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Web Information Center
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Getting Started with Web Information Center

Web Information Center is a team portal that allows companies to manage their projects, customer relationships (CRM) and customer support issues quickly and effectively.

Powered with tools for managing project deliverables combined with collaborative features like team calendars, document sharing, threaded discussions and graphical dashboards, teams begin communicating and providing better service to their customers.

> Web Information Center streamlines projects, improves customer satisfaction, and makes our company more competitive. The ROI on this product is huge.
> **-Robert Rockwell, VP of IT, Village Homes**

The CRM feature offers the ability to import contacts, create email templates and send out email campaigns to your opt-in contacts. As email recipients click on links within the email, you are notified via email and a campaign report shows the number of people that opened the email and the people that clicked on each link within the email.

Step 1 - Setup Security Groups

Web Information Center has a robust security model that allows you to create groups of users (like Project Managers, Sales Staff, Business Analysts, etc). Upon creating a security group, you can then decide what rights that group of people have (for example, you can provide read-only to project management, read/update but not delete to the contact manager, full access to discussion forums). To create a security group:

1. Click **Setup | Security | Security Groups**
2. Click **Add New** (top right of page), give the new security group a name (e.g. Programmer Group), Submit.
3. Click **Privs** next to the group, and choose what rights you wish to apply to this group.
4. Movie: http://www.pragmaticsw.com/Movies.asp?Topic=ManagingUserSecurity

Step 2 - Add Users

Adding a new user is simple. Upon adding the user, the user automatically receives an email letting them know how to login and begin using the product. Here's how you add a new user:

1. Click **Setup | Security | Users**

2. Click **Add New** (top right of page), enter the user details and choose a Security Group, press Submit.

Step 3 – Track Contacts

Tracking contacts is important for sales lead prospecting and customer relationship building. Web Information Center allows sales team to enter their sales leads and track the status of each lead. Notes regarding the call history and conversations are stored with each contact, allowing sales managers to quickly see the state of any sales lead. Proposals, contracts and other documents can be attached as files to a contact, making all artifacts accessible from a single click.

1. Click the **Contacts** tab.
2. To add a new item, click **Add New**. To edit an item, click the **Edit** button. To delete an item, click the **Edit** button and choose **Delete** from the bottom of the screen.
3. To search for items, enter a phrase in the **Quick Search** area. To save a filter for repeated use, click the **Filter** button, enter your search criteria, and give it a friendly name for later use.
4. To run reports, click **Reports**
5. For workflow, click **Contacts | Edit | Choice Lists | Workflow and State Transitions**.
6. Movie: http://www.pragmaticsw.com/Movies.asp?Topic=Contacts

Step 4 – Manage Email Campaigns

Email campaigns all your marketing team to create professional designed email templates and send out email campaigns to prospects in your contact list. As emails are sent, Web Information Center tracks who opened the email and what links within the email were clicked. Importing your contacts from other software is easy; just follow the import wizard instructions.

1. Click the **Contacts** tab.
2. To create an email template, click the **Send Email** button.
3. To define a new template, click the **Templates** link, then click the **Add New** link.
4. Enter a **template name** (e.g. Prospect first email), enter a **subject** for the email and then use the editor to design your email. If you prefer to use an HTML editor locally, you can copy the HTML then press the <> button on the editor to paste in the HTML. Or you can simply use the editor to design your email template.
5. If you wish to insert mail merge fields (like the contact's name, etc), there are tokens on the right side of the screen. Copy a token name then paste into the template at the correct position.
6. One you are done, save the template by pressing SUBMIT.

