

# 1.

# INTRODUCTION

## 1.1 Introduction

This user guide is intended for users of Resource Tracker, the work scheduling tool of the Tracker Software System.

## 1.2 What is Resource Tracker?

Resource Tracker is an easy-to-use, comprehensive and efficient way to schedule project work in your business. It is designed to be operated either on a desktop PC or via an interactive whiteboard – an ideal way to operate the system and communicate to all staff.

It consists of four parts:

- Individual Planner
- All Staff Planner
- Weekly Planner
- Executive Overview.

Each part of Resource Tracker has its own chapter in this user guide; refer to the relevant chapter for detailed instructions on how to use the software. The final chapter in this guide provides answers to frequently asked questions (FAQ) and the Appendix lists the settings for the schedule.ini file

### 1.2.1 Individual Planner

The Individual Planner is your personal view of Resource Tracker. It displays the details Tracker holds relating to your work time, enabling you to maintain and manage your diary. The Individual Planner is linked to the Weekly Planner and All Staff Planner so that any bookings made for you are displayed on your individual planner, and any requests for time off that you make are fed through to the All Staff Planner for authorisation. The Individual Planner enables you to:

- display your diary
- book time off
- amend time that you have booked off
- manage your holiday entitlement
- print a page from your Individual Planner
- obtain directions to a client's site.

## 1.2.2 All Staff Planner

The All Staff Planner is a comprehensive but easy-to-use scheduling tool, fully integrated with the data you already have stored in Tracker. You use the All Staff Planner to schedule projects for staff and communicate the schedule to all interested parties.

The All Staff Planner enables you to:

- view resource and project schedules on a fully flexible display
- assign jobs to staff
- edit the times of assignments
- remove assignments
- link appointments
- move and copy appointments
- display maps
- view project information
- attach notes to assigned jobs
- record time off
- authorise time off
- send diary e-mails
- print reports
- export data to other applications.

## 1.2.3 Weekly Planner

The Weekly Planner provides a one-week view of the schedules, which allows you to see who has time still available and who is fully booked. You can use the Weekly Planner to schedule projects and to assign people to projects.

The Weekly Planner lets you:

- view appointments for a week
- schedule projects/jobs
- assign staff to a project/job
- unassign staff from a project/job
- identify who has unscheduled time remaining.

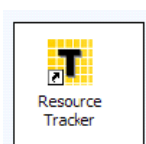
## 1.2.4 Executive Overview

The Executive Overview consists of the All Staff Planner with an additional feature which provides a means to display summary financial information for scheduled work. The Executive Overview presents an overview of the data stored in Resource Tracker, enabling you to see how much income will be generated for a specified time period.

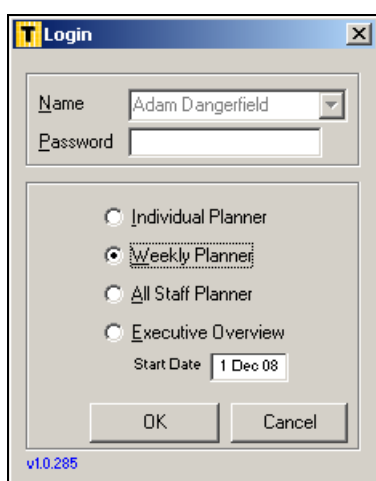
## 1.3 Getting started with Resource Tracker

To start working with Resource Tracker:

1. Double-click on the Resource Tracker icon:



The Resource Tracker Login screen is displayed.



2. Enter your user name and password in the Login screen.
3. You can now select the part of Resource Tracker with which you want to work.  
Your access level determines which parts of Resource Tracker you are allowed to access. If you are not allowed to access any part of Resource Tracker then that option is greyed out.

The access level is set on the Staff screen in Tracker.



Refer to the relevant chapter for detailed instructions on how to use the software.

4. Click OK to open the selected part of Resource Tracker.