create recurring tasks. This option allows user to define a group of tasks that are recurring in project life cycle e.g. Monthly meetings

- **Days Between Occurrences:** Allows an interval between recurring tasks and parent task

- **Include Weekends:** If selected, this designates that weekends will be included in the recurring task

- **Actual Date:** This field stores the date the task was completed. The date may be changed by clicking the calendar button and selecting the date on which the task was completed or by setting the status to Completed.

- **This Task Is Milestone:** If you created the task from a milestone template then the task will automatically have this checkbox checked. This checkbox is not editable.

- **Display Properties:** The Display Properties area allows you to select color highlighting and text formatting options for the task. When it appears in other views, such as the All Tasks view, these formatting options will help set it apart from other tasks for easier identification.

- **Status:** The Status tab on the task allows for a Task Status form to be created. From this form, you can update the below fields:

- **Task Status:** This field contains profiled task status values

- **Overview:** This field gives you a place to include some brief notes about the current status of the task.

- **Status As Of:** This date field can be used to record when the task overview status was changed. To change or set this value, type in a date or use the 📅 calendar button to choose the date.

- **Percent Complete:** A user can enter a percent complete of the task

- **Comments:** This field gives you a place to provide more detailed information about the status of the task

- **Charge Time?**: If selected, and Hours entered, will log entries on the users Time Sheet (only enabled if using Time Tracker)

Assigning Resources

The resourcing component of Project Tracker allows managers to monitor all aspects of resource allocation, including:

- Which employees are assigned to which tasks?

- The amount of unallocated time an employee has for a given time period (week or month).

- The anticipated cost of a task or project, based on allocated time and employee cost rates.

The resources for a particular task are allocated on the Scheduling grid on the Task form. Groups can be configured in Personnel Tracker, which allows employees to be grouped with similar employees (such as IT, Product Development, etc.) for simpler organizational management. Groups are discussed in detail in the *Personnel Tracker User Guide*, this section will focus solely on individual resources.

Figure 12 - Resources Assigned to a Task

All resources are initially set up in Personnel Tracker as Person documents. For details on creating new Person documents, see the *Personnel Tracker User Guide*. Resources are of one of two types: regular or fixed. In the Person document, if the Employee Type is set to anything other than Fixed (as opposed to Full Time, Part Time, etc.), the resource is an employee and is allocated by hours. If the Employee Type is Fixed, the resource is a fixed resource and it is allocated by dollars. In either case, the cost rate is pulled from the Person document.

Resources may be added individually or in multiples.

Adding Individual Resources

Individual resources are added by clicking the Add Row button and then selecting their names with the ⊕ button. A resource is deleted by pressing the ⊖ button in the appropriate row. Click the 🗋 icon if you want to add some comments for an assignment. Once you have added the comments the icon changes to 🗎.

The following fields are available on this tab:

- **Resource:** The name of the selected resource.

- **Hrs/Qty:** The hours the employee will work on this task, or if a fixed resource, the quantity assigned.

- **Type:** The employee type as specified in the resource's Person document.

- **Edit Rate:** Leave unchecked to use the cost rate pulled from the resource's Person document or check to edit it manually for this task.

- **Cost Rate:** The dollar cost of the resource per hour or unit. This field is only editable if Edit Rate is checked.

- **Total Cost:** The total cost of the assigned resource for this task.

- **Unit:** "$" if the resource is fixed, "hrs" otherwise.

- **Edit Hrs/Cost:** Check this box to manually distribute the hours across the time periods in the following columns.

Assigning Team Members

If you have used the Team function for your Project, you can assign tasks to the whole team by clicking the Add Team Members button on the task assignees page.

Viewing Availability

To see the availability of resources from the Task document, click on the ( ) icon; you can then select which resources are displayed using the filters at the top.

Figure 13 - Resource Availability View (Resources by Week)

A manager may want to see a resource's current schedule with respect to the number and type of tasks allocated to the resource. Managers can easily drill down to see the tasks their resources are assigned to by clicking the hyperlink Hrs on open Tasks.

Fixed-type resources can be allocated, but they do not display in the availability table.

If you see 0 availability showing up in all the time periods for an employee and they have not been allocated to any task already, make sure Capacity Hrs per Day is set in their Person document in Personnel Tracker. For more details concerning configuring resources in Personnel Tracker, see the Personnel Tracker User Guide.

Once Hrs/Qty has been set for a resource, the hours or dollars are distributed automatically to the time units between the task start and end dates. If you wish to manually distribute the resource allocation, check Edit Hrs/Cost and enter the values as desired. If the total of the values entered for the resource differ from what is entered in the Hrs/Qty field, the Hrs/Qty field will be automatically adjusted. If you allocate a resource outside the date range of the task, you will be warned, but not prevented from saving the allocation.

If a task has an allocation with "Edit Hrs/Qty" checked, the task cannot be linked to another task. See the next section for a further discussion of task linking.

Shifting Resources

The last action available is the Shift Hours button. This button can be used to shift an allocation a certain number of time units (months or weeks) forward or backward. Simply click the button and the dialog below will be displayed. Select whether you will be shifting the allocation to the future or past. Enter the appropriate number of units, and press OK.

Shifting a resource has two effects: it shifts the allocated hours into the future or past as specified, and it shifts the task's start and end dates the same amount. Linked tasks will also have their dates updated if necessary.

Creating Tasks from Templates

Instead of creating a new Task Definition from scratch, the user may opt instead to create a task from a template, by clicking the More Options>Add Task Template button

in the top menu. This will create a preconfigured task that may include a description, duration, even assignees. This new task may be edited as needed.

The configuration of these templates is covered in the *Tracker Suite Base Configuration Guide*.

Scheduling Tasks

Within the WBS Gantt view, you can use the various arrow buttons (⬅, ➡, ⬆, and ⬇) to re-order and organize tasks.
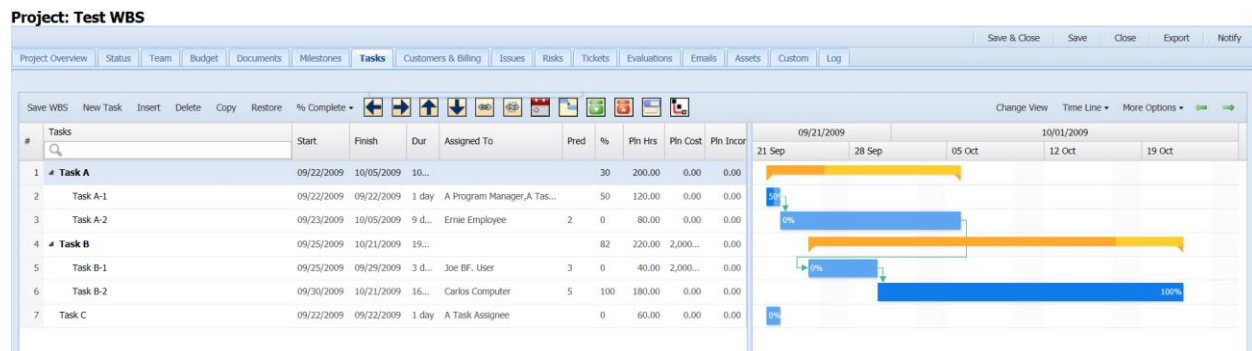
Figure 14 - WBS View

To select a task, click anywhere in the task's row except the task's name (clicking the name will open the task document). Multiple tasks can be selected by holding down the CTRL or Shift key.

The up and down buttons move where the tasks appear in the list. This is an organizational change, and the task start and end dates are not affected. For instance, if Task A is moved below Task B, Task A will not necessarily start or end after Task B.

The right and left buttons are used to indent and out-dent tasks. By default, all tasks are at the highest WBS level. If you select one or more tasks and click the right arrow, those tasks are indented one place to the right and the task above the selected tasks that is one WBS level above the new level of the selected tasks becomes a summary task. When a task becomes a summary task, the following occurs:

- The start date of the task is set to the earliest start date of all its subtasks.

- The end date of the task is set to the latest end date of all its subtasks.

- The "Pln Hrs" column displays the total allocated hours for all the subtasks.

- The "Pln Cost" column displays the sum of the allocated costs for all the subtasks

- The "Pln Income" column displays the sum of the budgeted/planned income for all the subtasks.

Linking Tasks

In addition to organizing the tasks using summary tasks, tasks can be linked together. When a task is linked to a preceding task, its start date is tied to the preceding task's end date. If the end date of the predecessor changes, the start date of the linked task is automatically updated. The duration of the linked task is also maintained, so the end date is as well.

> *For a task to be linked to another task, its constraint type must be set to "As soon as possible." If the constraint type is not already set to "As soon as possible," it will be changed as soon as the task is linked.*

For instance, suppose you have two tasks, with one task starting on March 3rd and ending on March 4th, and the other starting on March 17th and ending on March 18th. If you link the second task to the first task, its start and end dates will adjust to March 5th and 6th, respectively.

> *When a task's dates are shifted, its duration stays the same. It is important to note that when the duration is calculated, weekend days are excluded. So if a task has a duration of two days and it is adjusted to start on a Friday, the task will be scheduled to end on the following Monday.*

To link the tasks, select the two tasks and click the Link button (🔗). The task listed second in the WBS view will be marked as the successor to the other task, so if you want the relationship to go the other direction, move the tasks first with the ⬆ and ⬇ buttons. To unlink the tasks, select either task and click the Unlink button (🔗).

Copying Tasks

A task can be copied within a project or to another project by selecting it within the Gantt view, and then clicking the Copy button from the top menu. A dialog window will appear, where you can select which project you would like to copy the task to.

Scheduler

Tasks can also be managed utilizing the Scheduler tool on the Project Tracker navigation menu. Tasks can be filtered on various options like date range, task assignees, project, program, department, project managers etc. Task scheduler also provides option to group tasks by:

- Person/Project
- Project/Person
- Project Manager/Project/Person
- Person Department/Person/Project
- Person Manager/Person/Project
- Person Supervisor/Person/Project
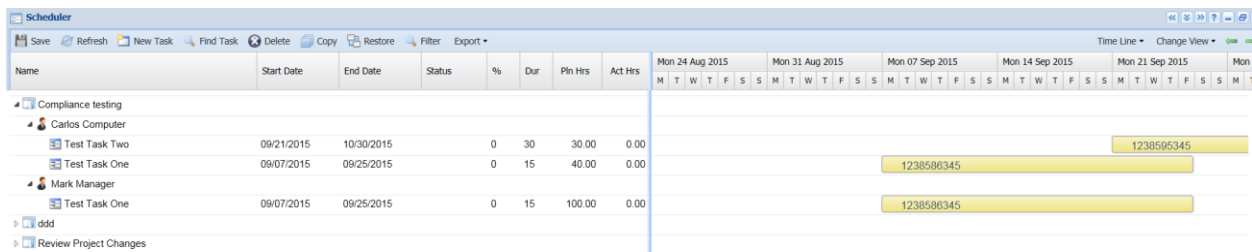
Importing/Exporting Tasks with Microsoft Project

Tasks lists can be imported from and exported to Microsoft Project from the WBS view. To import, click on the More Options>Import button, select your MSP file, and click Open. You will be prompted to map the resources listed in the MSP file to the users listed in Personnel Tracker.
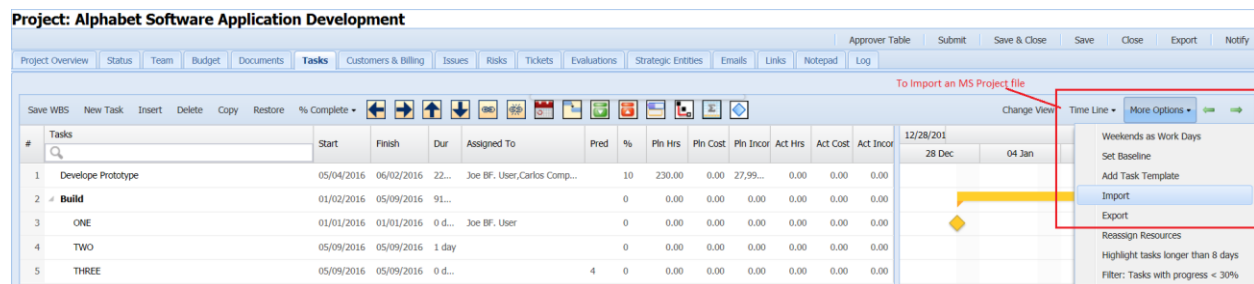
Figure 15 - Mapping Resources from MSP to Project Tracker

It will then update existing tasks if there is a match or create new ones from the imported file and delete the ones that have been deleted from the Microsoft Project file. The settings for importing tasks from Microsoft Project are discussed in the *Tracker Suite Base Configuration Guide.*

To export the task list, click the Export button. A Microsoft Project window will be opened and any necessary changes to the tasks can be made before saving the file.

