

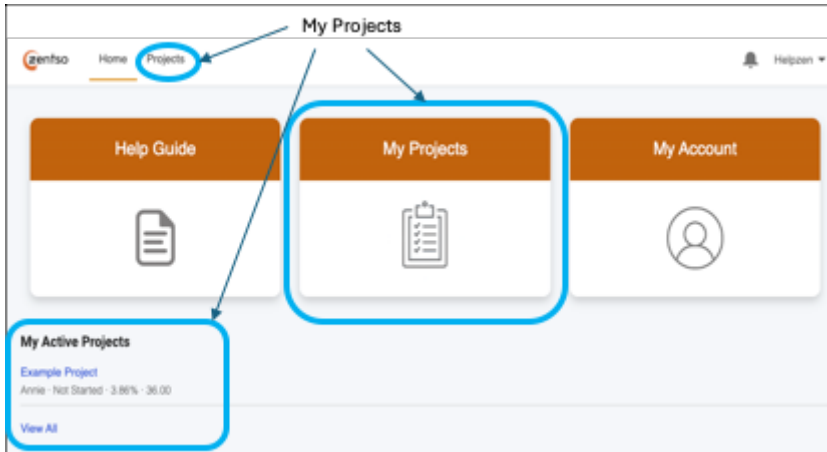
Yantra - Zentso Project Management System for Clients

This is a user guide for Zentso clients using the client portal

- [My Projects](#)
- [Workspace](#)
- [View Task Information](#)
- [Log a Task for Zentso](#)

My Projects

My Projects can be accessed from the Home Page as well as the navigation bar:



Selecting a Project will take you to the Project Information page:

The image shows the 'Project Information' page for 'Example Project'. The page header includes the project name, owner (Annie), and status (Not Started). Below this is a 'Workspace' tab and a navigation bar with various icons and filters. The main content is a table with columns for WBS, Projects & Tasks Name, Assignees, Start Date, Due Date, and Status. The table is followed by a Gantt chart showing the project schedule from 30 Sep to 06 Oct (week 40). The Gantt chart shows various tasks with progress bars and completion percentages.

WBS	Projects & Tasks Name	Assignees	Start Date	Due Date	Status
	Example Project		30/09/2024	29/10/2024	Not Started
1	Pre-Discovery		30/09/2024	30/09/2024	Not Started
1.1	Project Set up		30/09/2024	30/09/2024	Completed
1.2	Kick-off Meeting		30/09/2024	30/09/2024	Completed
1.3	Pre-Discovery Meeti	[P] Client Sponsor	30/09/2024	30/09/2024	Completed
2	Workshops		30/09/2024	30/09/2024	In Progress
2.1	Workshop 1		30/09/2024	30/09/2024	Completed
2.2	Workshop 2		30/09/2024	30/09/2024	Completed
2.3	Workshop 3		30/09/2024	30/09/2024	Completed
2.4	Workshop 4		30/09/2024	30/09/2024	Not Started
2.5	Workshop 5		30/09/2024	30/09/2024	Not Started
2.6	Workshop 6		30/09/2024	30/09/2024	Not Started
2.7	Workshop 7		30/09/2024	30/09/2024	Not Started
2.8	Workshop 8		30/09/2024	30/09/2024	Not Started
2.9	Workshop 9		30/09/2024	30/09/2024	Not Started
2.10	Workshop 10		30/09/2024	30/09/2024	Not Started
2.11	User Story write-up		30/09/2024	30/09/2024	Not Started
3	User Story Review		30/09/2024	30/09/2024	Not Started
3.1	Client to review		30/09/2024	30/09/2024	Not Started
3.2	Zeniso Amendments		30/09/2024	30/09/2024	Not Started

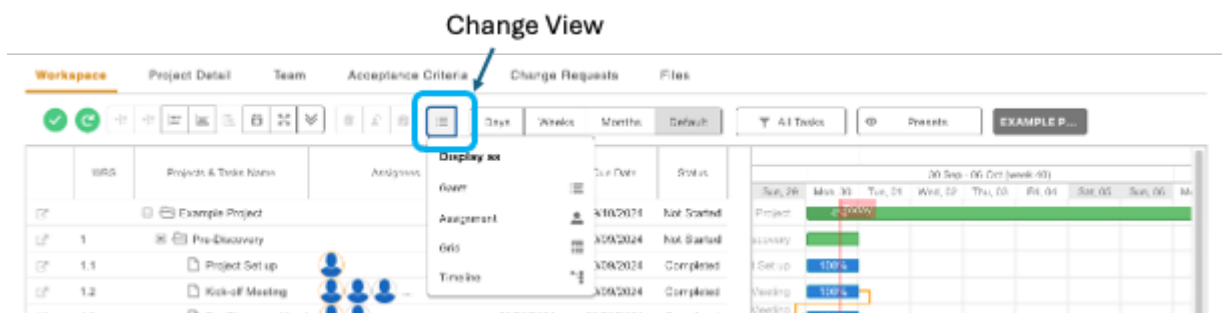
Workspace

The workspace shows a list of tasks and sub-tasks as well as associated dates and a status.