7. To send out an email campaign, click **Contacts.** If you wish to send it to specific individuals, use the **Filter** button to refine the list of recipients. Once that is done, click **SEND EMAIL**. If you wish to schedule the email for later, click the **Send this email at a later date** link and choose the date and time. Then press **Submit**.
8. Once the email is sent, any time a contact clicks on a link within the email, you will be notified via email letting you know who clicked each link. You can view complete statistics for each email campaign by clicking **Reports** and choose the **Campaign Report**.
9. Movie: http://www.pragmaticsw.com/Movies.asp?Topic=EmailCampaigns

Step 4 – Project Management

Use the Project Management features to manage your project deliverables. Choose from simple or advanced project management, based on your needs. Create project plans and assign tasks to team members. As team members log time towards deliverables and percentage completes are entered, the project manager can be alerted via email. Use our graphical reports for analysis and review.

1. To use our Advanced Project Manager, click **Project Management | Project Plans | Add New** to add a new project plan**.** From here, create your project task hierarchy and assign tasks to team members. Team members will log in and click **Project Management | My Hours** to allocate time against assigned tasks.
   Movie: http://www.pragmaticsw.com/Movies.asp?Topic=ProjectPlans
2. If your project management needs are simpler, **click Project Management | Quick Tasks | Add New** to add tasks for team members. Team members will log in and edit tasks assigned to them and allocate time by clicking **Edit | Costs**.
   Movie: http://www.pragmaticsw.com/Movies.asp?Topic=ProjectTasks

Step 5– Manage Your Calendar

You can easily manage your calendar (appointments, to do lists, etc) and synchronize the calendar with your local MS Outlook calendar. You can share your calendar with others on your team.

1. Click **Home | Calendar.**
2. To add a new item, click **Add New**. To edit an item, click the appointment name. To delete an item, click the appointment name and choose **Delete** from the bottom of the screen.
3. To see your appointments in **Daily** or **Weekly** view, choose the options from the top of the screen.
4. To set a recurring appointment (like a weekly meeting), click the **Recurring Event** icon next to the appointment name.

5. To invite others to a meeting, click the **Invite Others** icon next to the appointment name. From here, choose the people you wish to invite, their schedule will be shown. Confirm the meeting by pressing **SUBMIT**. Once they have been invited, they will be sent an email with the invitation, where they can accept, decline or mark the meeting tentative.
6. To add **To Do List** items, click the **To Do** button at the top of the page.
   Movie: http://www.pragmaticsw.com/Movies.asp?Topic=Calendar

Step 6 – Eliminate FTP with Shared Documents

Eliminate all your FTP sites with the Shared Documents feature. This feature allows creation of folders and subfolders and storing documents in those folders. Unlike FTP, folders can be company wide or project specific and you can allow certain people to access certain folders but not others. You can also specific what level of rights each person has to folders. Use our drag-and-drop interface to upload and download documents in bulk. Alert people via email as documents are changed.

1. To add a new folder, click **Collaboration | Shared Documents | Manage Folders | Add New.**
2. To upload files into a folder, click **Collaboration | Shared Documents | (Choose a Folder).**
3. If you wish to use drag-and-drop, click **Actions: Turn Drag & Drop On**
4. To upload documents, click **Upload Wizard,** choose the people to notify via email, click **Add…** or drag and drop files to the white area of the canvas, press **Start Upload.**
5. To upload documents, click **Upload Wizard, choose** the people to notify via email, click **Add…** or drag and drop files to the white area of the canvas, press **Start Upload.**
6. To download documents, click **Download Wizard,** choose choose the location on your hard drive to save the document(s), choose the files to download, click **Continue**.
7. Movie: http://www.pragmaticsw.com/Movies.asp?Topic=SharedDocuments

Step 7 – Create Knowledge Bases and Custom Lists

For teams that need to track knowledge base articles or create custom lists (like hardware asset lists, birthday lists, etc.), use the List Manager. The List Manager allows defining of custom sets of information, the ability to secure the list so that only certain people have rights to it, the ability to run reports, and the ability to create custom email alerts for the list.