Defining Risks

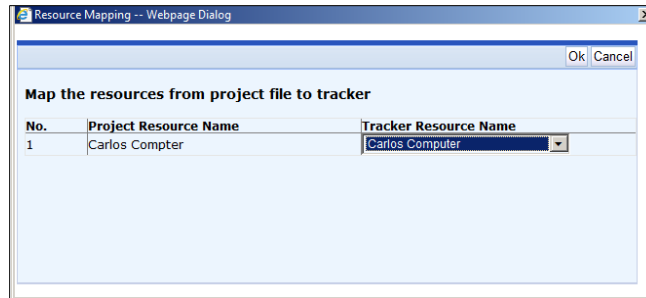One of the most important aspects of planning a project is also determining potential risks (such as the project running off-schedule, or if a crucial deliverable is missed), there impact, and making plans to address them.

> ***Risks vs. Issues****: As well as defining Risks at the Project or Task level, organizations may define Issues in the same fashion. The difference between Risks and Issues is that Risks are complications that are known possibilities, typically charted in the planning phase of the project, while Issues are complications that arise during the project.*

In Project Tracker, risks can be defined both at the Project and Task level. This section will focus on defining risks at the Project level.

Risks for the project are defined in the Risks tab of the Project Definition document. This is where all risks for a project appear. Because Risks can potentially exist on many different forms the security profile is inherited by the parent form.
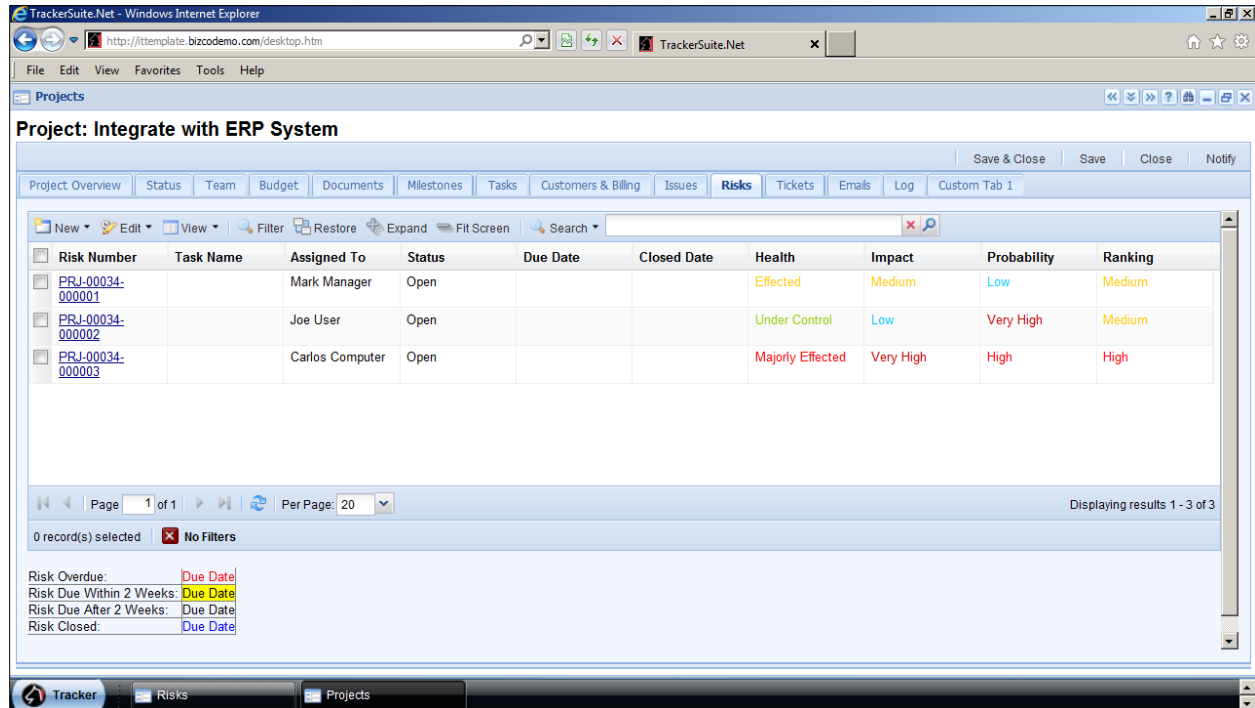
Figure 16 - Risk Tab in the Project Definition Document

To delete a Risk, check the box next to the Risk you wish to remove, then click the Delete button.   To create a new Risk for the Project or Task, click New > Risk for Project or New > Risk for Task. A new Risk form will open.

Figure 17 - Reporting a Risk

- **Risk Number:** A number/code that should be unique to its parent form.

- **Status:** The status of the Issue. This is only a keyword.

- **Health:** Overall risk health.

- **Impact:** The impact of the Risk.

- **Probability:** The probability of the risk occurring.

- **Originator:** Who created/requested the creation of the risk.

- **Assigned To:** Who the risk is assigned to.

- **Due Date:** Expected resolution date.

- **Closed Date:** The date the risk was closed. This field is used to signify that the risk is actually closed not Status.

- **Calculated Rank:** Based on the numeric values of Health + Impact + Probability / 3.

- **Risk:** A field to explain the potential risk.

- **Actions/Comments:** A field to explain the actions taken to prevent or handle the risk.

- **Notes:** A field to explain the resolution to the risk.

3. Project Tracking and Execution

In this chapter we will look at the typical activities of an ongoing project, including task management and updates, issue management and document management.

Managing Tasks

There are several ways to update tasks and their status.

1. From the Task Gantt views tasks may be updated in-line.

2. From the Tasks view (available from the Navigator under Project Tracker > Tasks), multiple tasks may be marked complete simultaneously. Select the tasks that are completed, and click Edit > Mark Complete from the top menu.

3. From the Task Board view

4. From within the Task form itself. Open the task from one of the Project Tracker desktop tools, such as the "My Tasks" widget.

5. From the User Dashboard

Interactive Gantt Charts

The WBS Task Gantt is the default view available under the Tasks tab on the currently open project. To change this, you can click on Change View button and then choose

Resource Gantt Chart. Once you press OK, the view will refresh to show the Gantt Chart.

In the WBS Gantt Chart view, the total duration of summary tasks is presented by a solid blue bar, which incrementally turns yellow as progress on the summary task is recorded. Sub tasks are presented by empty, blue-bordered boxes that fill in as work on the task is reported. Links between tasks are illustrated by blue connecting arrows.
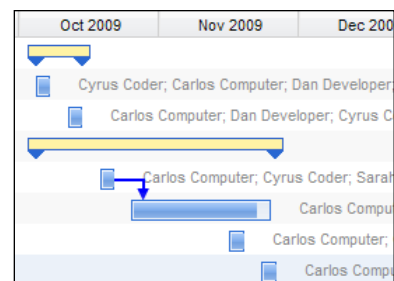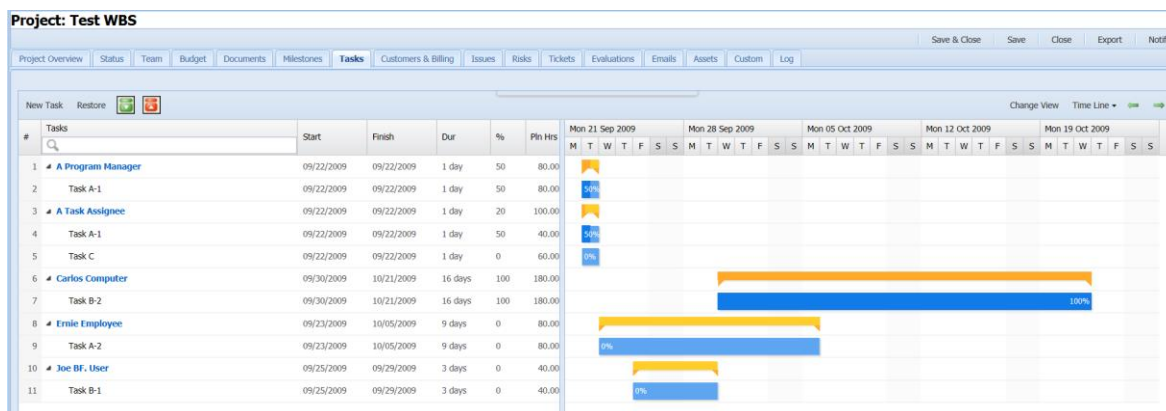
Figure 18 - Gantt by Resource

The Gantt by Resource view provides a similar perspective of workloads, based on assignees rather than tasks. In this view, the total length of an assignee's commitment is represented by a solid blue line.

These Gantt Chart views are interactive, allowing tasks and workloads to be updated within the view.

- To change the start and end date of the task, while keeping its duration, hover the mouse over the workload, until the icon changes to overlapping, perpendicular double-sided arrows. Two circles will also appear at the start and end of the workload. Click the workload, which can then be moved left or right. A hover box will appear, illustrating the new start and end date of the task as it is moved.

- To change the start or end date of the task, as well as its duration, hover the mouse over the left or ride side of the bar. The icon will change to a horizontal, double sided arrow. Two circles will also appear at the start and end of the workload. Drag the side of the workload to the left or right to alter the duration of the task and its start/ end date.

