Vancouver IT Services, Inc.

GoalsOnTrack User Manual

Version 1.00

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Introduction

GoalsOnTrack is a web-based goal setting and task management application, designed to help you accomplish both personal and professional goals. It's an integrated tool that allows you to set SMART goals, visualize your accomplishment, create supporting tasks, manage your time, track progress, motivate yourself, and keep things on track via goal journaling.

Getting started

Login

After you sign up, you will receive your username (your email address) and password. There are two links where you can sign in to the site:

1. Normal Login: http://www.goalsontrack.com/login
2. Secure Login: https://secure.goalsontrack.com/login

Either way, you will be logging into the same account on the same site. The only difference is that "Secure Login" is accessed via SSL HTTP connection, which means all data transmitted between your computer and the web server you log on to is encrypted. However, some people prefer "Normal Login" as it is usually a bit faster than "Secure Login".

First steps

When you sign in for the first time, there is nothing yet under your account. This is the time you need to setup a few things to get started, such as creating a goal, adding some tasks, etc. However, since you're just getting started, it makes sense to create a test goal and maybe enter some test data, just to familiarize yourself with the tool. You may want to follow the first few steps below to get started:

1. **Create a goal**
   Click on "Goals" tab, then fill out the "Goal Name" field, pick a "Deadline" date, the click "Create this goal" button.

2. **Add tasks for a goal**
   Click on "Tasks" tab. Under the goal you've just created, click on "+ Add a task" link. Enter the task name and set due date (here it usually means on what date you will do this task) to "Today", then click on "Create this task" button. Repeat this step to add a few more tasks.

3. **Complete a task and view progress**

Click on "Dashboard" tab. You will see your goal listed under "Active Goals", and its supporting tasks scheduled as "Due today". Now to complete a task, click the checkbox before a task name. You will see a prompt box asking what progress, and how much time you spent on them. Enter a percentage (i.e. "10"), and click "Complete". You will see the task is now listed under "Completed today" section, and your goal's progress is updated.

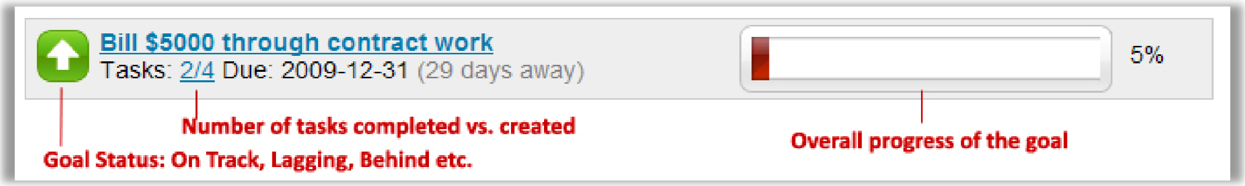
Repeat the above steps to do a few more goals and tasks, and you will get the general idea of how the tool works for adding goals and tracking tasks. Then you can proceed to remove your test data, and be ready to create some real goals for yourself.

Dashboard

The first screen you see after logging in is the Dashboard page. This is the page that displays all your active goals and due tasks, and some stats for your work day.