Changing the View:

The following views are available for the Workspace:

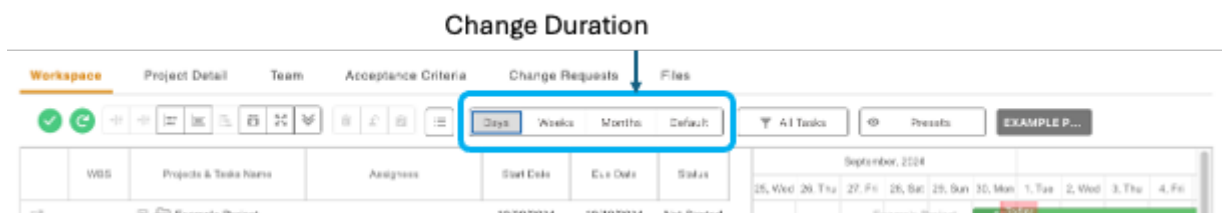
- Tasks only (Grid),
- Tasks and Gantt chart (Gantt),
- Gantt only (Timeline)



Changing Duration:

The following durations are available for the Gantt chart:

- Days
- Weeks
- Months



Filter:

Filters can be used to adjust the information displayed on the workspace:

Filter

The screenshot shows a project management interface with a table of tasks and a Gantt chart. A dropdown menu is open, showing various filter options. The 'All Tasks' option is highlighted. The table below shows a hierarchy of tasks under 'Example Project' and 'Workshops'.

WBS	Projects & Tasks Name	Assignees	Start Date	Due Date	Status
	Example Project		30/09/2024	23/10/2024	Not Started
1	Pre-Discovery		30/09/2024	30/09/2024	Not Started
1.1	Project Set up		30/09/2024	30/09/2024	Complete
1.2	Kick-off Meeting		30/09/2024	30/09/2024	Complete
1.3	Pre-Discovery Meeti		30/09/2024	30/09/2024	Complete
2	Workshops		30/09/2024	30/09/2024	In Progress
2.1	Workshop 1		30/09/2024	30/09/2024	Complete
2.2	Workshop 2		30/09/2024	30/09/2024	Complete
2.3	Workshop 3		30/09/2024	30/09/2024	Complete
2.4	Workshop 4		30/09/2024	30/09/2024	Not Started
2.5	Workshop 5		30/09/2024	30/09/2024	Not Started
2.6	Workshop 6		30/09/2024	30/09/2024	Not Started
2.7	Workshop 7		30/09/2024	30/09/2024	Not Started
2.8	Workshop 8		30/09/2024	30/09/2024	Not Started

Presets:

Presets can be used to save the selected; View, Duration and/or Filter options. Use the 'Save as' feature to save the preset.

Preset

The screenshot shows the same project management interface as above, but with a 'Preset' dropdown menu open. The 'Save as' option is highlighted. The Gantt chart shows a timeline from Sunday, 29th to Monday, 7th.

WBS	Projects & Tasks Name	Assignees	Start Date	Due Date	Status
	Example Project		30/09/2024	23/10/2024	Not Started
1	Pre-Discovery		30/09/2024	30/09/2024	Not Started
1.1	Project Set up		30/09/2024	30/09/2024	Complete
1.2	Kick-off Meeting		30/09/2024	30/09/2024	Complete
1.3	Pre-Discovery Meeti		30/09/2024	30/09/2024	Complete
2	Workshops		30/09/2024	30/09/2024	In Progress
2.1	Workshop 1		30/09/2024	30/09/2024	Complete
2.2	Workshop 2		30/09/2024	30/09/2024	Complete
	Workshop 3		30/09/2024	30/09/2024	In Progress

View Task Information

To view a task, navigate to the Project, then Workspace and click the 'Open Task' icon:

Open Task Icon

The screenshot displays a project management interface for 'Klient Project Example Project'. The top section shows project details: Owner (Annie), Project Status (Not Started), % Complete (3.86%), Estimated Hours (36.00), Estimated Project Hours, and Hours Remaining (Estimated) (0.00). Below this are navigation tabs: Workspace (selected), Project Detail, Team, Acceptance Criteria, Change Requests, and Files. A toolbar contains various icons for task management. A table lists tasks with columns for WBS, Projects & Tasks Name, Assignees, Start Date, Due Date, and Status. The 'Workshops' task (ID 2) is highlighted in yellow. To the right, a Gantt chart shows the project schedule from Sunday, 29th to Sunday, 6th, with progress bars for various tasks.