- These views also allow information to be edited in-line by double-clicking the data.

    o In the WBS Gantt chart, in the Summary Task rows, the % Done column can be edited.

    o In the Task rows of either the WBS Gantt or Gantt by Resource view, the Start / Finish dates, Duration, Assignees and % Done columns can be edited. If a date or duration is updated, a red checkmark will appear in the upper left corner of the other dates that are affected by the change.
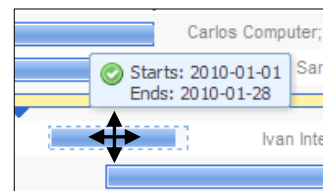
Task Board View

Tasks can also be managed by using the Task Board view; select this view from the Task tab on the Project Definition form and then select (**Change View>Task Board**). The status of the tasks can be quickly updated using Drop and Drag – simply click and move the task into the appropriate status. Save & Close the Task Board when complete.
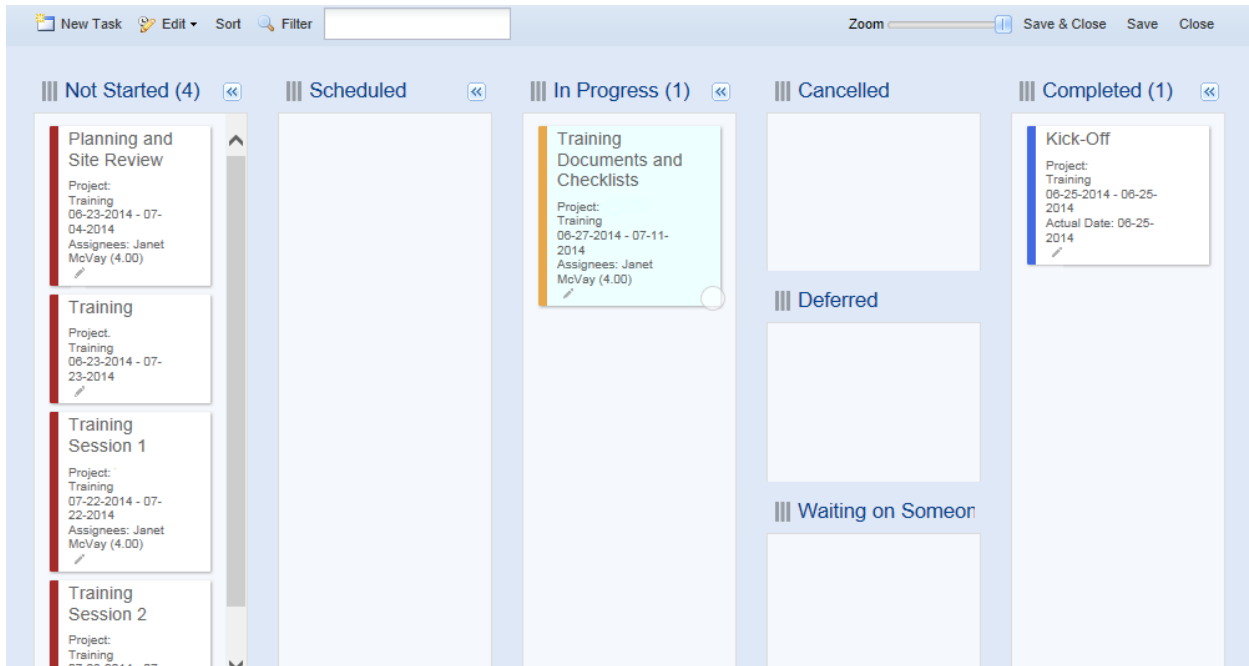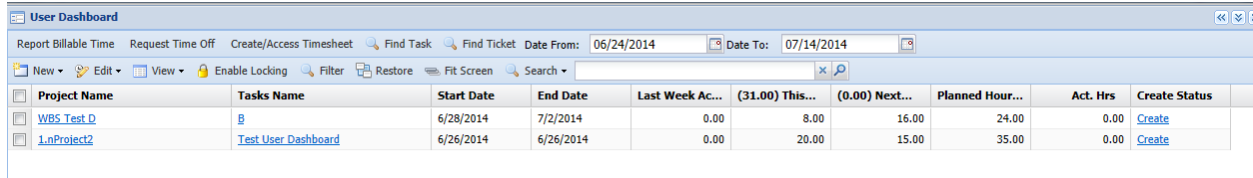
Some features of the Task Board are:

- Drag & Drop tasks between various status pans to update their status like In Progress, Scheduled and Completed etc.
- Ability to edit an existing tasks
- Adding new tasks on the fly
- Saving multiple private views with the functionality to update/delete any of those private views

User Dashboard

Tasks can also be managed via the User Dashboard **(Project Tracker>User Dashboard)** where a user can see his All/Open/Past Due tasks. Users can also see a breakdown of planned and actual hours for last week and next weeks, can quickly create a status report and, if Time Tracker is implemented, can charge time against tasks.

Project Name	Tasks Name	Start Date	End Date	Last Week Ac...	(31.00) This...	(0.00) Next...	Planned Hour...	Act. Hrs	Create Status
WBS Test D	B	6/28/2014	7/2/2014	0.00	8.00	16.00	24.00	0.00	Create
1.nProject2	Test User Dashboard	6/26/2014	6/26/2014	0.00	20.00	15.00	35.00	0.00	Create

Other Views

As well as the default and Gantt Chart views, you may also leverage other views by clicking the Change View button. For example, it can show number of planned hours by resource or planned costs by Account Codes, and so on. When a user clicks the Change View button at the top of the page, it opens a popup window showing all the available formats.

Other available views include:

- **Summary by Account Codes:** This will show summary by GL Account Codes. The summary shows the Actual Hours, Costs and Income along with the planned values.

- **Earned Value Report:** This will show earned value calculations based on baseline costs and actual costs.

- **Task Calendar:** This will show a calendar formatted view of Tasks.

- **Cost Report by Account Codes:** This will show a detailed summary by Budget Categories and Account Codes with the option to drill down to the associated tasks. This view shows just the various costs associated with the WBS entries (not the hours and income).

- **Cost Report by WBS:** This will show a detailed summary by WBS structure. This view shows just the various costs associated with the WBS entries (not the hours and income).

The Task Dashboard

The Task Dashboard can be accessed from the Navigator by clicking Project Tracker > Tasks.

Figure 19 - Task Dashboard

The Task Dashboard provides access to all tasks defined in Project Tracker in a comprehensive, configurable view that can be categorized, sorted and filtered as the user needs. The Task Dashboard view also allows users to:

- Update the status, start and end dates of tasks in-line from this dashboard, without having to open the Task Definition.

- Update the Display Properties (text color, background color and font style) for multiple tasks simultaneously, by clicking Edit > Update Display Properties.

> *Remember, there is almost always more than one way to do things in Tracker Suite. As well as the Task Dashboard, users can also utilize Tracker Suite Desktop Widgets to manage and track their tasks.*

Task Status Notes

The Task Definition document includes a Status tab for storing status updates.

In order to delete a Task Status simply click on the checkbox and click Edit > Delete Status. To edit a Task Status simply double-click on the row.

To add a status update to a task, click New > Status to open a new status note form.

Figure 20 - Task Status Note

- **Submitted By:** By default, the user opening the new status note form will be designated as the submitter, but this can be changed.

- **Status As Of:** The date of the status note, by default the current date.

- **Task Status:** The status of the task, based on keywords configured in Project Setup.

- **Percent Complete:** How close the task is to completion.

- **Overview:** A brief summary of the status note.

- **Comments:** In this area the user enters more information and details about the task's status.

Reporting Time from a Status Note

A user can charge time against a task as he or she creates a status note for it. After checking the Charge Time box, two new fields will appear for entering time against the task as well as whether the time is billable.

If the user has a time sheet for the current period, a new row will be added to it with the project, task and time charged. If the user does not have a current time sheet, a new one will be created and the time added to it.

Task Exception Reporting

Project Tracker provides functions for automated task exception reporting, sending emails to designated recipients, including assignees and Project Managers, about the status of tasks in the system. These functions can be triggered manually from the Task Dashboard, or set for automated mailing via a scheduled job. Jobs are discussed in detail in the *Tracker Base Configuration Guide*.

Figure 21 - Task Exception Report Sent to Project Manager

To generate an exception report from the Task Dashboard, click Edit > Send Exception Report or Edit > Send Exception Report To.

- Send Exception Report – This will send an exception report to all Project Managers and Assignees.

- Send Exception Report To – After clicking this button, you will be presented with a dialog box with possible recipients.

Automated task exception reports can be configured in the Project Tracker Setup document (see the *Tracker Suite Base Configuration Guide* for more information on configuring these reports).

Managing Resources

Project Tracker provides views and tools that organizations can leverage in managing their resources, to ensure that they are neither overloaded with work nor under-utilized.
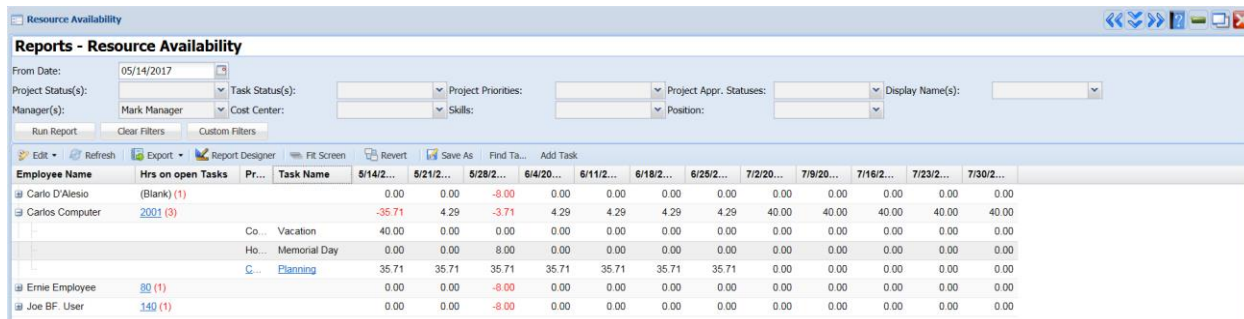
Figure 22 - Resource Availability View

The Resource Availability view can be accessed from the Navigator by clicking Project Tracker > Resource Availability. This view, similar to the one presented when assigning tasks, shows the number of hours on each resource's schedule, and offers an array of filters for zeroing in on groups or individual resources, including skills. Clicking on the Hrs on open Tasks link will show their scheduled work.

As well as filtering, this view also provides functions for creating a new task, as well as the ability to look up an existing task by clicking either the "New Task" or "Find Task".

The Resource vs. Available

Another useful tool is the Resource vs. Available widget, which provides a graph of resource workloads by position, over time.
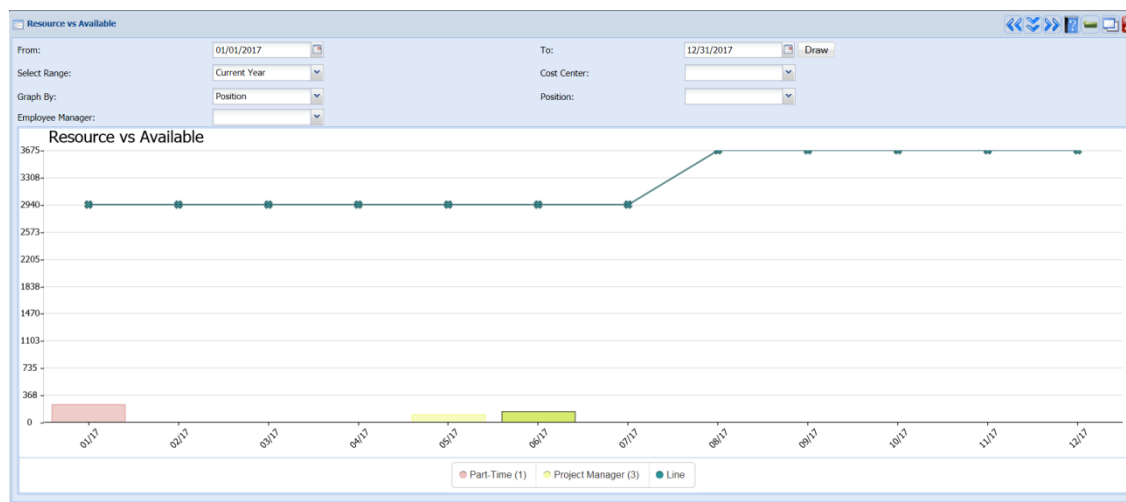
Figure 23 - Resource vs. Available Widget

This widget is typically available in the Tracker Desktop, but it may also be configured to appear in other desktops as well, including the Project Desktop.

Managing Documents

Documents provide a place to store additional information about a project. There are two main parts two a document, a rich text area and a list of attachments. The following section describes how to view, create, and manage documents.