Active Goals

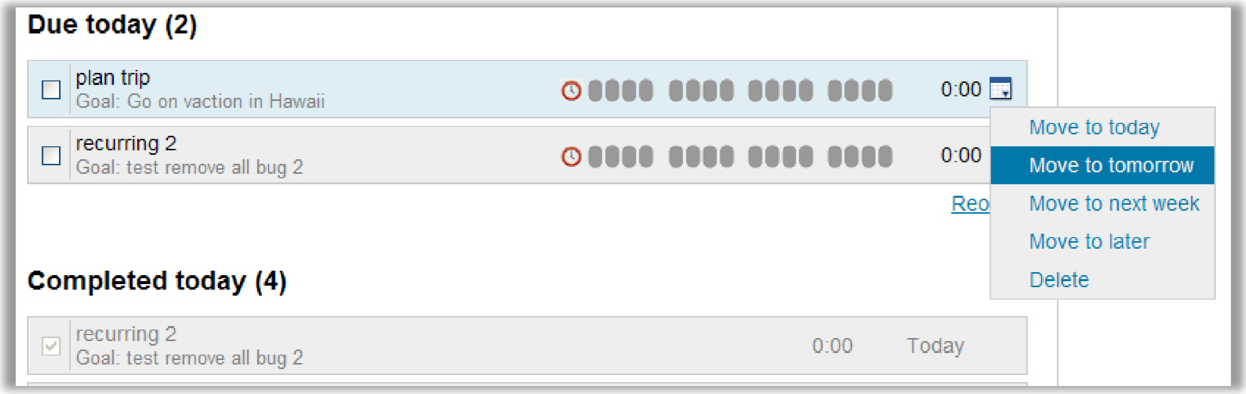
This section shows all your active goals and their status and progress information. An "active goal" means a goal that has been created, not yet accomplished, or back burned.



As seen from the illustration above, each goal has its status, task counts, due date, and overall progress. This information changes as you complete the tasks for a goal, and it gives you a bird-eye view of how you are doing with each of your active goals.

Tasks: Today, Yesterday, Completed, etc.

To accomplish any goal, you must do something. This "something" is the tasks or actions you take that move you toward your end goal. Under the "Active Goals" section, the Dashboard page shows you exactly what tasks you've scheduled for today, tomorrow or this week etc. This is also where you should plan your day and check off the tasks as you complete them.



Each task has its own time tracker and quick menu to re-schedule it to some other date or simply remove it.

For overdue tasks (which aren't completed yet after their due date), they will be showed in a different section, where you can quickly reschedule them to today, or later.

Stats and Navigation

As you work on your tasks and goals, the system keeps track of how much time you spent, and gives you a quick view of stats on hours worked and tasks completion status.

In addition, you can selectively view only goals of a particular category, or tasks schedule for a certain date(s). By default, the Dashboard will display "All" goals for "Today". To change this default view, simply click on a goal category, and/or an item under "My Tasks" heading.

Day Planner

For some people, it is always easier to have a list of goals and to-dos on paper and take it with them as a reference. GoalsOnTrack has a feature that allows you to print out your goals and tasks in a "daily planner" format.

When you click on "Print Day Planner" button, it will open up a new window with all your active goals and tasks currently shown on dashboard. To print only tasks, without goals, simply move your mouse over "Active Goals" title, and click the "x" link.

Beside each task on planner sheet, there are a series of small circles. Those are the time trackers that can help you keep track of how much time you spend on each task. Simply fill these circles up with a pen, when you check off a task. In current format, each circle represents 15 minutes.

Goal management

One of the most important things to accomplishing your goals is to be able to find a way to effectively manage them and keep yourself on track. GoalsOnTrack provides many useful features to help you with this.

Create a SMART Goal

Setting a SMART-based goal is a great way to start right with accomplishing what you want to achieve. A SMART goal means, Specific, Measurable, Achievable/Attainable, Realistic, and Timely.

Click on "Create Goal" button, and simply answer the questions for each field on the goal creation form, and you will be creating a SMART goal. Please note that you can always come back and edit the information you entered here.

Goal Progress

When you create a goal, you should set a "Progress Metric". The software will use the information you entered here to track your goal's progress. There're three types of data you can set for this field, and your goal progress will be tracked differently:

1. **Blank (default)** - If nothing is set for this field, the program will set "100%" as the default value. Whenever you complete a task for this goal, it will ask you what percentage completing this task will contribute to its goal completion.

2. **A sentence (text)** – If you set the end result as something of a textual content, such as "Product is launched", "I bought the house" etc., the goal progress will be measured by the number of tasks completed over total number of tasks created.

3. **A numerical value (number)** – If you enter something such as $1000, 200 orders, etc., your goal progress will be measured by that. Whenever you complete a task, it will prompt you to enter the amount accomplished by completing that task.

