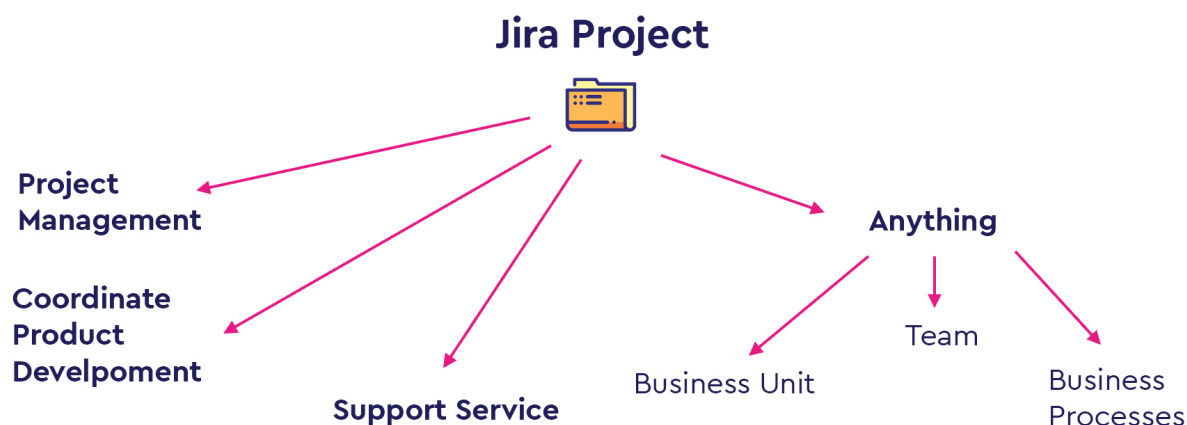




How to get data,
keep control and
lead your projects

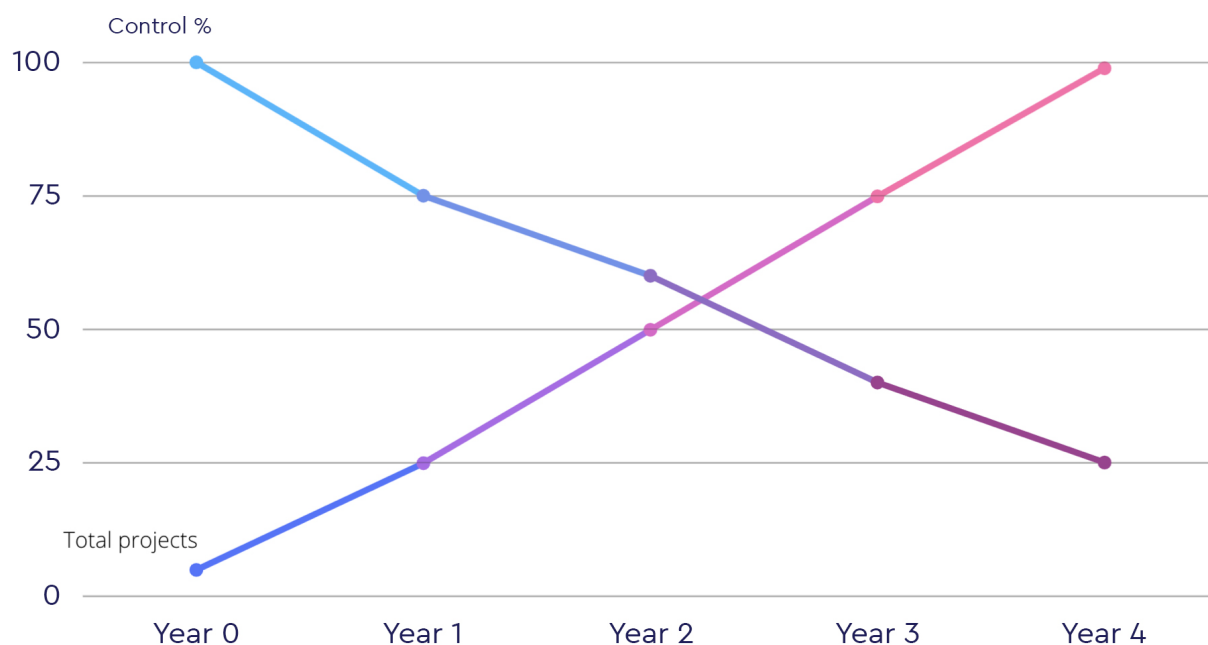


After several years working with PMOs, Service Managers, Jira administrators, and even C-level executives, we found out that users use to lose control of their projects in Jira as a consequence of not controlling project typologies and information, they have a lot of information about issues but not too much about projects.