Viewing Documents

Documents can be opened from one of two places, the Project Definition document or the documents view. The documents view is accessed by clicking the Documents button in the menu.
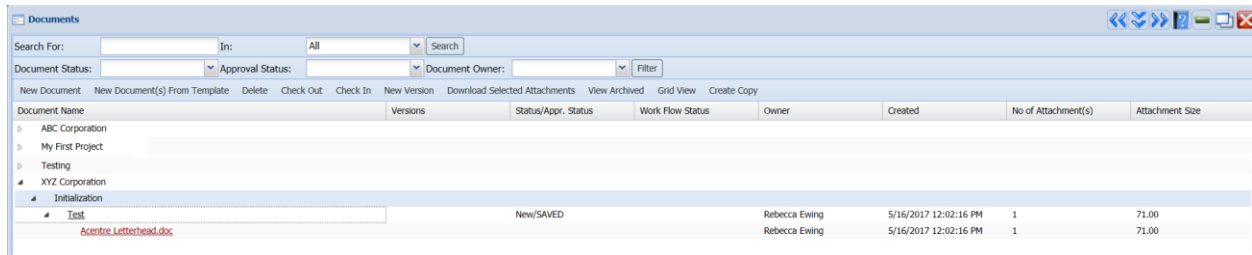
Figure 24 - Viewing Documents

Documents are grouped, first by project and then by category. Under individual documents, its attachments, if any, are listed. Documents and attachments can be opened by clicking on their names.

Documents can also be opened from the Project Desktop or Definition document. In the Project Documents widget of the Project Desktop and the Documents tab of the Project Definition document, you can see the same view discussed above, but limited to that particular project. Again, clicking the name of a document or attachment will open it.

By default, when a document is open it is set to read-only mode. In order to make changes, the user must click the Edit button, assuming that they have the role-based access to make edits.

Tracker Suite supports document check-in / check-out functions in either workflow. From the widget, the user simply clicks one of the lock/unlock symbols. In other views, the user clicks either the check-in or check-out button.

Creating Documents in Project Tracker

Documents can be created either from the Documents view or the Documents tab of the Project Definition document by clicking New > Document or New > Document from Template. Both buttons will create a new document, but the New Document from Template button opens up a window for template selection.

Multiple templates can be selected for simultaneous creation, by pressing the CTRL key while clicking on the categories you wish to create with the mouse, then clicking OK. Upon creation, the document(s) load default information from the template. For more information about creating templates, refer to the *Tracker Suite Base Configuration Guide* for more information. The Document Overview tab contains all of the core information for the document. The tab is divided into three sections, some metadata fields, a rich text area, and a list of attachments.
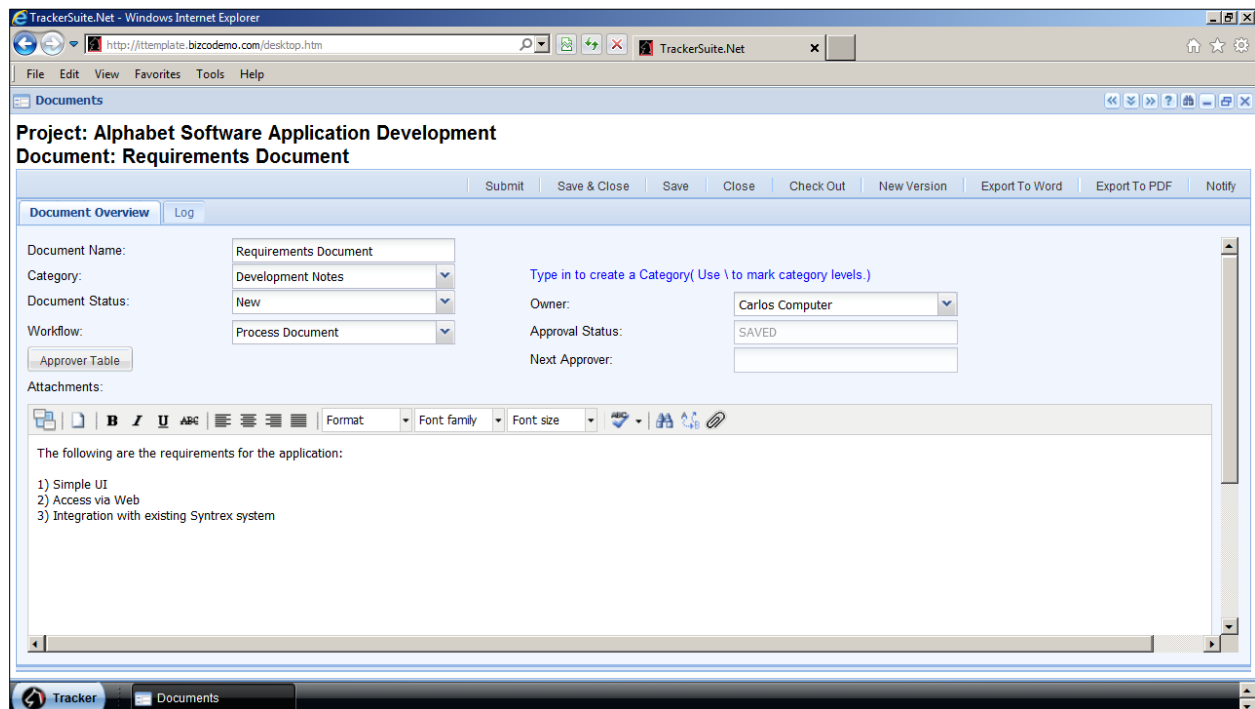
Figure 25 - Document Overview

The Document Overview tab includes the following fields:

- **Document Name:** This is the main identifier of the document. This field is required.

- **Project:** This is the project that the document is associated with. Every document must be associated with a project. If the document was created from within a Project Definition document, this field will default to that project's name. Once the document is saved, this field cannot be changed.

- **Category:** Documents are divided into various categories. Initially, you can only select from categories already defined in the system, using the drop down list. If you would like to associate the document with a new category, click the Add New Category link. The field will change from a drop down list to a text field. Once the document is saved, your new category will show up in the category drop down list for future documents. To switch back to the drop down list, click the View Category List link. Categories have the ability to create a folder-like structure. By creating the category Cat1\Cat2\Cat3 sub categories will be created.

> *If you create a new Document Category, it will only appear in the Document Category option list for documents created for that particular project. It will not be added to the core Document Category list, which is configured in the Setup area, as discussed in the Tracker Suite Base Configuration Guide.*

- **Document Status:** The status is not editable. It displays SAVED, Awaiting Approval, or Approved based on the approval status of document.

- **Workflow:** It is possible to configure multiple approval workflows for documents. Then, before the document is submitted for approval, the correct workflow can be selected from this list, and the document will be routed appropriately.

- **Owner:** The owner of the document. By default, the owner of the document is its creator, but ownership may be re-assigned.

- **Approval Status:** This un-editable field shows the status of the document, whether it is saved, awaiting approval, approved or disapproved.

The Approver Table button will open a window displaying the approval table for the document. The document must be saved before viewing the approval table.

Log Tab

The Log tab displays a log of all the changes to the document. It logs events whenever the document is created, saved, submitted for approval, approved, checked in, checked out, or versioned.

Managing Attachments

Once a document has been saved, attachments can be added or deleted. Attachments provide a way to associate documents of any type (Word, Excel, PDF, etc.) with the project. A copy of the file is uploaded to Tracker Suite, so other users can also access

it. To make changes to the attachments, click the Manage Attachments button. The File Manager dialog will appear:

To attach a new file, first click Browse, select the appropriate file, and then click Upload File. Once the file is uploaded, the window will refresh and display your file.

You will also see the file in the Document Attachments area of the document form:

In the File Manager, you can also delete existing attachments. Select the checkboxes next to the attachments you wish to remove and click Delete Selected Files. Attachments are opened by clicking the file name in either the File Manager window, or the Document Attachments area of the document form.

Document Details

The text area of the document form is a Rich Text field that supports a variety of text formatting options and tools including a spell checker. By default, only commonly used text formatting and tools are presented in the toolbar. Clicking the button on the far left of the tool bar will open the Advanced toolbar, which offers more options.

> *If you open the attachment from the document, make changes to it, and click the save button, those changes will be saved directly to the server. You can also save a local copy, modify it, and re-attach it to the document.*

Creating a Document from Microsoft Outlook

Users of Microsoft Outlook can drag-and-drop emails directly into a Tracker Suite folder in their Outlook client to create a new document, utilizing an add-in provided by Automation Centre.
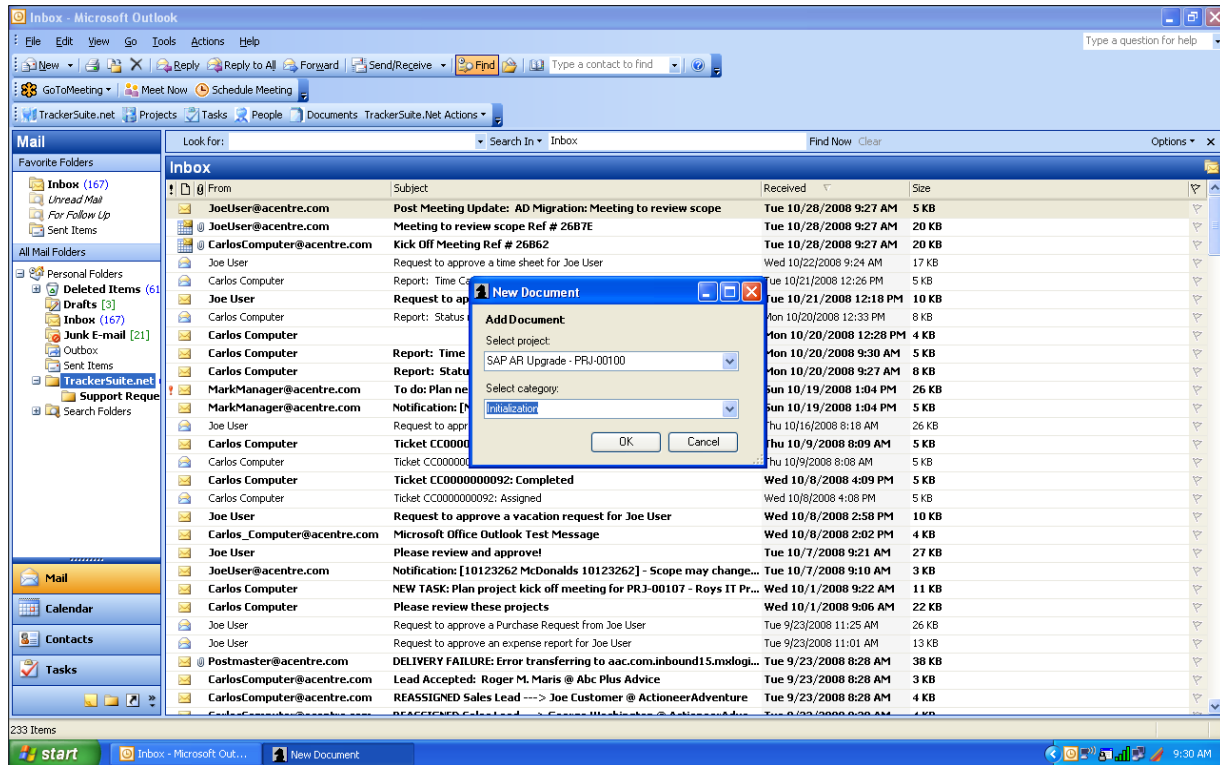
Figure 26 - Converting an Email into a Document

After the user drags the email to the Tracker Suite folder, a confirmation dialog box appears, asking the user what project and which category they would like to file the document under. The user may also write in a new category.

The installation of the add-in is discussed in detail in the *Tracker Suite Base Configuration Guide*.

Exporting Project Tracker Documents

Documents in Project Tracker can be exported as Word documents or as Adobe PDFs by clicking either the Export to Word or Export to PDF buttons in the upper right corner of the document.

Check Out/ Check In Documents

If multiple people attempt to edit the same document, it can create confusion and some changes can be overwritten. To prevent this from occurring, you can check out documents. Once a document is checked out by a user, only that user can make changes to the document until it is checked back in.