Please note that your goal progress is only updated when you complete a task, and that's the only way to do it. This forces you to take actions upon your goal. However, if there is a situation where the goal progress is automatically updated, without any action being taken on your end, you can simply create a quick task, say "update goal status", and then update the goal progress accordingly.

Manage Your Goals

View by status

The goals you created are grouped into 3 different types, active goals, accomplished goals, and back-burned goals. A back-burned goal is a goal that you don't want to work on for now, but perhaps to revisit in future. On "Goals" page, you can view goals by these 3 different groups. Each page will display up to 5 goals, and there are pagination links at the bottom if you have more than 5 goals.

View by categories
You may also want to see your goals by different categories you assign to them. Click on items under "Categories" heading to display goals that are grouped into just that category. You can assign whatever different categories as you wish.

Reorder goals
Goals are displayed in the order of the time they are created. To change this order, click on "Reorder Goals" button, and drag and drop the goal titles to sort them into the goal you want. Then click "Done reordering goals" button. The active goals are also displayed in the same order that they're shown on "Goals" page.

Upload pictures for goals
You may want to assign a picture for your goal to help you visualize and motivate yourself to achieve it. On "Goals" page, click on "Change Picture" button, or the default goal picture icon, you will see a gallery of default pictures already loaded for your goals. Pick on from this set, or you can upload a picture of your own. Please note acceptable picture formats are JPEG, GIF and PNG files.

Vision Board
Another way to help you visualize your goals is to have a vision board where you can constantly see the pictures of your goals that you want to accomplish. To do this, simply click on "Vision Board" button on the top of the page. It will open up a new browser window.

It's recommended to maximize this window to better see the slideshow of the goal pictures. Vision board has several transitional effects for in-between your goal pictures. They are randomly used every time you run the vision board.

Vision board requires Flash installed on your browser. It should be installed by default on most recent versions of browsers. However, if you don't have it on your browser, you can install it from http://get.adobe.com/flashplayer/.

Task and time management
Two of the most important factors in whether you can accomplish a goal or not are what kind of actions you take and how well you manage your time. GoalsOnTrack is designed to achieve goals through effective action taking and efficient time management. It provides many useful features to support your task management for both your personal and professional goals.

Task views

Default view
By default, when you come to "Tasks" page, it shows you tasks scheduled for all your active goals. Under each goal, it lists 10 most recent tasks created, and more is accessible via the "More" link.

View by Category
You may choose to see only tasks for a specific type of goals. You can do this by clicking any of the navigation items under "View by Category" heading on the right. Your choice is remembered, so that next time you come back to "Tasks" page via the top main tab, this will be your default view.

View by Date
You may also want to view tasks scheduled for a certain period, such as Toady, This week, This month etc. To do this, click on items listed under "View by Date" heading.

View by Goal
You can see all the tasks for a single goal. Click on the goal title when you're on "Tasks" page. This view separates tasks into two groups, "Active" and "Completed tasks. Switch between the two views by selecting the menu item under "View by Status" heading on the right.

Manage tasks

Add/Edit tasks
To add a task, click "+ Add a task" link just below the tasks listed for a goal. A in-place task form will slide open and ready for your input. Here are some explanations about those fields on this form:

- **Task name** – name of your task (recommend using "verb + noun" form)
- **Due date** – the date when you want to complete this task (A task should not take more than a day, otherwise, they should be further be broken into sub-tasks)
- **Tags** – list of tags for this task. They will be displayed on dashboard as markers on your tasks
- **Priority** – high, medium, low. You can also create priorities by reordering them on dashboard
- **Progress** – this field should be left blank when you're just creating a task. When you complete a task, depending on what kind of goal it is, you may be asked to enter value for this field.
- **Time spent** – same as "Progress" field, you may only enter data for it when you complete a task.
- **Recurring days** – If this task is going to repeat, select the day of week it recurs.
- **Stop recurring by** – by default it's the goal deadline, but you can change it some earlier date.
- **Note** – additional information about the task.
- **Goal** – select another goal if you want to move the task to be under another goal

The fields in dark blue color are optional, and by default hidden on the form. You see those fields by clicking the "More fields" link at the bottom.