On the other hand, we know Jira projects can multiply infinitely if they aren't supervised:

More projects + more users = less control

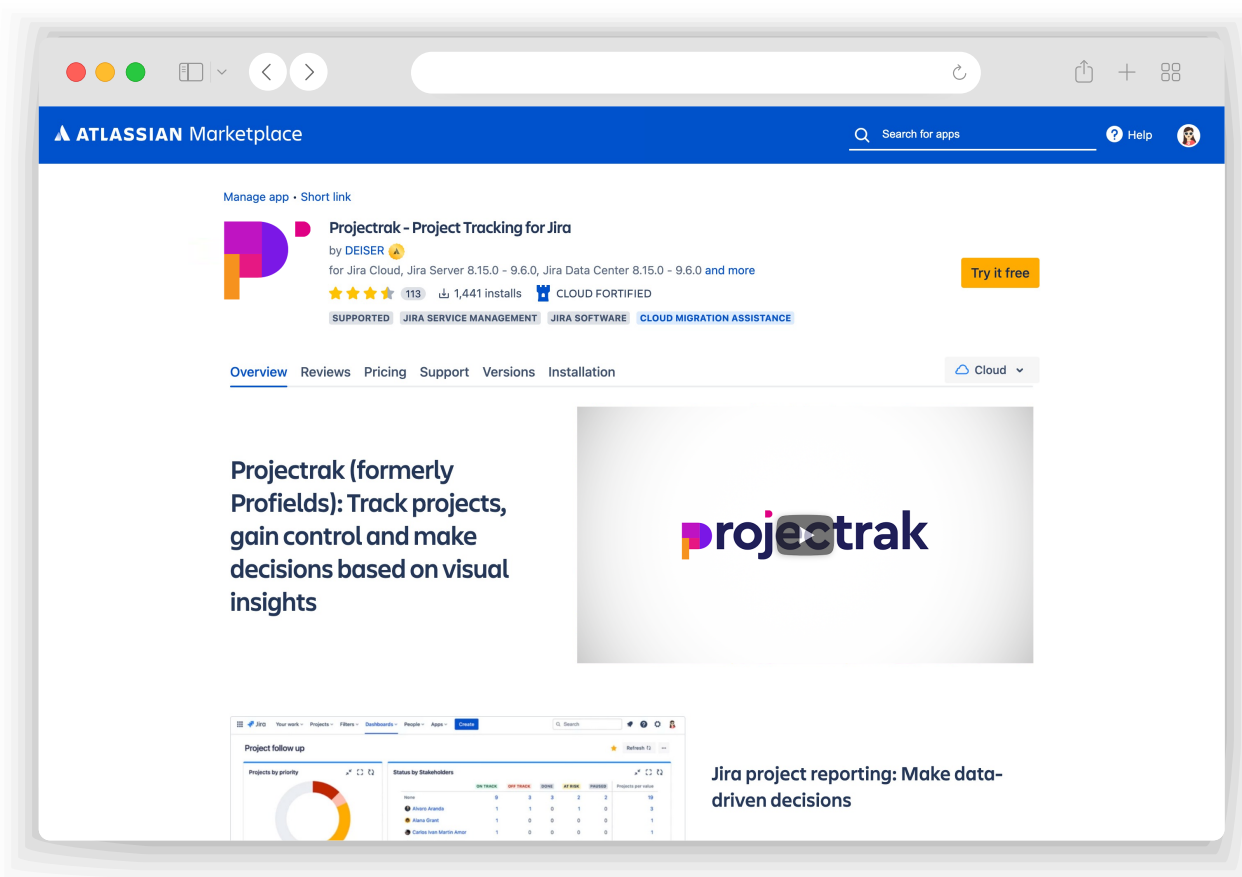


This often leads to chaos getting to the point when it won't be possible to answer any of the following questions:

- What is my project portfolio?
- Which project is closest to its deadline, and why is it still open?
- How to collaborate through projects?
- What is the current situation of my projects?