Documents can be checked out from the Documents widget by clicking the lock icon to the right of the document required. Documents may also be checked out from the Documents view or the Documents tab by selecting the appropriate document(s) and

clicking the Check Out button. You can also check out a document by opening the document and clicking Check Out in the action bar. In either case, you will be prompted to enter check out notes
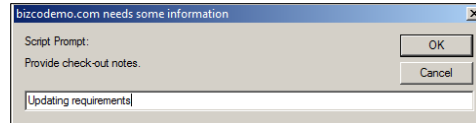

Figure 27 - Document Check-Out Prompt

The check-out notes are saved to the document log so other users can see who has checked out the document and for what purpose.

Once you have saved the necessary modifications to the document, it should be checked back in so other users can make their own changes. Just like checking out the document, you can check in the document by clicking the Check In button in the documents view or the Project Definition document or Check In in the document itself. You will again be prompted to enter notes that will be saved in the document log.

Document Version Control

Another common need is to modify a document, but save a copy of its current state so it can be referenced later. This can be accomplished using versioning. When you version a document, a copy of the document (including attachments) is stored. That copy can be opened, but not modified.

Versioning a Document

New versions of documents are created in the Documents view. Select the document or documents that you would like to version and click New Version. A dialog box will open prompting you for comments. After you enter your comments and click OK, a summary page will open informing you which documents have been versioned.
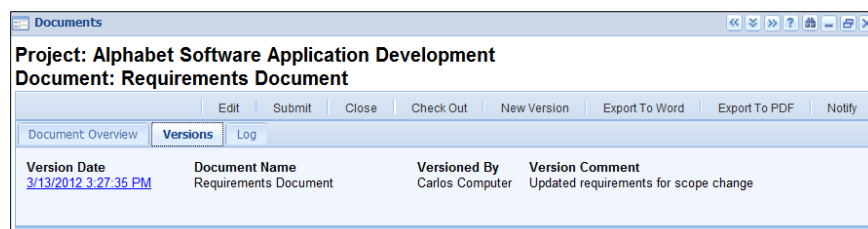

Figure 28 - Document Versions Tab

When a new version of an approved document is created, the new version of the document can be submitted through the approval process.

Opening a Previous Version

Once a document has been versioned, you will see a link in the documents view, a number in parenthesis, next to the versioned doc. Clicking that link will open a view listing the previous versions.

From this view, you can filter or search by who versioned the document or search by comments. Once you find the correct version, click the document name to open the version. The document will look the same as a regular document, except you will not be able to make any changes. From the view, you can also delete previous versions by clicking Delete Document.

Reporting Issues with Projects

Issues Tab

This is where all issues for a project appear. Because Issues can potentially exist on many different forms the security profile is inherited by the parent form.
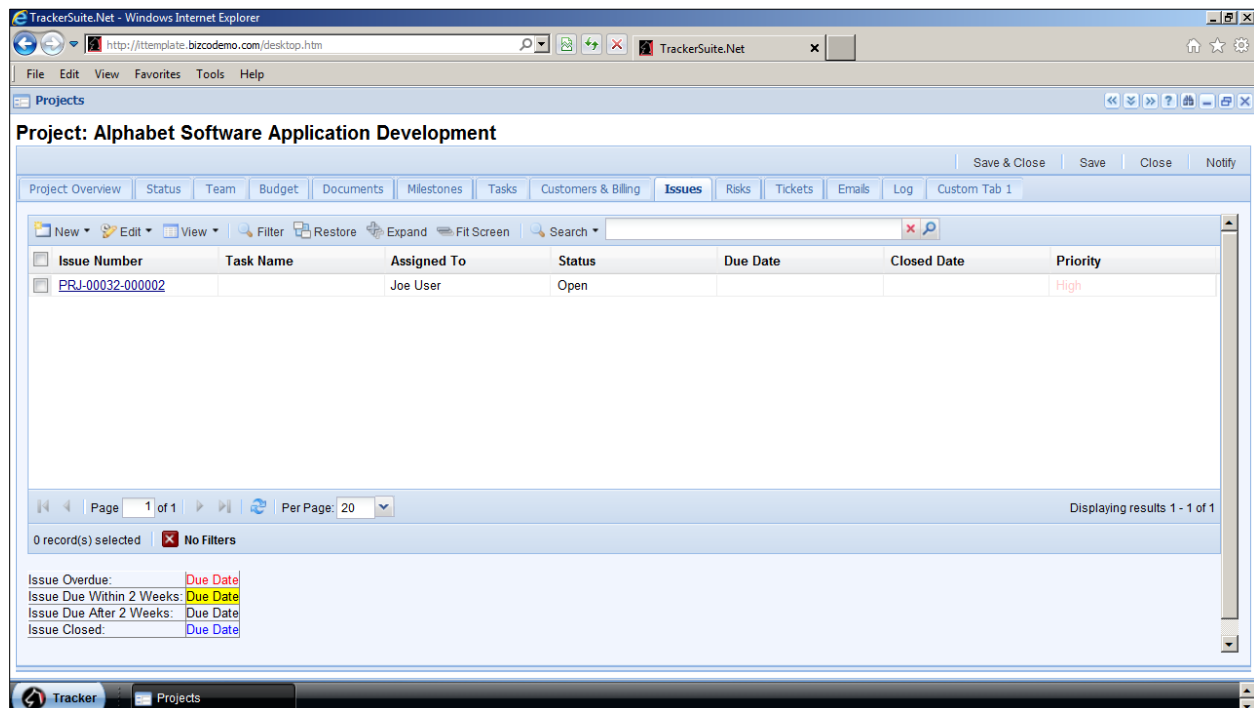

Figure 29 - Issues Tab

To delete an Issue, check the box next to the Issue you wish to remove, then click the Delete button. To create a new Issue for the Project or Task, click the New Issue For Project or New Issue For Task button. A new Issue form will open.

Figure 30 - Reporting an Issue

Project Status Reporting

Status reports include a snapshot copy of project information such as task and milestone status, budget information, and delays that may have come up. Status reports may be viewed within the Status Reports view. The status reports for a particular project are also stored within the Project Definition document of the project.

Creating a Project Status Report

There are several ways to create a status report for a project. In this instance, we will create a status report by opening the Project Definition document of the project in question, and opening the Status tab.

Figure 31 - Status Tab

The Status tab shows the last submitted Status Report for the project. Beneath these metrics, links to all the submitted status reports for the projects are presented.

To open a new Status Report form, click New > Status Report.

Figure 32 - Status Report Form

The Status Report form offers a shortcut for creating a status report, the ability to populate the Status Report based on the previously submitted report, by clicking the Populate from Latest button in the upper right corner. After populating the report, the user can make the necessary updates.

The fields in the Main tab of the Status Report form include:

- **Project Manager:** Automatically populated field that pulls the project manager name from the Project Definition document. This field cannot be edited.

- **Report By:** A status report can be created for someone else by clicking the button and choosing a name from the drop down list. By default the name get populated with the status reports creator's name

- **Current Status:** This drop down list allows you to select one of the defined statuses (see the *Tracker Suite Base Configuration Guide* for more information on configuring statuses).

- **Current Phase:** This field allows you to select the current phase of the project (see the *Tracker Suite Base Configuration Guide* for more information on configuring phases).

- **Project Health:** The overall health of the project. Green projects are healthy. Yellow projects are facing issues to their completion. Red projects are in danger of failure, and/or going critically over budget or over schedule.

- **Overview Status:** A short description of the status of the project. This is displayed in the Project Desktop and some reports, so it should be kept concise.

- **Report From:** The From date is the beginning date of the status report; The period length is defined in the Project Tracker Database Setup document by choosing one of the frequencies formats (see the *Tracker Suite Base Configuration Guide* for more information).

- **Report To:** To date is the ending date of the status report. The period length is defined in the Project Tracker Database Setup document by choosing one of the frequencies formats (see the *Tracker Suite Base Configuration Guide* for more information).

- **Expected Completion:** The date on which the status report creator expects the project to be completed.

- **Percent Complete:** This allows for a numeric value to be entered that will be displayed as a percentage, making it easy to see how much of the project has been completed and what is left to still accomplish.

- **Calculated Percent Complete:** The automatically calculated completion percentage of the project, based on the planned and completed hours on tasks.

The Status report form includes a set of tabs at the bottom, including:

- **Details:** The Detailed Status sub-tab contains exact detailed information about the project. There is also a button, Import Task Statuses/Timesheet Descriptions, which will automatically import all the statuses and timesheet descriptions tied to the project's tasks into the Rich text field below.

- **Issues:** The project has issues hindering it from either moving forward or moving forward at a desired rate.

- **Risks:** Items that make cause risks to a project. This could be any number of things that could cause the previous items to not be green.

- **Health:** The Health sub-tab contains specific and detailed information about the project. Each section can be marked red, yellow, or green and notes can be provided for each. If anything other than green is selected then notes are required.

- **Budget:** The Budget sub-tab contains the project budget information and is automatically populated upon creation from the Project Definition document. These values cannot be changed from this page. They are set in the budget section of the Project Definition document.

- **Tickets:** The Tickets sub-tab holds all support tickets created for the project. Users can create a new ticket from this tab, as well as export all of the tickets to an Excel spreadsheet.

- **Milestones:** All declared milestones for the project are listed in the milestone sub-tab of the status report. As with open and closed tasks, task status, due date and completion percentage is shown for all milestones to get a quick state of the project. This view has all of the functionality of the Milestones tab on the Project Definition.

- **Open Tasks:** The Open Tasks sub-tab allows the status report creator to view the tasks that are open and associated with the project. Before saving the status report, they can create a new task from this view by clicking New > Task from the sub-tab menu.. A task may also be marked complete by placing a check in the checkbox next to the tasks name and then clicking Edit > Task Complete. Once the status report has been submitted the task status page can no longer be used to create a new task or mark tasks as complete.

- **Closed Tasks:** The Closed Tasks sub-tab allows the status report creator to view the tasks that are closed for this project. This way, the status report creator

can quickly see the completed tasks with any delays from history. A new task can be created as well, by clicking New > Task.

- **Custom:** The Custom sub-tab holds all the custom fields for a status report.

- **Attachments:** On the Attachments sub-tab users can attach related documents to the status report of a project. They can attach a file by clicking Manage Documents button.

Attachments can only be added once the status report has been saved.

- **Log:** The Log sub-tab is responsible for logging all major event of a status report.

Submitting a Status Report and Status Notifications

Once a status report has been completed, it should be submitted. You submit a status report by opening it and clicking the Submit button.

Once a status report is submitted, it can no longer be edited.

When you submit a status report, it updates the Project Definition document with the new overview status, project status, project phase, and percent complete. In addition, you can send out a notification that the status report has been submitted.

When submitting or saving a status report the option to send a notification appears. From this notification, the desired project and status information can be included in the notification e-mail.

Exporting Status Reports to PowerPoint, PDF and Word

Project Tracker allows users to export a status reports as files for Microsoft PowerPoint, Microsoft Word and Adobe PDFs. Project managers and staff can utilize this feature to quickly assemble presentation materials for meetings about their projects.

Figure 33 - Status Report: Export to PowerPoint

To export a status report in this fashion, in the upper right corner of the status report, click Export to PowerPoint, Export to Word or Export to PDF button.

If you are exporting to PowerPoint, all of the materials in the status report will be exported. If you are exporting to Word or PDF, you will have the option of selecting what information will be included in the export.

Project Evaluation

A Project Evaluation form may be generated for the project, to gather feedback on its performance, by selecting the project in the Projects view, and clicking Edit > Send Evaluation. A window will open, asking for the recipients to be selected. Once the evaluation is sent, the selected recipients will receive an email invitation with a link, which takes them to the evaluation form.

Figure 34 - Project Evaluation Form

The form may be configured to automatically deliver the evaluation to designated personnel if it does not achieve a certain score. All submitted evaluations are logged in the Project Definition document of their project.

The Project Evaluation form is configurable. To learn more about configuring Project Evaluations, please refer to the *Tracker Suite Base Configuration Guide*.

