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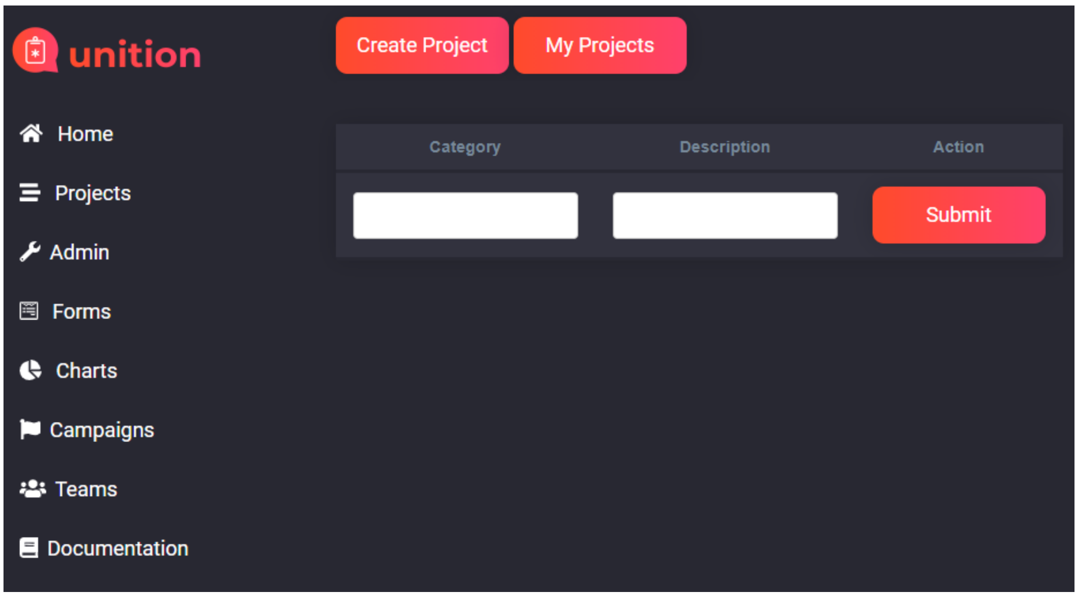
Categories

Why Use Categories?

- Categories are a way to track how much time you are spending on different types of tasks.
- Group common projects together.

How to Create a Category

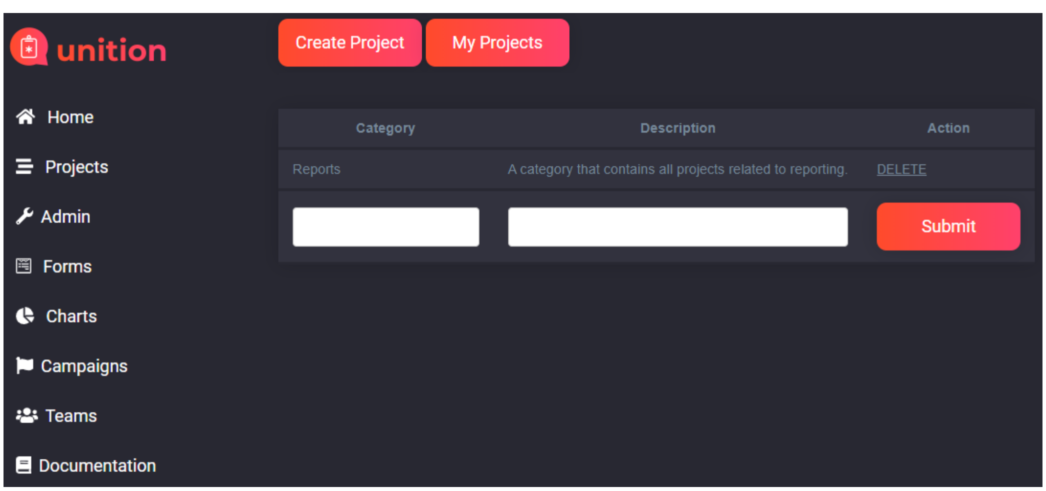
- Categories are created through your admin portal. Navigate to your portal by clicking “admin” on the left side of the page.
- From there, you’ll choose the “categories” option which will pull up a screen like this:



- To create a new category, simply type the name of your category in the “Category” column, add a short description of what the category is, and press “Submit”.

How to Delete a Category

- To delete a category, you will navigate to the categories page through your admin portal where you will see a screen like this:



- From here, you will identify the category you want to delete and press the "DELETE" option under the "Actions" column.

