1. INTRODUCTION

1.1 Introduction

This user guide provides help and guidance in how to use the Tracker Software System. In this introduction, the following topics are covered to help you start working with the software:

- what is Tracker?
- what's new in Tracker?
- getting started with Tracker
- changing your password.

1.2 What is Tracker?

Tracker is the professional project tracking software from Start Software, a trading division of Start Technology Ltd. It is an easy-to-use, menu-driven system that any business can use to track projects or jobs throughout their lifecycle. The system can track any type of project or job. Its main features enable you to track:

- customers
- quotations and orders
- projects
- project resources
- invoices.

The Tracker Software System is modular, and the chapters in this user guide reflect the structure of the software and the modules appropriate to your use of the system. The following chapters are available:

- **Maintaining System Data** – describing how you can maintain the data that provides settings, templates and pick lists for the system
- **Prospect Tracker** – exploring how you can use Tracker to maintain and manage information relating to prospective customers, to quotations and orders
- **Project Tracker** – describing how to create and track projects
- **Survey Tracker** – explaining how you can use Survey Tracker to record asbestos survey data quickly and easily
  (Note that additional survey modules are available for other survey types.)
- **Lab Tracker** – dealing with the recording and loading of analysis results and working with Bulk Sample projects
- **Tracker Mobile** – covering how to use the Pocket PC-based data capture module
- **Pocket PC Reinspections** – describing how to perform Reinspections, using a Pocket PC, which update Asbestos Tracker Registers with reinspection data

- **CRM** – describing how you can manage the customer relationship by using the CRM Dashboard and CRM Toolbar
- **Reporting** – examining how to query your data and produce reports
- **Invoicing** – describing how to raise invoices both linked to projects and ad hoc.

1.3   What's new in Tracker?

Tracker includes enhancements to many areas of the software. The main features are outlined below:

- **Clients**
  The Client screen now includes new tabs for Quotes and Orders, enabling you to check details, create a quotation or receive an order direct from the Client screen. There is also an Auto Dial button (via modem) that will dial a phone number for you.

- **Quotations**
  You can now capture more data at quotation time, including a cost breakdown of total value. A quotation can be followed through to an order, and subsequently a project, without re-typing all the details.

- **Orders**
  The Customer order screen allows multiple projects to be created easily from one order, even where multiple services are offered. It also enables you to view and jump directly to the projects linked to an order.

- **Projects**
  Project milestones now include a graphical timeline which represents the total duration of the project, from the earliest date to the final milestone. Target dates for each milestone can be set either by typing them in or by calculating them automatically. In addition, batch invoicing and batch closing of projects make these processes much faster.

- **Surveying/Lab Tracker**
  Enhancements to the Survey Details screen make it easier to update details for survey reports. It is now even easier to record the results of sample analysis, and re-test results of a sample can also be recorded. Bluetooth linking problems should disappear with new support of phone/Pocket PC combination devices.

- **Resource Tracker**
  Changes to Resource Tracker have completed the integration of this work scheduling tool with Tracker, enabling you to view scheduled time within Tracker itself.

☞   Refer to the Resource Tracker User Guide for full details on scheduling projects using Resource Tracker.

✎   *Individual clients may have specially customised versions of the Tracker software. This user guide documents the functionality of the generic version of the software. Therefore, it may be that your screens look and behave slightly differently to those described in this guide.*

1.4   Getting started with Tracker

This section is intended to help you get started with Tracker. It describes some of the basic features of the software that you need to master before you can begin working effectively with the system, including how to:

- log on so that you can start working with Tracker
- log off when you have finished working with Tracker
- use certain keys to help you move around the screens
- select from menus
- search for records
- sort records A-Z and Z-A
- filter data by selection
- use the record selector bar
- create records
- edit records
- delete records.

1.4.1   Logging on

To start working with Tracker:

1.   Double click on the Tracker icon on the desktop.

The Tracker Logon dialog box is displayed.
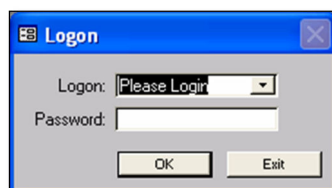
2. Type your user name in the **Logon** field, or select your user name from the drop down list.