To avoid this, **use Projectrak** and implement the following:

Step 1. Install Projectrak.



Step 2. Show to your project leads, managers and teams how to fill the project information.

They must fill in the information about the project to keep a better control (this step is critical to track Team managed projects).

The screenshot shows the 'Project sheet' interface for a project named 'Paltform B'. The interface is divided into several sections:

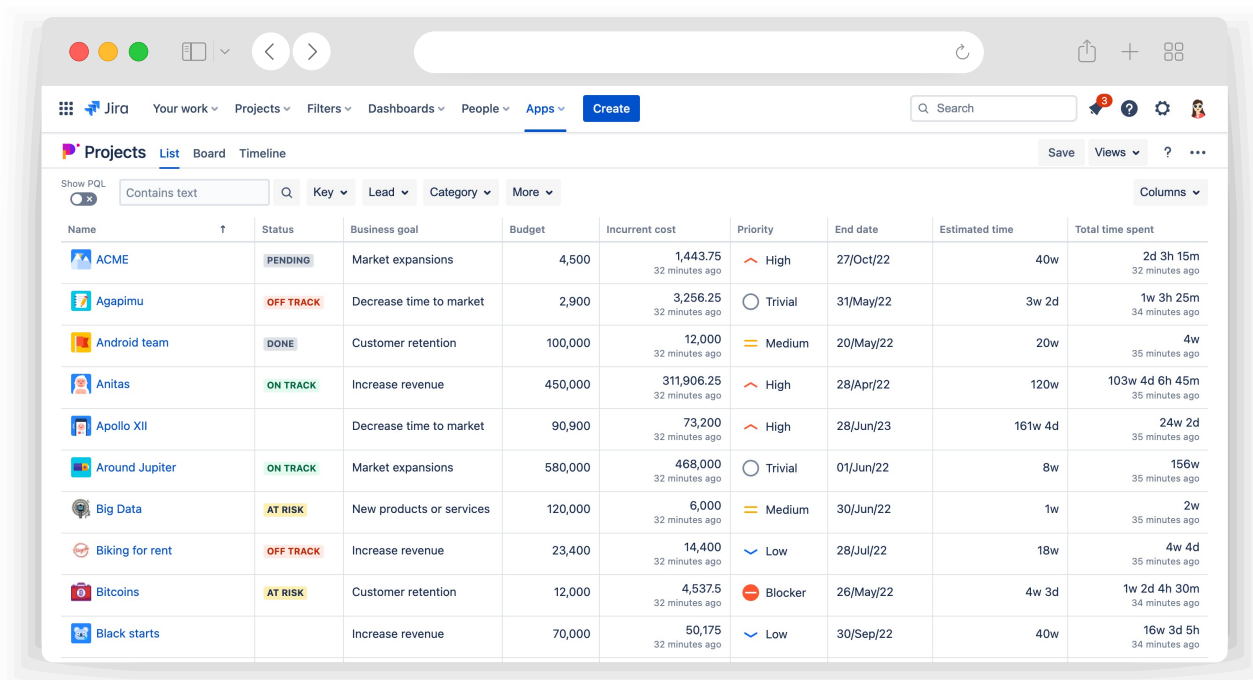
- System data:** Includes fields for 'Updated' (14/Feb/23), 'Lead' (Laura Barreales), 'Created date' (3/24/2022), 'Creator' (Alvaro Aranda Jimén...), 'Description' (Empty), 'Category' (Project tracking), 'Type' (Software), and 'URL' (Empty).
- Follow-up:** Includes a 'Status' dropdown menu (PAUSED), a 'CLOSED' section with 'AT RISK', 'OFF TRACK', and 'ON TRACK' options, 'Start date' (9/18/2022), 'End date' (6/30/2024), 'Estimated time' (98w), and a 'What are we doing?' section with a text input field.
- Involved:** Includes 'Related projects' (Blockcha..., Apol..., Application...), 'What projects is it related to?', 'Stakeholders' (Guillermo Montoya Fane..., Carlos Martín Am..., Gema Tapia Ru...), and 'People involved in the decision making'.