1. To add a new list, Click **Lists | Manage Lists | Add New.**
2. Type in the name of the list (for example Knowledge Base), choose how to separate the data, press **Submit**.
3. Click the **fields button** to define the fields. Click **Edit** next to **Field1** to set up the field. Do the same for the other fields you wish to define. For example, for a knowledge base, you might

create a field for the KB Topic, KB Question, KB Answer, and Status. Note that you can create different field types (text, date, list of values, etc).

4. To secure the list, click **Setup | Security | Security Groups**. Click the **Privs** button for each security group, check **Read/Add/Update/Delete** options for the new list.
5. You will notice a new item in the Table of Contents called Lists. Under this area, you will see the list you created. To add a new item, click **Add New**. To edit an item, click the **Edit** button. To delete an item, click the **Edit** button and choose **Delete** from the bottom of the screen.
6. To search for items, enter a phrase in the **Quick Search** area. To save a filter for repeated use, click the **Filter** button, enter your search criteria, and give it a friendly name for later use.
7. To run reports, click **Reports | Ad-hoc Summary or Ad-hoc Detail Reports**. You will see reports for your new list.
8. Movie: http://www.pragmaticsw.com/Movies.asp?Topic=ListManager

Step 8– Track Issues

Track customer and support issues to ensure that the critical ones are addressed first. Take advantage of our configurable workflow engine to create custom statuses and to regulate how one status can transition to another, and what fields of information are required, hidden, and/or locked for data entry. Use our graphical reports for analysis and review.

1. Click the **Issues** tab**.**
2. To add a new item, click **Add New**. To edit an item, click the **Edit** button. To delete an item, click the **Edit** button and choose **Delete** from the bottom of the screen.
3. To search for items, enter a phrase in the **Quick Search** area. To save a filter for repeated use, click the **Filter** button, enter your search criteria, and give it a friendly name for later use.
4. To run reports, click **Reports | Issue Reports**
   For workflow, click **Issues | Edit | Choice Lists | Workflow and State Transitions**.
   Movie: http://www.pragmaticsw.com/Movies.asp?Topic=Issues

FAQs and Tips and Tricks

1. Can we archive projects upon completion (but not wipe out the data)? Yes, click **Setup | Projects (Open & Create) | Edit** the project to archive. Uncheck **Active Project?** Log out, back in, the project is hidden until this setting is turned back on. All your data is kept in tact.
2. Can we import data? Yes, click **Setup | Import | Import Wizard,** choose the area to import, choose a comma separated file (CSV) from your hard drive, map the fields, press **Submit**.
3. Can we export data? Yes, click **Issues** (or the area you wish to export), click **Actions | Export** link.
4. Can we attach files to records? Yes, click **Issues** (or the area you wish), click **Edit | Files | Add New**.
5. Do you keep an audit trail of changes? Yes, click **Issues** (or the area you wish), click **Edit | History**.
6. Can we create our own custom fields? Yes, click **Issues** (or the area you wish), click **Edit | Custom Fields**. You can also use this screen to set the screen layout preferences.
7. Can we define our own choice lists? Yes, click **Issues** (or the area you wish), click **Edit | Choice Lists**.
8. Can we quickly sort lists of information? Yes, click **Issues** (or the area you wish), then click on the row header for any column. Click once for ascending order, again for descending order. For multiple field sorting, click **Actions | Sort** button at the top of the page.
9. Can we setup email alerts? Yes, click **Home | Email Alerts.** From here you can specify the alerts you wish to receive. Click **Add New** to define new alert types.
10. Can we associate notes with records? Yes, click **Issues** (or the area you wish), click **Edit | Notes | Add New**.
11. Can I see just the items assigned to me? Yes, click **Home | Inbox**.
12. Can we manage our help desk? Yes, see http://www.pragmaticsw.com/SupportManager.asp.

Getting Additional Help

If you need additional help, contact us at +1 303.768.7480. We have free support at http://www.PragmaticSW.com/Support. From here you can search our knowledge base, enter a support ticket, and track the status of any outstanding tickets.

We also offer training classes, see our training offerings at http://www.PragmaticSW.com/Services.asp.