To edit a task, click the "pen + write pad" icon on the right of a task row. You will see basically the same form as you see when creating a task. Make changes as needed, and then just click "Save" to update a task.

Complete tasks
You can complete a task by checking the checkbox right before the task name. Depending on the task's goal, you may be prompt to enter data for the progress completing this task made toward its goal. Also

you may write in how long completing it took you. If you've used time tracker for this time, the time field is automatically filled for you.

You may complete a task on "Dashboard" page, or "Tasks" page, or "Goal Dashboard" page. Once a task is completed, its goal status and progress are automatically updated. On dashboard, your work status is also updated to reflect your hours and performance.

Once a task is completed, it will disappear from "Tasks" page, or moved to "Completed" section on "Dashboard" page. To "un-complete" a task, go to the Tasks page for that goal, and click "Completed Tasks" on the right, and then uncheck the "checkbox".

Remove or reschedule tasks

To remove tasks one by one, you can simply click the "X" button on the far right end of a task row. To remove multiple tasks at once, first go to the "Tasks" page for a particular goal. At the bottom, click "Remove all" link, and this will remove all tasks shown on current page and any tasks beyond this page.

To reschedule a task to a different date, click on the "calendar" icon, and choose from the popup menu.

Please note that removed tasks cannot be restored.

Track time

It's recommended you use time trackers on "Dashboard" page to track time spent on all your tasks. This not only gives an accurate report of how much time you spend on each task, but also shows you other time usage reports by goals, categories, tags, etc.

To start the timer for a task, click on the small "clock" icon before the gray dots. While the timer is running, these gray dots start to get filled up in color green. Each dot represents 15 minutes, so on Dashboard it can show you the timer progress for up to 4 hours.

To stop the timer, just click the "clock" icon again. You can start, stop, restart a timer any number of times you want. The total minutes will always be tracked.

When a task is completed on "Dashboard" page, it will show its total time.

Create priorities via "Reorder" link

On "Dashboard" page, you can quickly assign priorities for your tasks by sorting them into a new order. To do this, click on "Reorder" link at the bottom right of the "Due today" section. Then all tasks are in color yellow, indicating they're in sorting mode, simply drag and drop them to create a new order. Finally click on "Done" link to save your new priority order.

Habits tracker

Forming great habits is a effective way to make behavioral changes required by your goal. With Habits Tracker, you can easily setup habits that you want build and keep them on track.

Add/Edit/Remove Habits
Managing a habit is a very straightforward process. To add a habit, click on "+ Add a habit" link at the bottom of the habit list. To make changes, simply click on a habit's title link. To remove a habit, click "Delete" button on edit habit form.

Track habits
After a habit is created, you should use the weekly calendar to mark on the days that you've kept that habit. To check a date, simply click on an empty green cell for that day on calendar. To remove a check, click on the check mark itself and it will be removed.

As you add/remove check marks for your habit, your progress is automatically tracked by the software. It also shows you how many checks you've marked, and how many days have passed since you created that habit. And based on these numbers, it can calculate an estimated "strength" of your habit on a percentage basis, where 0% meaning no habit is formed at all, and 100% meaning the habit is totally formed and you should expect to own that habit without any intentional effort.

Habit strength
The habit strength is calculated from three numbers:

1. Total number of checks
2. Habit repetition times per week
3. 21 consecutive checks for forming a habit

For example, for a daily habit to form 100%, you will need to mark 21 consecutive checks over the last 21 days. For a weekly habit, they have to be marked within last 147 days (7 x 21 = 147). For a habit repeating 3 times per week, you will need to mark 21 marks over the last 49 days (7 x 21 / 3 = 49), so on and so forth.