The interface also features a sidebar with navigation options like 'PLANNING', 'DEVELOPMENT', and 'Project data', and a top navigation bar with tabs like 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', and 'Apps'.



Use **formula fields** to automate the calculation of numeric fields.

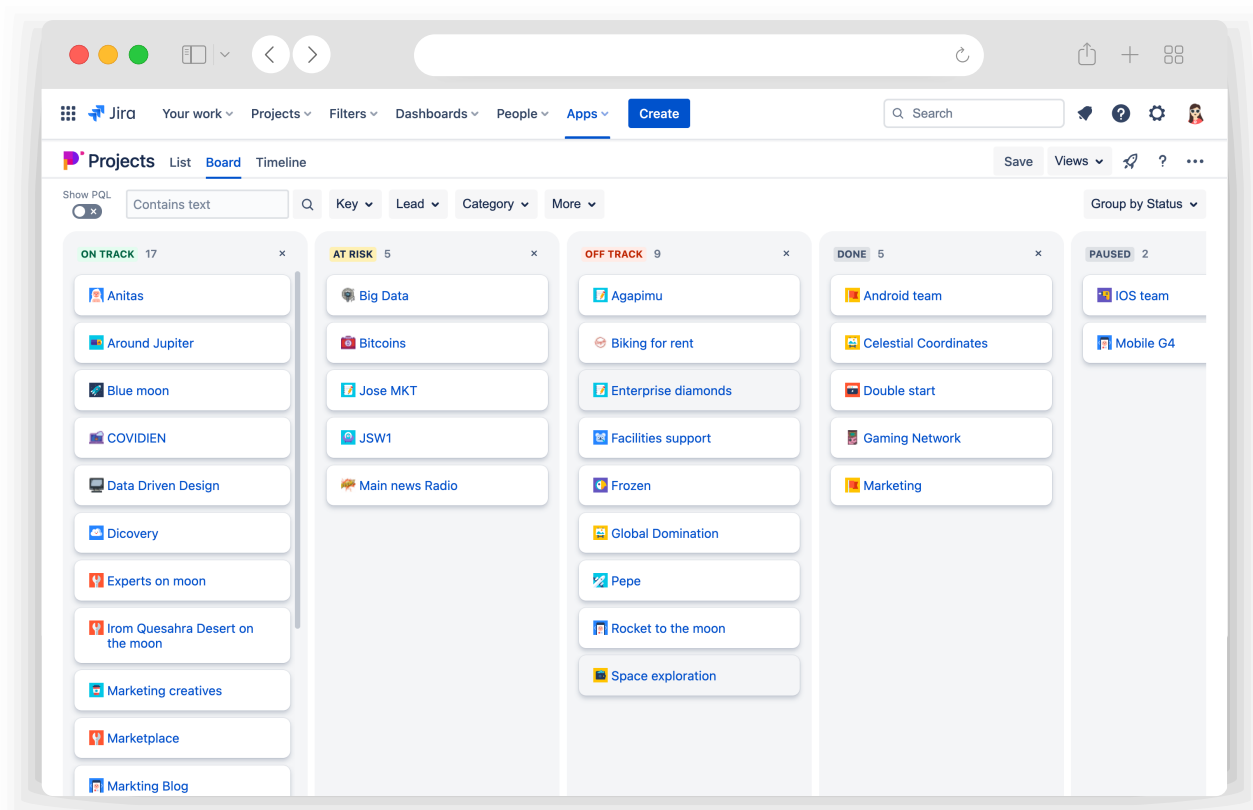
Step 3. Check your project portfolio in the **List View** on the **Project Navigator**.