The Project Desktop

Project Tracker offers specialized desktops which users can configure with widgets. To open a Project Desktop, click the name of the Project you would like to see. The configuration of widgets is discussed in detail in the *Tracker Suite Base Configuration Guide*.

From the Project Desktop, other widgets available include, but are not limited to the following:

- **Project Information:** Shows standard information about the project. The widget toolbar provides the ability to open the Project Definition.

- **Project Issues:** Lists all the issues for the project and its tasks. This widget has a quick filter option to filter by all open, overdue, due today, due this week, due this month, and all closed. The widget toolbar provides the ability to create a new issue for the project, new issue for a task, and change view design.

- **Project Risks:** Lists all the risks for the projects and its tasks. This widget has a quick filter option to filter by all open, overdue, due today, due this week, due this month, and all closed. The widget toolbar provides the ability to create a new risk for the project, new risk for a task, and change view design.

- **Project Documents:** Displays the Documents view for the specific project. The widget toolbar provides the ability to create a new document, a new document

from template, to open the Documents tab within the project's Project Definition form, and to check-out or check-in documents.

- **Project Invoices:** Displays all invoices on for a project and basic budget information about the project. The widget toolbar provides the ability to create a new invoice.

- **Project Milestones:** Displays basic milestone information. The widget toolbar provides the ability to open the Project Definition in the Milestone tab.

- **Project Status Reports:** Displays basic status report health. Placing the mouse over a colored cell will display the detailed information about the subject. Clicking the blue hyperlinked text on the title bar will open the current status report. All status reports are listed by date in the drop down. The widget toolbar provides the ability to create a new status report.

- **Project Team Members:** Displays all team members on a project. The widget toolbar provides the ability to add a team member.

- **Project Tickets:** Displays all tickets for a project. The widget toolbar provides the ability to create a ticket for a project and change view design.

- **Project Links:** Displays global Project Tracker links as well as project specific links. The widget toolbar provides the ability to add a project specific link and change view design.

- **Project WBS Gantt By Resource:** Displays a Gantt chart view of Resources with their planned Tasks, showing Start/End Dates, Planned Hours and Actual Hours.

- **Project Graph Budget VS Actual:** Displays project total budgeted amount, remaining budgeted amount and Actual amount spent in money value.

- **Project Graph Budget VS Actual Hours:** Displays the budgeted hours on a project VS the actual hours that have been logged.

- **Project Line Graph Resource VS Actual:** Display cumulative allocated hours to the resources vs. cumulative actual hours spent by the resources for the project.

Advanced Project Management Options

Through its integration with other Tracker Suite modules, Project Tracker offers unique workflow options for coordinating projects with help desk services, CRM and invoicing. Several of these tabs are visible in the Project Definition document: Tickets, Customers and Billing, and Invoices.

Help Desk Integration

Project Tracker integrates with Support Tracker, the Tracker Suite help desk module. Support tickets created for the project in the course of its execution can be seen in the Tickets tab of the Project Definition document.
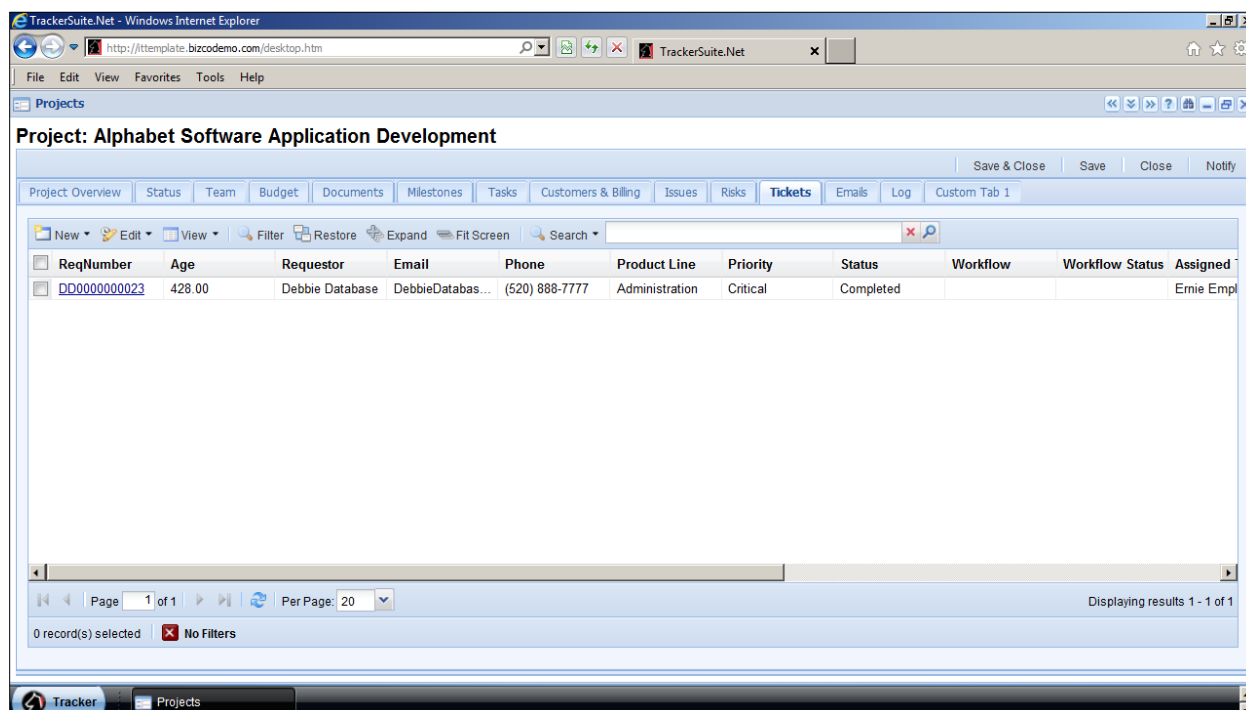

Figure 35 - Tickets Tab in the Project Definition

New tickets can be created for the project by clicking New > Ticket within this tab, as well as from Support Tracker itself.

Within Support Tracker, support tickets can be converted into projects or tasks. To learn more about the integration of Support Tracker.Net and Project Tracker, refer to the *Support Track User Guide* and the *Tracker Suite Base Configuration Guide.*

CRM and Billing

If your organization is utilizing Customer Tracker and Invoice Tracker, when a customer is added to the Project Definition, time and expense can be directly charged to the customer.

Figure 36 – Customers & Billing Tab in the Project Definition

The Customers & Billing tab includes the following:

- **Add Customer:** Clicking the Add Customer button will open up a new Web page dialog window titled Customer Select. From this window you can select an existing customer profile from Customer Tracker, which will automatically populate the customer fields. Enter the PO Number, PO Amount, Max Billable Hours, and PO Expiration, if known, and hit OK to close the dialog.

  Once a customer is added, the Edit Customer and Remove Customer buttons will appear, and this button will no longer be available.

- **Edit Customer:** Click this button to modify the customer information.

- **Remove Customer:** Click this button to remove the customer information that has been entered.

There are three sub-tabs, Billing Rules, Billing Milestones and Invoices.

The fields in Billing Rules include:

- **Show on Invoice Forecast:** If this box is checked, this customer project will appear on Invoice Forecasts.

- **Time Billing Type:** This drop down list allows you to select if customers will be billed based on actual hours charged against the project.

- **Expense Billing Type:** This drop down list allows you to select if expense reports submitted for this project are charged to the customer.

- **Billing Rate:** This field sets the rate at which customers will be billed for hours worked on the project.

- **Bill to CC:** Set the billing cost center code in this field.

- **Statement Of Service:** Set the statement of service text that will display on an Invoice in this free text field. Under the Billing Milestones sub-tab users can create:

- **Billing Milestones tab:** In addition to charging customers based on time and expenses, you can also budget fixed milestones. You can add fixed price milestones by clicking New > Billing Milestone from the menu. You will be prompted to select a milestone, the amount, and when it is expected to be invoiced. When the milestone is saved, it will show up in the list. You can also delete milestones by putting a checkmark next to its name and clicking Delete Billing Milestone.

  - The user can also create an invoice for the listed billing milestones by checking the box next to them, then clicking New > Invoice for Selected Billing Milestones.
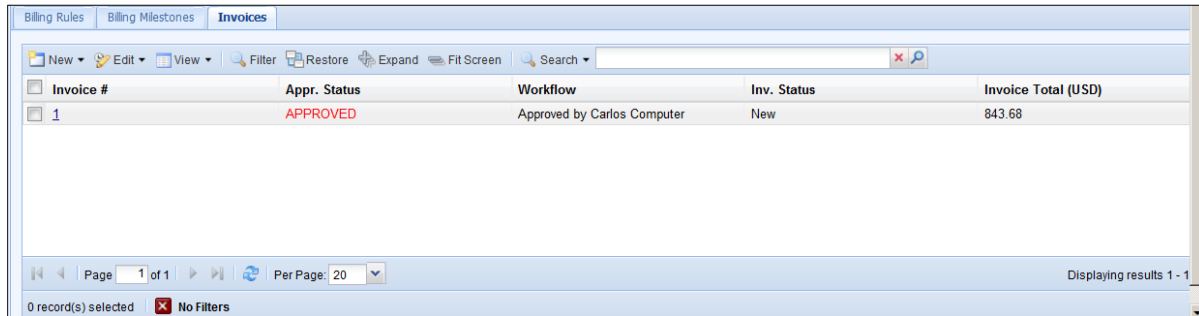

Figure 37 - Billing Milestones Sub Tab

Fixed price milestones are invoiced in Invoice Tracker, another module of Tracker Suite.

Invoice Tab: Under the Invoices sub-tab, all of the invoices generated for the customer in the course of the project are listed, with their approval status and workflow location. Users can open the invoice simply by clicking its hyperlinked number, or create a new invoice by clicking New > Invoice from the menu bar.

Figure 38 - Invoices Sub Tab
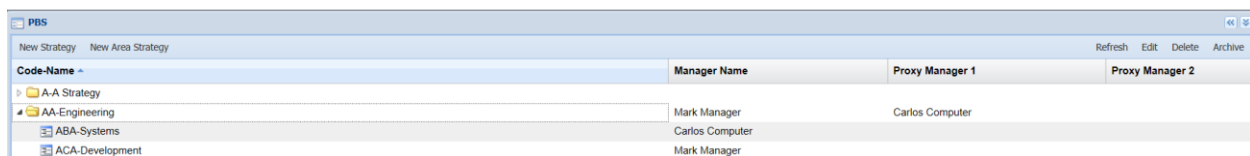
4. Project Portfolio Management

Project Tracker facilitates project portfolio management, by providing PBS level categorization of Programs as well as Program-level categorization and tracking of projects, as well as providing views and reports that assist in the measurement of project cost and value. Project Tracker also provides portfolio management functions for renaming, copying and archiving projects.

PBS Management

A flexible Project Breakdown Structure (PBS) is available to define how many levels of hierarchy to add for Portfolio level project tracking. PBS level configuration is enabled in the Project Tracker Setup form. Think of PBS as a way to manage groups of Programs, which can then be associated with groups of Projects.

This PBS structure allows adding Manager(s) and Team members linked with these levels. Even though security is configurable, by default people added at Manager or Team level will get access on all the child documents under that PBS level like Program, Projects, Tasks, Status Reports, and Issues etc.

To view or create PBS profiles, go to Project Tracker>PBS in the Navigator menu. Example below has two levels of PBS structure that are labeled as "Strategy" and "Area Strategy". To create new Strategies and Area Strategies, you would select the New button related to each:

PBS Managers can quickly view related Programs against their PBS by clicking on the Programs tab on the PBS form:

Program Management

Programs are groups of projects. The group can be based on any criteria, such as programs for particular departments or general initiatives in your company. One advantage of grouping projects into programs is that if you are using team member based security, you can grant rights to the program manager in all of that program's projects.