3. If a password is required, type your password in the **Password** field.

4. Click on the **OK** button to start Tracker and display the Main menu.
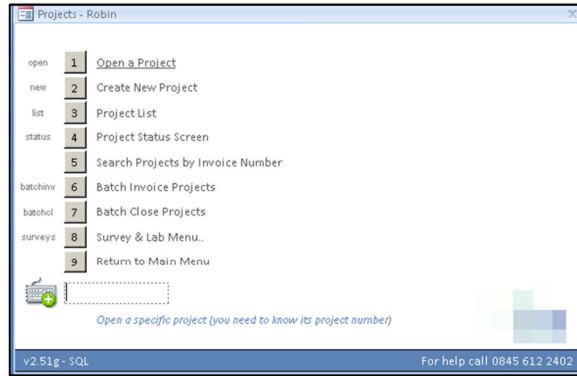
1.4.2 Logging off

When you have finished working with Tracker, close the system down by selecting *Exit Application* from the Main menu. Alternatively, click on the ⊠ button in the top right-hand corner of the screen.

1.4.3 Moving around the screens

The following keys and their actions help you to enter information and move around the Tracker screens:

Key	Action
Tab	Moves cursor forwards from field to field
Enter	Moves cursor forwards from field to field
Shift+Tab	Moves cursor backwards through fields
Esc	Deletes changes made to a field
Esc, Esc	Undoes all changes made to the current record
Shift+Enter	Forces a save

1.4.4 Selecting from menus

Whenever a menu is displayed, you can select an option from the menu by using one of the following methods:

- use the mouse to point and click on the text of the option you require
- use the mouse to point and click on the number button of the option you require
- type the number of the option you require.

Option 9 on all menus takes you back a level in the menu hierarchy. On the Main menu, which is the first menu, this means that option 9 exits the application.

1.4.5 Searching for records

Whenever you want to search for a particular record in Tracker, you can use the Find facility to help you locate it. To use the Find facility you must know some of the details of the record you are searching for.

To perform a search:

1.   If you want to search for information in a specific field, click on the field you want to use for searching.

   If you do not select a specific field, the search is performed on the whole screen.

2.   Click on the Find button ![binoculars icon], or press **Ctrl+F** to display the Find and Replace dialog box.
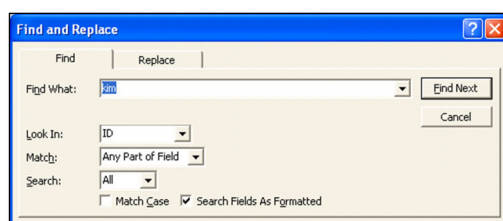
3.   Type your search text in the **Find What?** field.

4.   Set the **Match** field to either 'Whole Field' or 'Any Part of Field' depending on whether you want the search to match your search text precisely or to find the text as a selection anywhere in the field.

5.   Click on Find Next (or press **Enter**) to display the first matching record.

6.   Scroll through the returned records, by using the arrow buttons on the record selector bar, until the required record is displayed.

1.4.6 Sorting records A-Z and Z-A

The sorting facility enables you to sort the records displayed on your screen using the field that you choose. You might, for example, find it useful to sort the projects displayed on the Project List by their project type. You can sort records alphabetically from A to Z, or in reverse alphabetical order from Z to A.

To sort records:

1.   Click in the field which you want to use for sorting.

2.   Click on the A-Z ![A-Z icon] button to sort the records alphabetically, or the Z-A ![Z-A icon] button to sort the records in reverse alphabetical order, on the selected field.

1.4.7   Filtering data by selection

You can filter the data displayed on a Tracker screen to hide all the data that you do not want to see. This enables you to display only the records with which you want to work. For example, if you are viewing a list of projects, you can filter data so that only records for a selected customer are displayed.