The screenshot shows the Jira Project Navigator in List View. The interface includes a top navigation bar with 'Jira', 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. A search bar is on the right. Below the navigation bar, the 'Projects' section is active, showing a list of projects with columns for Name, Status, Business goal, Budget, Incurrent cost, Priority, End date, Estimated time, and Total time spent. The projects are sorted by status, with 'ON TRACK' projects at the top and 'AT RISK' or 'OFF TRACK' projects below. The 'ON TRACK' projects include 'ACME', 'Agapimu', 'Android team', 'Anitas', 'Apollo XII', 'Around Jupiter', 'Big Data', 'Biking for rent', 'Bitcoins', and 'Black starts'. The 'AT RISK' projects include 'Big Data', 'Biking for rent', and 'Bitcoins'. The 'OFF TRACK' projects include 'Agapimu' and 'Biking for rent'.

Name	Status	Business goal	Budget	Incurrent cost	Priority	End date	Estimated time	Total time spent
ACME	PENDING	Market expansions	4,500	1,443.75 32 minutes ago	High	27/Oct/22	40w	2d 3h 15m 32 minutes ago
Agapimu	OFF TRACK	Decrease time to market	2,900	3,256.25 32 minutes ago	Trivial	31/May/22	3w 2d	1w 3h 25m 34 minutes ago
Android team	DONE	Customer retention	100,000	12,000 32 minutes ago	Medium	20/May/22	20w	4w 35 minutes ago
Anitas	ON TRACK	Increase revenue	450,000	311,906.25 32 minutes ago	High	28/Apr/22	120w	103w 4d 6h 45m 35 minutes ago
Apollo XII		Decrease time to market	90,900	73,200 32 minutes ago	High	28/Jun/23	161w 4d	24w 2d 35 minutes ago
Around Jupiter	ON TRACK	Market expansions	580,000	468,000 32 minutes ago	Trivial	01/Jun/22	8w	156w 35 minutes ago
Big Data	AT RISK	New products or services	120,000	6,000 32 minutes ago	Medium	30/Jun/22	1w	2w 35 minutes ago
Biking for rent	OFF TRACK	Increase revenue	23,400	14,400 32 minutes ago	Low	28/Jul/22	18w	4w 4d 35 minutes ago
Bitcoins	AT RISK	Customer retention	12,000	4,537.5 32 minutes ago	Blocker	26/May/22	4w 3d	1w 2d 4h 30m 34 minutes ago
Black starts		Increase revenue	70,000	50,175 32 minutes ago	Low	30/Sep/22	40w	16w 3d 5h 34 minutes ago