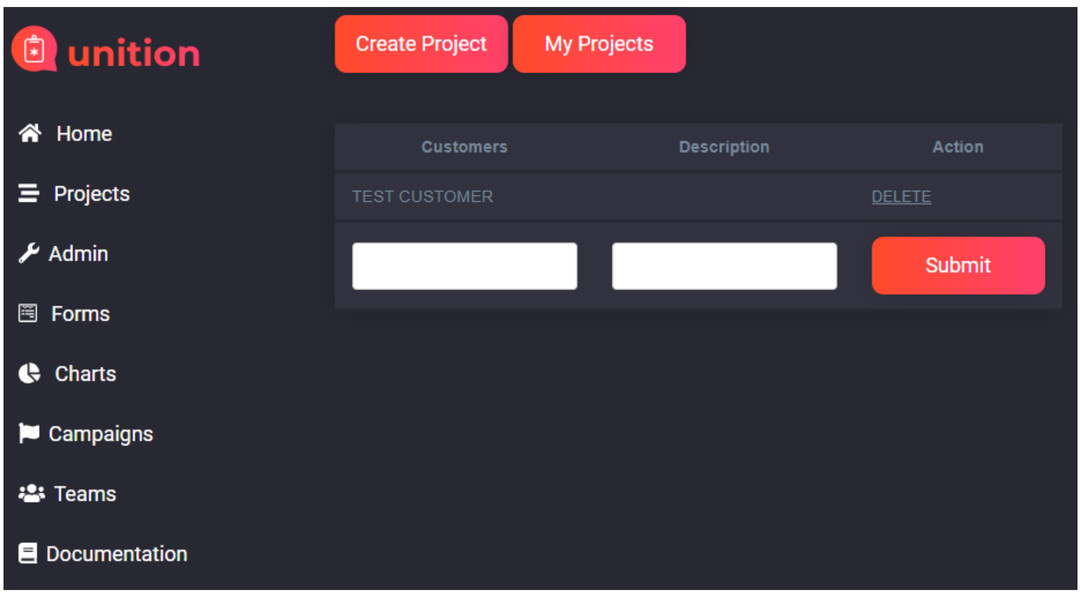
Creating Customers

Why Use Customers?

- Customers are a way to track how much time you are spending on serving different stakeholders.
- Group common projects together.

How to Create a Customer

- Customers are created through your admin portal. Navigate to your portal by clicking "admin" on the left side of the page.
- From there, you'll choose the "customers" option which will pull up a screen like this:



- To create a new customer, simply type the name of your customer in the "Customer" column, add a short description of what the customer is, and press "Submit".

How to Delete a Customer

- To delete a customer, you will navigate to the customer page through your admin portal.
- From here, you will identify the customer you want to delete and press the "DELETE" option under the "Actions" column.

Changing your Theme

- To change the theme layout of your Unition App, you can choose from a variety of pre-constructed themes within your admin portal.

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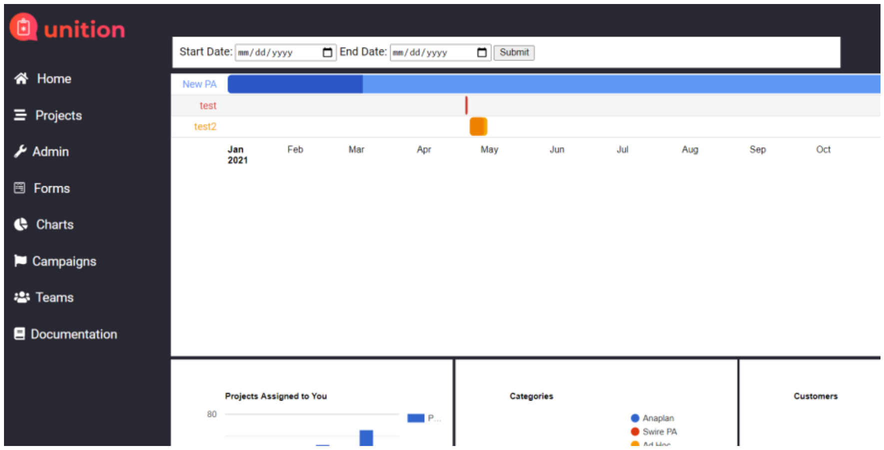
Filtering Charts

- The charts page has an option to filter the data that is included in your visualizations. These filters are located directly above your charts (on the charts page) as shown below:



- Currently, the filters are limited to “Start Date” and “End Date”. When additional filters are added, however, they will be located in the same place.
- When you set a start date, you must select an end date (and vice versa).
- Selecting both a start date and an end date will return all results between those two dates. For campaigns, this means that the campaign start date is after the selected start date and the campaign end date is before the selected end date.

Campaigns

- The “Campaigns” feature allows you to track the progress of longer projects (called campaigns) through the use of Gantt Charts.
- Creating a new campaign requires you to navigate to the campaigns page and enter a campaign name, a start date, an end date, a resource, and the percentage complete.
- A resource is a free field for you to use creatively; however, it is most commonly used to group common campaigns together.
- Campaigns with the same resource will be displayed in the same color.
- Hover over a campaign to view details.