To filter by selection:

1. Right click in the field that contains the data you want to filter.

    For example, if you want to filter by client, then right click on the selected client's name in the client column.

    A menu is displayed.

2. Select *Filter by Selection* from the menu.

    The list now shows only records matching your selection.

3. Repeat steps 1 and 2 as necessary to refine the search.

    If you select another field from the filter-limited list, and select *Filter by Selection* once more, the records displayed are those that match both criteria.

   The filter remains in effect until you remove it.

4. If you wish to remove the filter, click on the Remove Filter button:

✎   *You can also use the Filter Excluding Selection option on the menu that appears when you right-click in a field. This option hides all the data matching your selection.*

1.4.8   Using the record selector bar

As you get used to Tracker you will notice that you work with records of differing types in the same way. This section explains some of the basic tasks that you can perform to work with records, using a typical screen as an example.
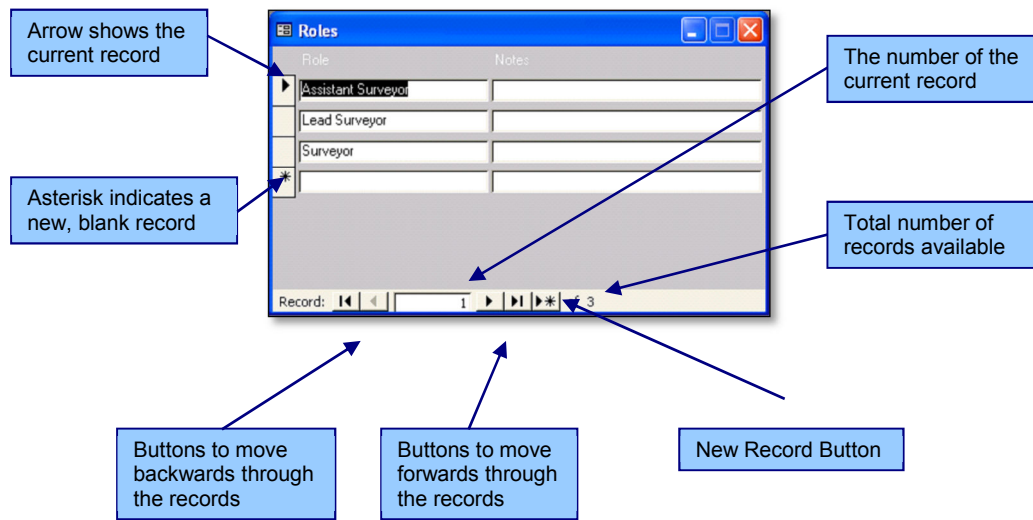
Creating a new record

You can create a new record by typing into the blank record marked with an asterisk. As soon as you start typing into the blank record, a new blank record is automatically created.

If there is no blank record displayed, create one by clicking on the New Record button.

Editing a record

You can edit a record by clicking on it to make it the current record and then typing your amendments. A pencil symbol replaces the arrow to indicate that you are editing the record:

When the pencil symbol is shown you can use the **Esc** key to undo or cancel actions.

☞   Refer to Section 1.4.3, Moving around the screens, for further information on key actions.

Deleting a record

To delete a record:

1. Click on the record selector on the left-hand side of the record you want to delete.

2. Press the **Delete** key. A dialog box asks you to confirm the deletion.

3. Click on Yes to confirm the deletion.

> 🖉 *Not all screens allow you to delete records.*

1.5 Changing your password

Tracker may require a password when you log on to the system. You can change this password as necessary to maintain security. As a standard user you have the authority to change your own password. The System Administrator, however, is able to change their own and other users' passwords.

To change your password:

1. Select option 8, *Change Personal Details,* from the Main menu.

The Users window is displayed, showing your user ID and full name.

If you are logged in as the System Administrator, then the **Is Administrator?** tick box is ticked and the record selector bar is displayed at the bottom of the Users window. Use the record selector bar to find the user whose password you want to change.

2. Type the required new password in the **Password** field.

3. Save your changes and close the Users window by clicking on ❎ in its top right-hand corner.