To view programs, go to Project Tracker > Programs in the Navigator.

Figure 39 - Programs View

To create a brand-new program, in the programs view, click New > Program. Once the appropriate information has been entered, use the Save or Save & Close button to save the program. Based on how your system is configured, if required fields have not been populated a message will appear at the top of the form telling you which fields are missing. The name and the program number are always required, but the program number can be configured to be auto-generated.

The name of a program and its manager can be changed from the Programs view, by clicking Edit > Change Program Name and Edit > Change Program Manager from the top menu.

To view the definition form of an existing Program, which includes its manager, theme, key dates, initiatives, customer and associated contracts, click the Program Definition next to its name. From the Program Definition document, you can use the New Project button to create a new project in this program and all the projects for this program will be listed under that button.

Figure 40 - Program Form

Changing a Program Name and Code

Program names and codes can be changed if necessary. From the Programs view, click Edit > Change Program Name / Code. A dialog window will open with a text field for the new Program name. A new Program Code will automatically generate when the new name is saved. This will update all Projects within the renamed Program.

The Program Desktop

Project Tracker offers specialized desktops which users can configure with widgets. To open a Program Desktop, click the name of the Program you would like to see. The configuration of widgets is discussed in detail in the *Tracker Suite Base Configuration Guide*.

From the Program Desktop, the widgets available include:

- **Program Projects:** Lists all the projects for a specific program. The widget toolbar provides the ability to create a new project, copy project, change project name, add a new task to a project, and change view design.

- **Program Issues:** Lists all the issues for all projects and tasks for a specific program. This widget has a quick filter option to filter by all open, overdue, due today, due this week, due this month, and all closed. The widget toolbar provides the ability to create a new issue for a project, new issue for a task, and change view design.

- **Program Risks:** Lists all the risks for all projects and tasks for a specific program. This widget has a quick filter option to filter by all open, overdue, due today, due this week, due this month, and all closed. The widget toolbar provides the ability to create a new risk for a project, new risk for a task, and change view design.

- **Program Projects Bud vs. Act:** A widget version of the Project Health Dashboard view showing only projects inside of a specific program. The widget toolbar provides the ability to create a new project, and change view design.

- **Project Gantt**: This lists all the projects for a specific program in a Gantt chart format. The default time line is monthly but using the action button, it can be switched to quarterly. The black bar on top is the time duration of the selected program and blue bars shown below that are the time durations of individual projects and the black squares on those blue bars are the milestones for those projects.

- **Program Tickets:** Provides a list of all support tickets created for projects within the program and their status. The widget toolbar provides the ability to create a new ticket and change view design.
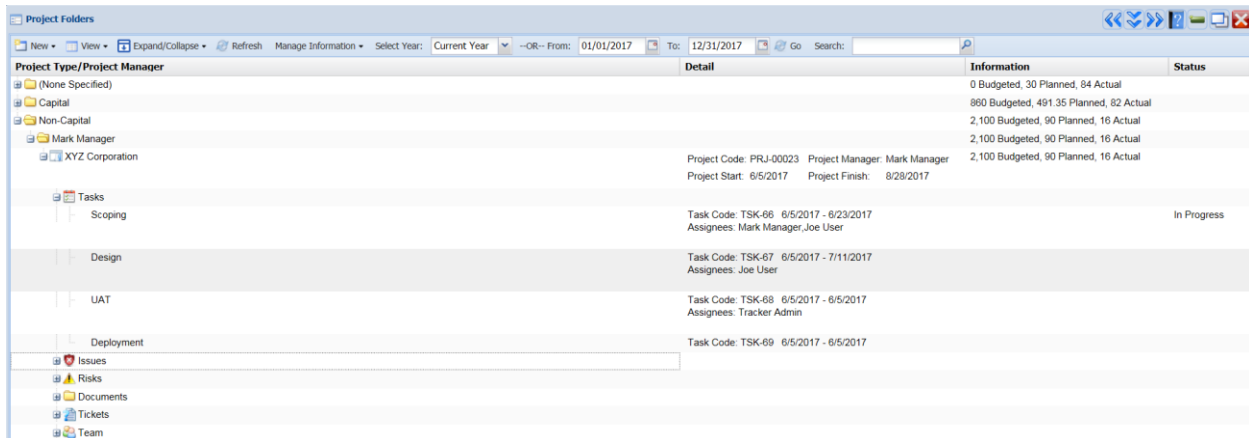
Project Folders

A Project Folders view is available that lists Projects with very flexible options to group them to suit user's requirements. If you expand each level, you will see various entities for that project including

- Tasks
- Issues
- Risks
- Documents
- Tickets
- Team
- Emails
- Links
- Status Reports

Users have the option to add/edit/delete these entities from the tree view. Intuitive context menus are also added at each level to make it a very user friendly experience. Project Folders also support multi-level grouping allowing user to configure grouping order on various options like Programs, Project Manager, PBS Levels, Department etc. Below example has grouping based on Project Type and Project Manager:

Project Milestones View

This view can be accessed from the Navigator by clicking Project Tracker > Milestones. This view shows all the milestones for all projects, color-coded based on its due date, completion status, and the current date.

As well as milestones, the Project Desktop and the latest status report can be opened from this view.

Figure 41 - Project Milestones View

Project Warnings Dashboard

This view can be accessed from the Navigator, from Reports > Project Warnings. It shows all project information, and allows users to configure warning thresholds. From this view, the warnings can be opened by clicking on the warning link. As well as

warnings, the Project Desktop and the latest status report can be opened from this view.

Figure 42 - Project Warning Dashboard

To see the reason why an item was been warning-flagged, the user can simply click the item in question, which will open a dialog box showing how the item is in violation of the warning configuration.

To configure the warning thresholds for this view, click the My Warning Configuration button.
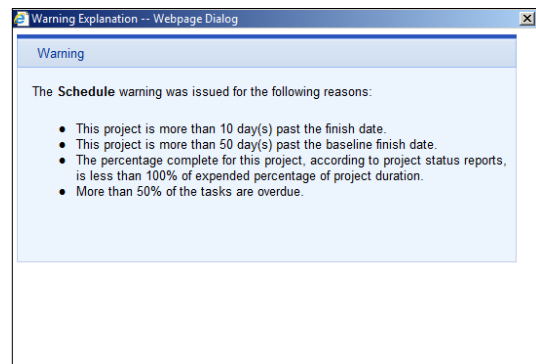

Figure 43 - Warning Dialog

Figure 44 - Project Dashboard: Warning Configuration

Creating a PowerPoint Presentation

By clicking the Generate Portfolio Status button, a PowerPoint presentation of the project portfolio can be generated.

Portfolio Management Project / Program Status

Project Name	Functional Area / Business Sponsor	Schedule Status		Budget Status		Health & Status Overview
		Baseline Completion	Planned Completion	Budget Hrs	Actual Hrs	
Administration 2010	Executive /	12/31/2010	12/31/2010	0.00	3984.25	• Overview: 1st Qtr ongoing ongoing
Alphabet Network Upgrade	Project Management / Carlos Computer	2/28/2011	2/28/2011	2680.00	160.00	Overview: Review of customer expectations raises possible issues. Expectations (Yellow): Customer expectations may require infrastructure changes to be achieved.
Beneci Martinez Bridge	Project Management / Victor Vice President	12/31/2011	12/31/2011	16000.00	7488.00	• Overview: Project timeline and budget facing issues. • On Time (Yellow): Public hearings taking longer than expected • On Budget (Yellow): Survey and engineering reports indicate additional funds may be required. • Issues (Yellow): Bridge construction costs may be higher than expected.
Bizco R&D	Project Management /	8/31/2010	8/31/2010	2700.00	3009.00	• Overview: Project has exceeded budgeted hours • On Budget (Red): Development of new product requiring more labor and resources than expected. • Issues (Red): Development of new product requiring more labor and resources than expected.
Bizco Software Project	Internal IT / Victor Vice President	11/30/2010	11/30/2010	7930.00	2533.00	•
Bizco Widget Project	Project Management / Victor Vice	2/14/2011	2/14/2011	6000.00	3667.25	• Overview: Project costs are much higher than expected • Staff (Yellow): Additional contractors required.

Figure 45 - Project Portfolio

Earned Value

This view shows earned value indicators at the project level and it marks the areas that need immediate attention.

- **CPI Project:** This is the ratio of actual hours and budgeted hours. If actual hours are equal to 90% or more of budgeted hours, this cell is marked Yellow and if it is 100% or more than it is marked Red.

- **CPI Task:** This is the ratio of Actual Hours and Resourced Hours. If actual hours are equal to 90% or more of resourced hours, this cell is marked Yellow and if it is 100% or more than it is marked Red.

- **SPI Project:** This is the ratio of Budgeted Hours and Resourced Hours. If resourced hours exceed the budgeted hours, this cell is marked Yellow.

- **ETC Bud - Act:** This shows budgeted minus actual hours. If actual hours exceed the budgeted hours, this cell is marked Red.

- **Project Task Variance:** This is the ratio of Resourced Hours and Budgeted Hours. If resourced hours exceed budgeted hours, this cell is marked Red.

Project Name	Project Code	Bud. Hrs	Pln. Hrs	Act. Hrs	% Comp	CPI Project	CPI Task	SPI Project	ETC Bud - Act	Project Task Variance
Administration 2010	PRJ-00009	0.00	13440.00	4144.25	0.00		3.24		-4144.25	0.00
Alphabet Network Upgrade	PRJ-00034	2680.00	2240.00	160.00	0.00	16.75	14.00	1.20	2520.00	0.84
Beneci Martinez Bridge	PRJ-00021	16000.00	13800.01	7488.00	45.00	2.14	1.84	1.16	8512.00	0.86
Bizco R&D	PRJ-00007	2700.00	2090.00	3009.00	55.00	0.90	0.69	1.29	-309.00	0.77
Bizco Software Project	PRJ-00014	7930.00	4340.00	2533.00	44.00	3.13	1.71	1.83	5397.00	0.55
Bizco Widget Project	PRJ-00012	6000.00	5358.00	3667.25	100.00	1.64	1.46	1.12	2332.75	0.89
Manhattan Office IT Infrastructure	PRJ-00004	850.00	692.00	1512.00	85.00	0.56	0.46	1.23	-662.00	0.81
New ERP System	PRJ-00033	0.00	2464.00	184.00	0.00		13.39		-184.00	0.00
Sales 2010	PRJ-00010	9600.00	0.00	2672.00	35.00	3.59	0.00	0.00	6928.00	0.00
San Antonio Medical EHR System	PRJ-00006	0.00	3520.00	1507.00	72.00		2.34		-1507.00	0.00
Six Sigma Project	PRJ-00005	2750.00	2068.00	1559.00	80.00	1.76	1.33	1.33	1191.00	0.75