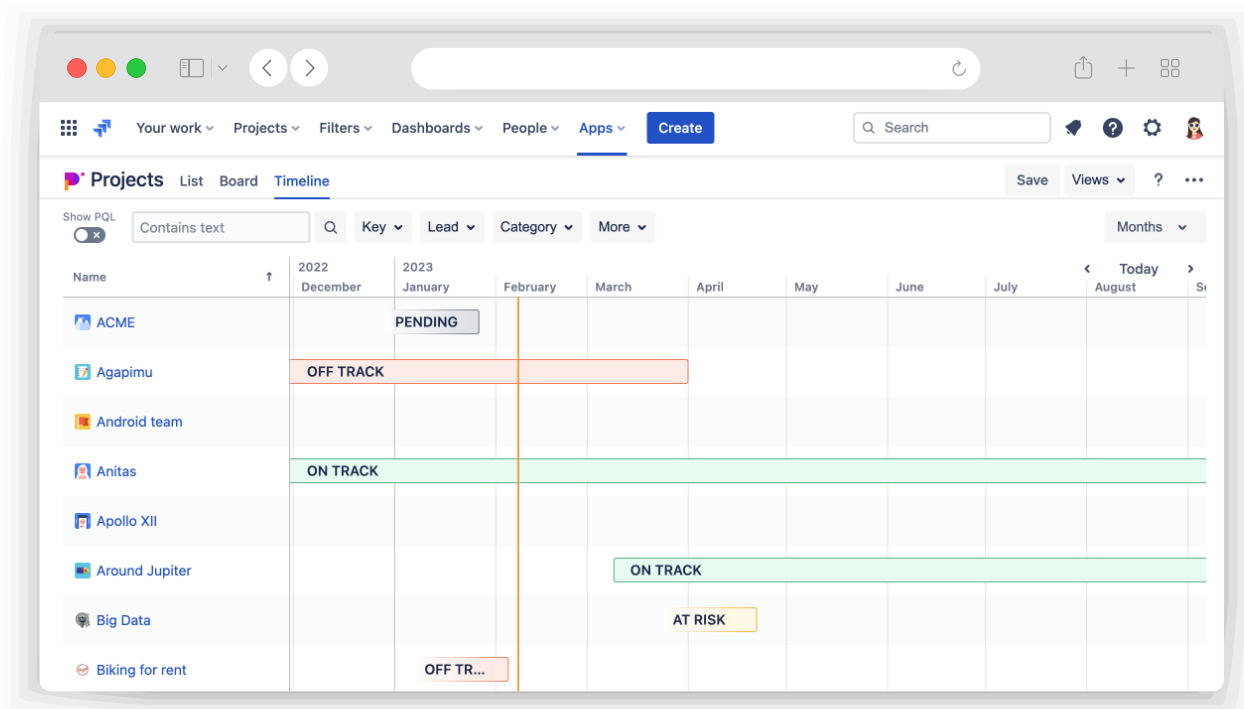
Step 4. Enable the asynchronous collaboration or update your project values directly in your follow-up meetings through the **Board View**.



