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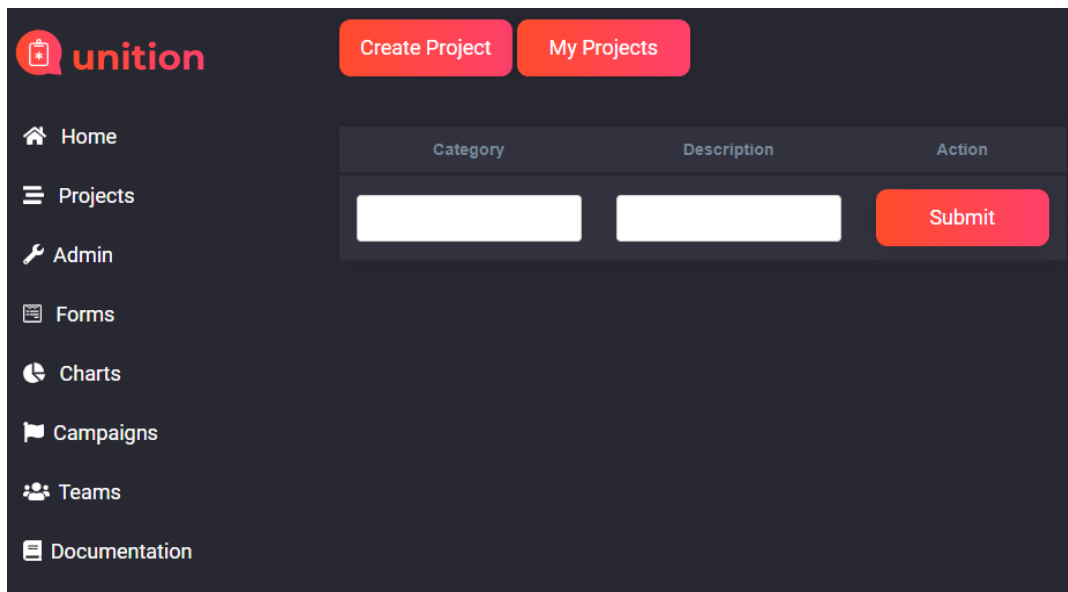
Categories

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:



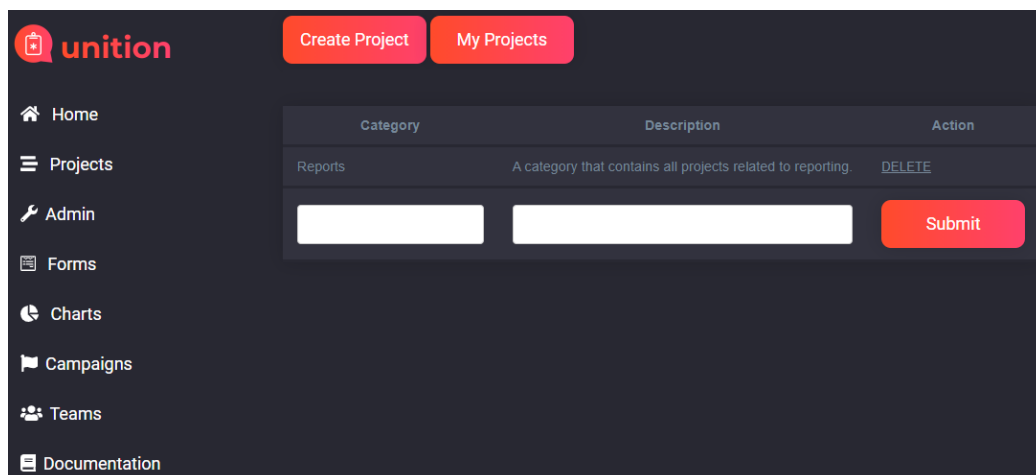
The screenshot shows the 'Create Category' form in the Unition admin portal. The interface has a dark theme. On the left is a sidebar with navigation links: Home, Projects, Admin, Forms, Charts, Campaigns, Teams, and Documentation. At the top right are two buttons: 'Create Project' and 'My Projects'. The main form area has a table with three columns: 'Category', 'Description', and 'Action'. The 'Category' and 'Description' columns contain text input fields. To the right of the 'Description' field is a red 'Submit' button.

Category	Description	Action
<input type="text"/>	<input type="text"/>	<button>Submit</button>

- 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:



The screenshot shows the 'Categories' list page in the Unition admin portal. The interface is similar to the previous one. The table now lists existing categories. The first row shows a category named 'Reports' with the description 'A category that contains all projects related to reporting.' and a 'DELETE' link in the 'Action' column. Below this is an empty form row with input fields for 'Category' and 'Description', and a 'Submit' button.

