TUTORIAL: HOW TO USE THE NEW PROJECT TRACKER IN MYAPPS

biorius

In this step-by-step guide, we'll walk you through the main features, show you how to customize the tracker for your needs, and explain how to maximize its benefits.

Step 1: Access the Project Tracker

1. Log In to your MyApps account.
2. In the top navigation ribbon, locate and click on the Project Tracker button. This will take you directly to the project tracking interface.
3. You are now in the Project Tracker workspace, where you'll find a comprehensive overview of your projects, tasks, and documents

Step 2: Customize Your Display

Customizing your project tracker ensures you are focusing on the most relevant tasks and products for your business.

1. Filter Options: At the top-right corner of the screen, you will see a filter option. This filter allows you to switch between viewing:
    - Favorite Products: Products you've marked as favorites for quick access.
    - All Ongoing Products: A list of all products currently active in your workflow.
2. Marking Products as Favorites:
    - Navigate to the All my products tab to see a complete list of your products.
    - On the left side of each product, you'll see a star icon. Click the star next to any product you want to mark as a favorite.
    - Once marked as a favorite, this product will be easily accessible in the Favorite Products filter, making it simple to track important items at a glance.

Step 3: Manage and Track Tasks

One of the key features of the Project Tracker is the Task Management system, allowing you to efficiently track both your tasks and those of your team.

1. Task List: Next to the pie chart, you'll find a detailed task list:
    - Each task is listed with its product name, product code and task description.

- Click on any task to be redirected to its specific workspace, where you can see full details and upload documents.

2. Viewing More Tasks
    - If you have many tasks, click the "View more tasks" button to expand the task list and see additional items that may not be displayed on the default screen.
    - This ensures you never miss any tasks related to your projects.

Step 4: Document Management

Efficiently managing product documents is crucial for keeping your projects on schedule. The Project Tracker helps you stay organized by tracking and managing necessary documents for each product.

1. Track Missing Documents:
    - The "Documents" tile on your dashboard shows a real-time status of your documents.
    - Here, you can see at a glance which products are missing required documents, so you can act quickly to gather and submit them.
2. Access Full Document List:
    - Click the "View full list" button to open a detailed view of all products with missing or incomplete documentation.
3. Export Document List:
    - If you need to share or analyze the document status, use the “Export list” function to download an Excel file listing all missing documents.
    - The export tool allows you to pre-filter the list to include only the products or document types you're interested in, giving you a tailored report.

Step 5: Monitor Ongoing Product Status

The Project Tracker also provides a clear view of the status of your ongoing products, allowing you to see where each product stands in the project lifecycle.

1. Product Status Overview:
    - The ongoing products section shows the current status of all services associated with each product.
    - You'll be able to see the main product details, the status of the composition and the last activity date.

2. Expand Product Details:
    - Click on any product in the list to expand its details. This will reveal further information about the associated services, including progress status and timelines.
3. Export Product Data:
    - You can also export the data from the ongoing products section into an Excel file for easy review and sharing.
    - This export will provide you with a clear and organized report of all ongoing services and statuses, helping you keep track of your products and collaborate more effectively with your team.

Step 6: Maximize Efficiency with Real-Time Insights

With all these features working together, the Project Tracker offers real-time updates and an organized system to help you manage every aspect of your projects, from tasks to documents and product status.
By staying up-to-date with these insights, you can improve your decision-making, reduce delays, and maintain smooth project execution.

Additional Tips:

- Check the Dashboard regularly for updates on tasks, documents, and product statuses.
- Use the favorite products feature to prioritize important items and save time navigating through your projects.
- Take advantage of the Export functions for both documents and product data to keep your reports up to date and easily shareable with team members.

By following this guide, you'll be able to take full advantage of MyApps' new Project Tracker feature, enhancing your workflow, improving collaboration, and keeping your projects on track effortlessly.