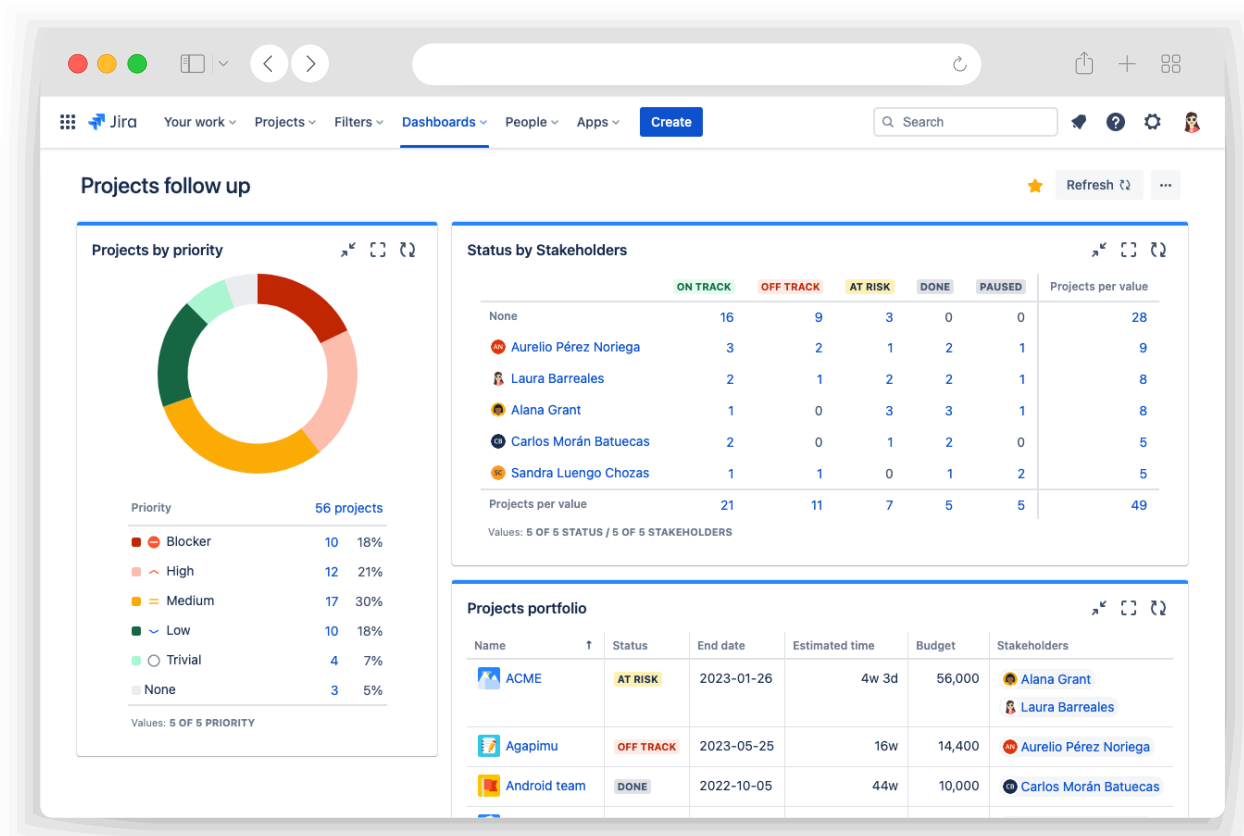
The screenshot shows the Jira Project Navigator in Board View. The interface includes a top navigation bar with 'Jira', 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. A search bar is on the right. Below the navigation bar, the 'Projects' section is active, showing a Kanban board with columns for project status: ON TRACK (17), AT RISK (5), OFF TRACK (9), DONE (5), and PAUSED (2). Each column contains a list of project cards. The 'ON TRACK' column includes projects like 'Anitas', 'Around Jupiter', 'Blue moon', 'COVIDIEN', 'Data Driven Design', 'Discovery', 'Experts on moon', 'Irom Quesahra Desert on the moon', 'Marketing creatives', 'Marketplace', and 'Marketing Blog'. The 'AT RISK' column includes 'Big Data', 'Bitcoins', 'Jose MKT', 'JSW1', and 'Main news Radio'. The 'OFF TRACK' column includes 'Agapimu', 'Biking for rent', 'Enterprise diamonds', 'Facilities support', 'Frozen', 'Global Domination', 'Pepe', 'Rocket to the moon', and 'Space exploration'. The 'DONE' column includes 'Android team', 'Celestial Coordinates', 'Double start', 'Gaming Network', and 'Marketing'. The 'PAUSED' column includes 'IOS team' and 'Mobile G4'.

ON TRACK (17)	AT RISK (5)	OFF TRACK (9)	DONE (5)	PAUSED (2)
Anitas	Big Data	Agapimu	Android team	IOS team
Around Jupiter	Bitcoins	Biking for rent	Celestial Coordinates	Mobile G4
Blue moon	Jose MKT	Enterprise diamonds	Double start	
COVIDIEN	JSW1	Facilities support	Gaming Network	
Data Driven Design	Main news Radio	Frozen	Marketing	
Discovery		Global Domination		
Experts on moon		Pepe		
Irom Quesahra Desert on the moon		Rocket to the moon		
Marketing creatives		Space exploration		
Marketplace				
Marketing Blog				

Step 5. Track and update the projects duration and have a big picture of your project **Timeline**.



Step 6. Visualize projects summary in Jira Dashboards by embedding **Projectrak Gadgets** and identifying project insights.



Users' results after Projectrak:

- 100% of success controlling project data.
- Saving tons of synchronous work and motivate asynchronous work.
- Updated project inventory in Jira.
- More control over the Jira projects by standardizing, organizing, and managing the chaos it supposes.
- Skyrocket Jira Administrator time productivity by saving time when documenting projects.
- Take your project information up a level.

Reasons why Projectrak users recommend it:

“ Amazing app and very easy to use. This fills the void that I had of wanting to track custom fields at a project level (requester, estimated cost and duration, status, etc.) I also love the "Project Navigator", which allows me to create various custom views. ”

Get data, keep control and lead your projects now!

Get a **free trial** of Projectrak Cloud at the Atlassian Marketplace and have a full picture of your project portfolio with just a quick look:

[Go to the Atlassian Marketplace](#)