Category	Description	Action
Reports	A category that contains all projects related to reporting.	DELETE
<input type="text"/>	<input type="text"/>	<button>Submit</button>

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

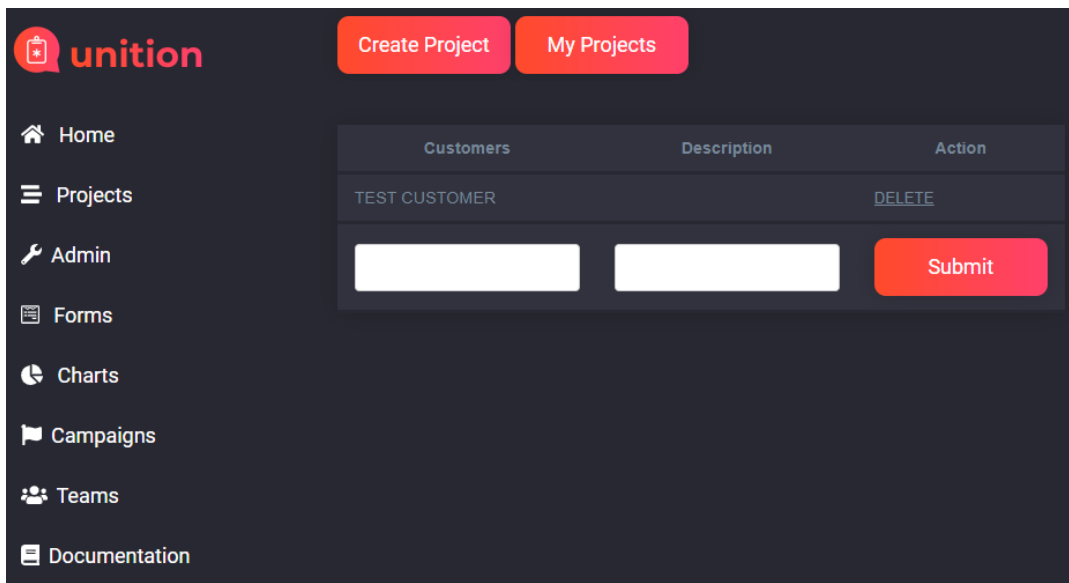
Creating Customers

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:



The screenshot displays the Unition Admin Portal interface. On the left is a dark sidebar with navigation links: Home, Projects, Admin, Forms, Charts, Campaigns, Teams, and Documentation. At the top of the main content area, there are two red buttons: 'Create Project' and 'My Projects'. Below these, a table with three columns is visible: 'Customers', 'Description', and 'Action'. The table contains one row with the text 'TEST CUSTOMER' in the 'Customers' column and a 'DELETE' link in the 'Action' column. Below the table, there are two white input fields for entering customer information, followed by a red 'Submit' button.

- 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

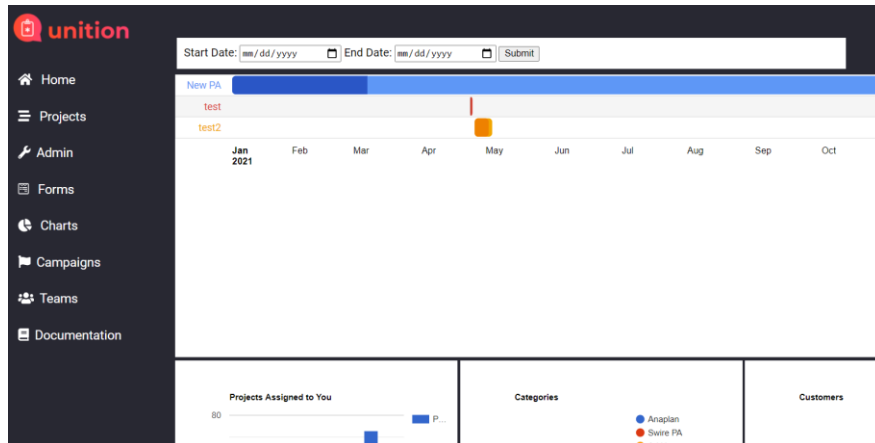
- To delete a customer, you will navigate to the customer page through your admin portal.
- From here, you will identify the customer you want to delete and press the “DELETE” option under the “Actions” column.

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.

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.