However, you don't need to remember how it's calculated. Simply by checking the percentage and the status icon, which is filled up more as the habit strength grows, you will know how strong you habit.

Journal
Keeping a journal about your goals is a great way to keep yourself accountable and motivated while you are the journey of goal accomplishment.

Manage journal entries
To view your journal entries, click on the "Journal" main tab and by default it shows you all the entries you've made for all active goals. Each page displays up to 5 entries. To view additional entries, click on the pagination links at the bottom.

To add a new entry, click on "Post new entry" button at the top title bar. Only thing required for an entry is the content field, the rest are all optional. There's no hard limit on the size of your entry, but better to keep it within reasonable length.

To edit or remove an entry, click on the "Edit" or "Remove" links next to the entry title.

Views and search archives

You may choose to view only entries for a particular goal, by selecting a goal from the dropdown list on the title bar.

You may choose to see only entries from a particular month, by clicking on a month link under "Archives" heading on the right column of the page.

To search for a particular entry, you can type in your search keywords in the search box above the "Archives" heading.

If your entries have tags entered, you may also see entries under a tag by clicking on a tag link.

Confidentiality

All journal entry data stored on server is encrypted, meaning that even our web masters or technical staff cannot view your journal. When you see a journal entry, it has been temporarily decrypted and displayed back to you so that only you can view its content. This ensures the maximum privacy of your journal data.

Reports

There are two kinds of reports available in the software, goal progress reports and time usage reports. By regularly reviewing these reports, you will have a better understanding of your performance with goals and how well you manage your time.

Progress reports

Click on "Progress" tab and you will view the progress charts for all your active goals, over different periods of time. The charts show you how much progress you've made with a goal, over a selected period, such as this week, last 2 weeks, or this month etc. It is a cumulative chart meaning when you are near the completion of your goal, your chart will fill up to 100% mark on the right.

To view the charts for different periods, select the items from under the "Periods" heading on the right.

Time usage reports – by goals

Time usage reports by goals show you how much time you've spent on different goals, and their percentages of your total time allocation. Each goal is represented with a different color.

Time usage reports – by goal categories

Time usage reports by categories show you how much time you've spent on different categories of goals, and their percentages of your total time allocation. Each goal category is represented with a different color. This report can usually indicate how balanced you are with your life. Ideally, each main category of your goals should have equal amount of your total time allocation.

To view the pie charts for different time periods, select the items from under the "Periods" heading on the right.

User settings and customization

Change account info

Click "Account Info" link under "Edit Settings" heading. Please note that the "Time Zone" field will determine what time you receive reminder emails.

Change login password

Click "Login Password" link under "Edit Settings" heading. Your new password will be effective next time you login.

Change page titles

Click "Page titles" link under "Edit Settings" heading. The "Main Title" is what shown on the top left of the page in bold letters. The "Sub Title" is what's displayed on the top right of the page with a smaller font. This can be a motivational quote, etc.

Customize email reminders

Click "Email Reminders" link under Edit Settings" heading. You can choose to receive email reminders on your goal and task summary, and our newsletter.

Import tasks from other software

You may want to import tasks from other software programs, such as Outlook, Google Calendar etc. First you will need to export the tasks data from these programs to a file. Then you just upload this file to GoalsOnTrack. After it's successfully uploaded, you can selectively import only those tasks you want to import for your goals. For details, please follow the instructions on that page.

Export tasks data

Click "Export Tasks" link under Edit Settings" heading. You then choose which goal you want to export data from. Also select if you want to export all tasks, or only uncompleted tasks. The exported tasks data is in CSV format, and can be easily processed by most software programs.

Member bonuses

Here you can access and download member-only materials, such as e-books, special reports, etc.

Tech support

If you have any questions that this document hasn't covered, please contact our technical support at support@goalsontrack.com, or send your feedback at http://www.goalsontrack.com/index/support.

We periodically publish useful information related to our website and products on our blog, such as site updates, articles, feature demos, tutorial videos, etc. Please visit our blog at http://blog.goalsontrack.com.