WBS	Projects & Tasks Name	Assignees	Start Date	Due Date	Status
	Example Project		30/09/2024	29/10/2024	Not Started
1	Pre-Discovery		30/09/2024	30/09/2024	Not Started
1.1	Project Set up		30/09/2024	30/09/2024	Completed
1.2	Kick-off Meeting		30/09/2024	30/09/2024	Completed
1.3	Pre-Discovery Meeti		30/09/2024	30/09/2024	Completed
2	Workshops		30/09/2024	30/09/2024	In Progress
2.1	Workshop 1		30/09/2024	30/09/2024	Completed
2.2	Workshop 2		30/09/2024	30/09/2024	Completed
2.3	Workshop 3		30/09/2024	30/09/2024	Completed
2.4	Workshop 4		30/09/2024	30/09/2024	Not Started
2.5	Workshop 5		30/09/2024	30/09/2024	Not Started

The Task page provides information about a selected task e.g., number of hours logged, number of hours remaining, task status, QA and UAT information.

Comments

Comments can be added to a task using the 'Post' feature:

IMPORTANT: You will need to @mention the contact, so they are notified of your comment.

Project [Example Project](#) Billable Milestone? Hours Remaining (Logged) 0.00 Owner [Annie](#)



* = Required Information

Task Name Workshops	MuScoW*
Project Status Not Started	Priority Normal
Sprint*	Due Date 14/10/2024
Task Health*	% Complete 27.00%
Complexity Medium	Estimated Hours
Description	
Details	
Proposed Solution	
Testing	
QA Status Ready	UAT Status
Time	
Total Logged Hours Including Sub-Tasks 0.00	Hours Remaining (Estimated) 0.00

Post

This is a comment

B I U

To: Workshops

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Search this feed...



Log a Task for Zentso

Login page: <https://zentso.my.site.com/>

To log a task for Zentso, navigate to the Project and select 'Log a Task':



Fill out the task information and press Next to add files or images:

Log a Task

* Task Type ⓘ

Issue

* Subject ⓘ

* Priority ⓘ

--None--

* Steps to reproduce issue: ⓘ

* Expected behaviour: ⓘ

Next

The task will appear at the bottom of the Workspace and Zentso will receive a notification and assign the task to a member of staff.

Best Practices

What type of task is it?

You will find the following choices when you log a task in Yantra:

- Issue
- New report functionality
- Bigger project/new implementation

Process for issues, small tasks:

Create a new task in Yantra. Give as much information as possible about what the issue is/what you require to be done.

What to include:

- The process that you have followed. More information is best! As much detail as possible. Assume that the consultant picking up the ticket has no prior experience of the environment (but knows your CRM)
- Screenshots. Quick. Easy. Efficient.
- Error messages – text or screenshots.
- URLs – specific links of where the behavior is occurring (or should occur).
- Screen recordings of specific scenarios. It allows us to easily replicate and then investigate.
- Sample IDs to use for testing.
- Who the user is logged in as.
- Which browser are you using.

Provide acceptance criteria for completion. It may be obvious, “fix it!”

1. When you have submitted a task, a default one hour investigation time will apply (unless you have specified differently). Usually, we would expect around an hour is sufficient. We can then inform you of our findings and how long (if required) it will take to complete the task and ask for your approval. In some scenarios our investigation will find that it is a product issue, in which case this should be logged with the product provider.
2. You sign off on an estimate if you want to go ahead with the proposed work.
3. We undertake the work. Before we get this back to you, we will test. If we take longer than has been estimated, we will come back to you for approval of more time and an explanation of why more is required. Please note, on occasion we may continue with work before requesting more time due to time sensitivity.
4. We expect testing to occur on both sides. Sometimes this is iterative, so it may go back and forth depending on the issue. We will aim to have it right the first time!
5. Once accepted by the client – this is completed and we will close ticket. If we do not hear from you in a reasonable period of time we will consider it complete.

Process for bigger/project pieces of work/new developments (c.20 hour projects)

For bigger pieces of work, you may want to consider contacting your account manager directly to discuss any upcoming work you may require.

We would need to know:

A clear scope of what you require to be developed or changed by Zentso.

What we'd like to see:

- Business context (the purpose, how it came about, why!)
- Desired outcome
- Dependencies between the task and other tasks - if known
- Enough information to assess the risk before starting the work - if known

Please also provide timeframes for when the work is required by (if applicable).

For larger pieces of work, Zentso will spend some time to propose a solution and an estimate how long it will take to complete this. The amount of time to do this will depend on the size of the project/request itself. Work required to analyse the level of effort required is billable.

Please do not:

- Email us with tickets - use Yantra, unless it is an emergency!
- Conflate tickets
- Duplicate tickets
- Give us limited information