Figure 468 - Earned Value View

Financial Planning Report

This report shows the financial data at various stages for all the projects. This includes baseline, budgeted, actual, GL actual, planned and forecast data. You can add and remove these columns from this report. Several filter options are also available for specific project attributes. The report remembers the filters used and on next open it uses those filters by default.
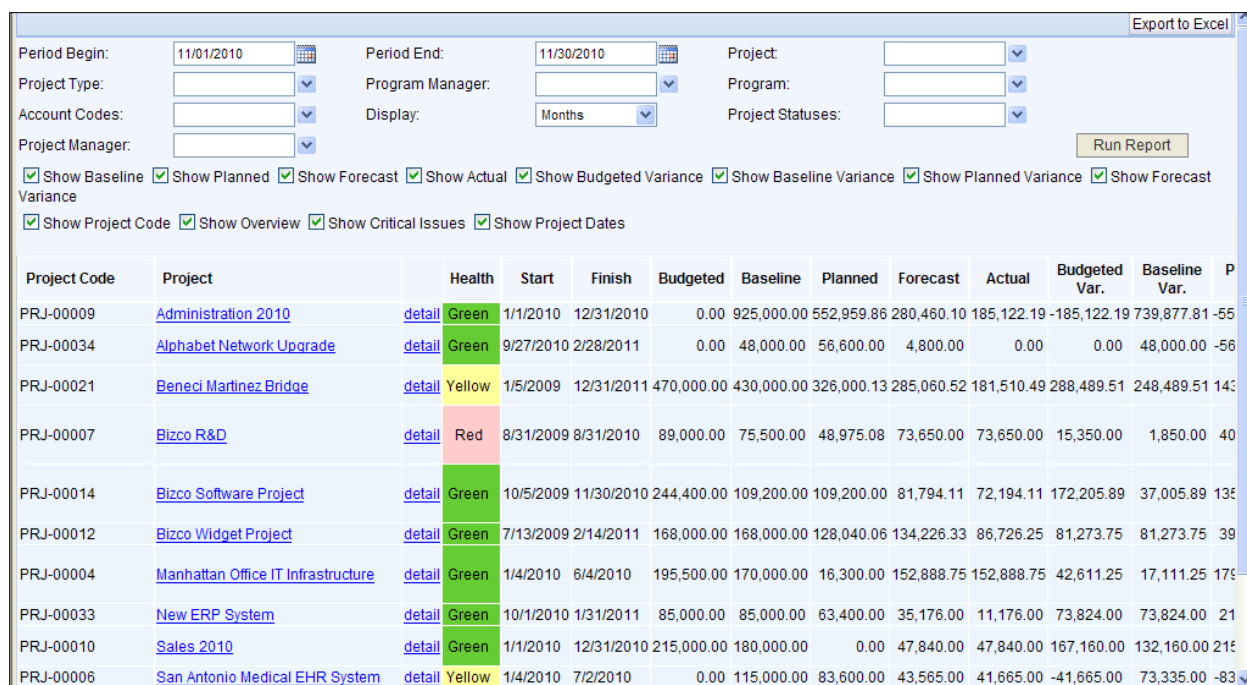
Figure 49 – Financial Planning Report

Program and Project Burn Up Graphs

Project Tracker offers burn up reports at the program and project level for tracking work and progress over time. These reports are available as widgets for the Program and Project Desktops.
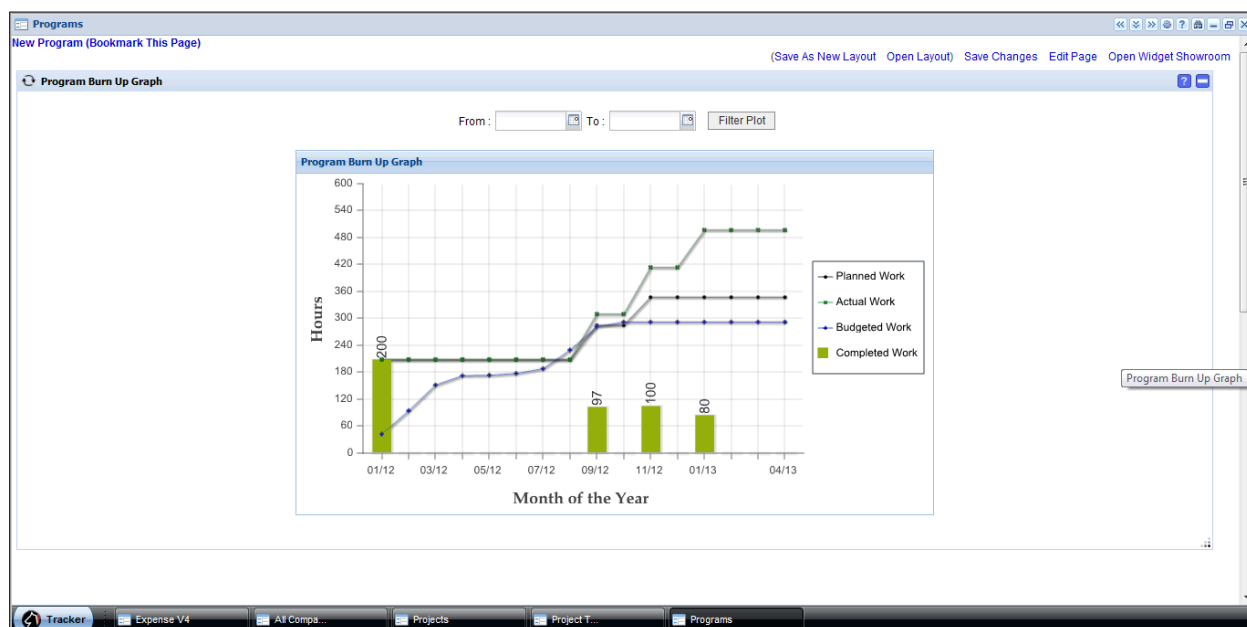
Figure 470 - Program Burn Up Graph Widget

Project Reports with Microsoft Word

Users can export project data to Word documents, via templates. There are two possible methods.

- From the Projects view, select the project to export. From the top menu, click Edit > Export to Word. Select the template you wish to export the data to and click "Okay".

- From the Project Definition, in the upper right corner of the form, click the Export button, and select the template you wish to export the data to.

The configuration of these templates is discussed in the *Tracker Suite Base Configuration Guide*.

Copying a Project

Projects can also be copied from the Project Dashboard view. Check the project you wish to copy, then click Edit > Copy Project from the top menu bar.

Archived projects can also be copied. This is another excellent reason to archive completed initiatives rather than deleting them, over time the organization can amass a collection of templates from successful projects, which can be applied to future endeavors.

When a project is copied, all of its associated documents and tasks are also copied. If your installation of Tracker Suite is set up to auto-generate project codes, you can select multiple projects to copy. If you do so, you will not be prompted to change any information (name, dates, etc.).

If you select a single project to copy, the following dialog will appear:
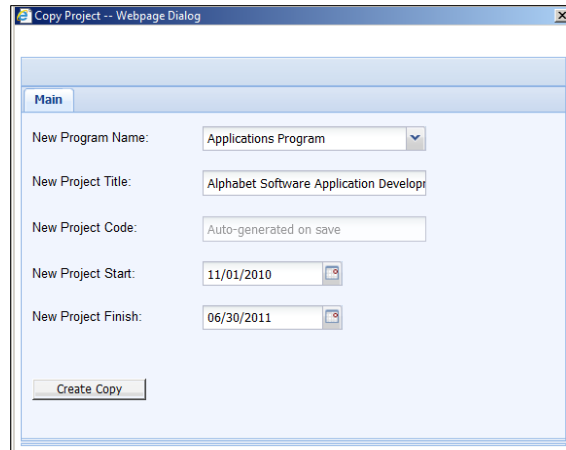
Figure 481 - Copy Project

From here you can change the program, name, code, start date, and end date. If the project code is not auto-generated, you will need to change it before you will be able to make the copy. When you are ready to make the copy, click Create Copy. After the project is copied, you will be prompted if you want to navigate to the new project's desktop.

Changing a Project's Name

Because project names are referenced many places in Tracker Suite, you cannot change the project name directly in the form. To change the project name, go to the Project Dashboard view, select the project then click Edit > Change Project name from the top menu bar. You will be prompted for the new project name.

Once you click OK, the project name will be updated throughout the software. If there are many affected documents, this can take a few minutes.

Archiving or Deleting Projects

If projects which are completed or inactive need to be removed from views of active projects, they may be archived or deleted entirely.

> ***It is STRONGLY RECOMMENDED to archive projects, rather than deleting them. Deletion cannot be undone!*** *Deleting projects can cause confusion if there are time sheets or other documents that reference the project or its tasks. By default, deletion rights are limited to Administrators to prevent users from accidentally deleting crucial information.*

Archiving Projects

Archiving a project removes it from the main projects view and archives all of its associated documents (tasks, status reports, etc.). To archive a project, go to the Project Dashboard, check the projects you wish to archive, then click Edit > Archive Project from the top menu bar. If many projects are selected or the projects have a lot of supporting documentation, this can take a few minutes.

> *There is an option in the Project Tracker Database Setup document to remove archived projects from the Data Warehouse. If that option is checked, when the project is archived its information will also be removed from the Data Warehouse and will not be available for reporting.*

To view projects that have been archived, click View > View Archived from the top menu bar. The view that opens will look essentially the same, but will display archived projects instead of active projects. From this view, you can unarchive projects by selecting the projects and clicking Edit > Unarchive Project.

Deleting Projects

You can delete projects by going to the Project Dashboards view, selecting the projects you would like to delete, and clicking Edit > Delete Project. This will delete both the Project Definition and its associated documents, including tasks, status reports, and so on.

A. Troubleshooting and Support

Technical Support

To report any bugs or problems, please contact the Automation Centre at the following address:

Automation Centre

435 East 9th Street
Tucson, AZ 85705
Voice: 520.882.9287
Fax: 520.623.8721
E-mail: support@acentre.com
Website: www.TrackerSuite.Net

As with all other Tracker Suite applications, Automation Centre can also customize Project Tracker to meet your company's specific needs.

Common Problems and FAQs

I'm having problems installing Tracker Suite/Project Tracker on the server.

Consult the Tracker Suite Base User and Installation Guide.

I'm not going to use the Programs in Project Tracker. Is there a way to disable them from my Project Tracker?

If your company is not going to use Programs in Project Tracker, you can simply disable them by opening the Project Database Setup document and clicking the option "Not using programs".

Can I make some fields on Project Definition form mandatory? Also, how can I change the Workflow associated with this form?

There are a number of configurations that are detailed in Tracker Suite Base User and Installation Guide. You can alter field validations, configure or change workflows and create new menu links for Tracker Suite applications.

Is there any maximum limit in configuring the Project Types or Status Setups?

Absolutely not. You can configure as many Project Types or Status Setups as you want. However, it is recommended to not to duplicate the values in terms of their practical

meanings. For example, do not configure Execution and Implementation as Status Setups. The same is true for Task Categories, Phases and other configurable lists.

How can I see projects related reports in Tracker Suite?

There are a number of projects related reports in Tracker Suite. All these reports are available under "Reporting > Tracker Reports" link. If you cannot see the reporting link, consult Tracker Suite Base User and Installation Guide or Automation Centre support team for necessary configurations.

The WBS view is running slowly.

In the Project Definition, use the Sub Task tab.

How do I see a list of my tasks?

In the Tasks view, filter the Assignee column by your name. You may also filter the status of your tasks, so as to display only those tasks that are open, or those that you have completed. You can save your modifications as a private view, which you can re-use later.

I am getting JavaScript errors.

Clear your browser cache, and verify that any pop-up blockers have been turned off, and that your Tracker Suite site is included in your browser's list of trusted sites.

B: Smart Tags

The following is a list of the available Smart Tags in Project Tracker, for use in the creation of Document Templates.

Smart Tag	Contains
##ProjectTitle##	Project Title
##ProjectCode##	Project Code
##ProjectSponsor##	Project Sponsor
##ProjectDescription##	Project Description
##ProjectPriority##	Project Priority
##ProjectStartDate##	Project Start Date
##ProjectEndDate##	Project End Date
##ProjectBudgetedCost##	Project Budgeted Cost
##ProjectLaborCost##	Project Labor Cost
##ProjectNonLaborCost##	Project Non Labor Cost
##ProjectManager##	Project Manager
##ProjectOBSName##	Project OBS Name
##ProjectProgram##	Project Program
##ProjectPhase##	Project Phase
##ProjectStatus##	Project Status
##ProjectType##	Project Type
##ProjectCategory##	Project Category
##CustText1## - ##CustText10##	Custom Text fields 1 - 10
##CustNumber1## - ##CustNumber10##	Custom Number fields 1 - 10
##CustDate1## - ##CustDate10##	Custom Date fields 1 - 10