

**iTrac app user guide
for apple[®] iOS products**



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Setup

iTrac is an Apple iOS application (also available for Android) used for capturing real time data of employee, job, phase, activity, materials, notes, and more. The application utilizes a cellular or Wi-Fi network to connect with the Tractivity TracManager database via an IIS web service located on your local server.

Prerequisites

TracManager 2012 and above and the iTrac web service must be installed and operational. TracManager must be fully configured and populated with customer, job, employee and labor activities.

Assign an Employee as an iTrac User

An iTrac user must be assigned an iTrac user license, a User Name, and Password in TracManager before using the application.

Open TracManager and click on the Time & Payroll TAB.

Expand the Setup menu and click on pcTrac/iTrac Users

The left panel will list existing license holders. The center area is used to delete, modify, or create a new user.

To assign an iTrac license to an employee – select the employee from the list, click New and enter a user name and password for the employee. The default option will create a user name and password based on the first initial and last name. Choose the default option or enter a password of your choice. Check the checkboxes to the right to enable or disable options. Click Save. Repeat for each employee that will need to be assigned a pcTrac/iTrac license.

Set Up iTrac Help Lists

Employees who have been assigned a pcTrac/iTrac license must be assigned to a Workgroup. Each workgroup has a Help List associated with it. A Help List is a list of predefined data selections to aid employees in the selection of information such as Job, Activities. The Help List reduces possible errors in data entry, because options are selected and not manually entered.

Each Workgroup must contain a Help List for both Jobs and Activities. Additional Help Lists, Material and Employee, can be created. A Material Help List can be created if utilizing Materials. An Employee Help List will need to be created if Supervisors use iTrac in multi-employee mode.

Create and Manage Job Help Lists

The Job Help List is a list of predefined data selections that can be used to aid Employees, which are assigned to a Workgroup, in the selection of the information they are capturing for TracManager. Alternate languages may appear on the Help Lists based on the language preference settings on the Employee Records.

To create a Job Help List, select from the menu Help Lists>Jobs. Select a Workgroup from the drop down list. Select one or more Jobs from the Master Job List to include in the selected Workgroup's Help List using one of the following methods:

To select a single Job: place your mouse cursor on a Job and click on it, highlighting the Job.

To select multiple separate Jobs: select each Job with your cursor while holding down the CTRL button.

To select multiple sequential Jobs: highlight the first Job then hold the

SHIFT key and highlight the last Job or hold the mouse button down while dragging over the Jobs to highlight them.

Click the Add> button to assign the selected Jobs to the selected Workgroup Help List. Click the <Remove button to remove the selected Jobs from the selected Workgroup Help List. The Help List can be sorted by Job Code, description, alphabetical, Client, or Branch.

Create and Manage Activity Help Lists

The Activity Help List is a list of predefined data selections that can be used to aid Employees, which are assigned to a Workgroup, in the selection of the information they are capturing for TracManager. Alternate languages may appear on the Help Lists based on the language preference settings on the Employee Records.

To create an Activity Help List, select from the menu Help Lists>Activities. Select a Workgroup from the drop down list. Select one or more Activities from the Master Activity List to include in the selected Workgroup's Help List using one of the following methods:

To select a single Activity: place your mouse cursor on an Activity and click on it, highlighting the Activity.

To select multiple separate Activities: select each Activity with your cursor while holding down the CTRL button.

To select multiple sequential Activities: highlight the first Activity then hold the SHIFT key and highlight the last activity or hold the mouse button down while dragging over the activities to highlight them.

Click the Add> button to assign the selected Activities to the selected Workgroup Help List. Click the <Remove button to remove the selected Activities from the selected Workgroup Help List. The Help List can be sorted by Activity Code, description, alphabetical, Client, or Branch.

Create and Manage Material Help Lists

The Material Help List is a list of inventory items that are designated to a Workgroup. Employees, who are assigned to a Workgroup, can easily select from the predefined data selections on their data capture devices when entering information for TracManager.

To create a Material Help List, select from the menu Help Lists>Materials. Select a Workgroup from the drop down list. Select one or more Materials from the Master Inventory List to include in the selected Workgroup's Help List using one of the following methods:

To select a single Material: place your mouse cursor on a Material and click on it, highlighting the Material.

To select multiple separate Materials: select each Material with your cursor while holding down the CTRL button.

To select multiple sequential Materials: highlight the first Material then hold the SHIFT key and highlight the last Material or hold the mouse button down while dragging over the Materials to highlight them.

Click the Add> button to assign the selected Materials to the selected Workgroup Help List. Click the <Remove button to remove the selected Materials from the selected Workgroup Help List. The Help List can be sorted by description or part number.

Create and Manage Employee Help Lists

The Employee Help List is a list of employees that can be selected when capturing information from data capture methods. The Supervisor mode allows a single device to be used to capture time transactions for multiple employees. The Employee Help List provides the list of employee choices.

To create an Employee Help List, select from the menu Help Lists>Employees. Select a Workgroup from the drop down list. Select one or more Employees from the Master Employee List to include in the selected Workgroup's Help List using one of the following methods:

To select a single Employee: place your mouse cursor on an Employee and click on it, highlighting the Employee.

To select multiple separate Employees: select each Employee with your cursor while holding down the CTRL button.

To select multiple sequential Employees: highlight the first Employee then hold the SHIFT key and highlight the last Employee or hold the mouse button down while dragging over the Employees to highlight them.

Click the Add> button to assign the selected Employees to the selected Workgroup Help List. Click the <Remove button to remove the selected Employees from the selected Workgroup Help List. The Employee List can be sorted by name or employee number.

Devices

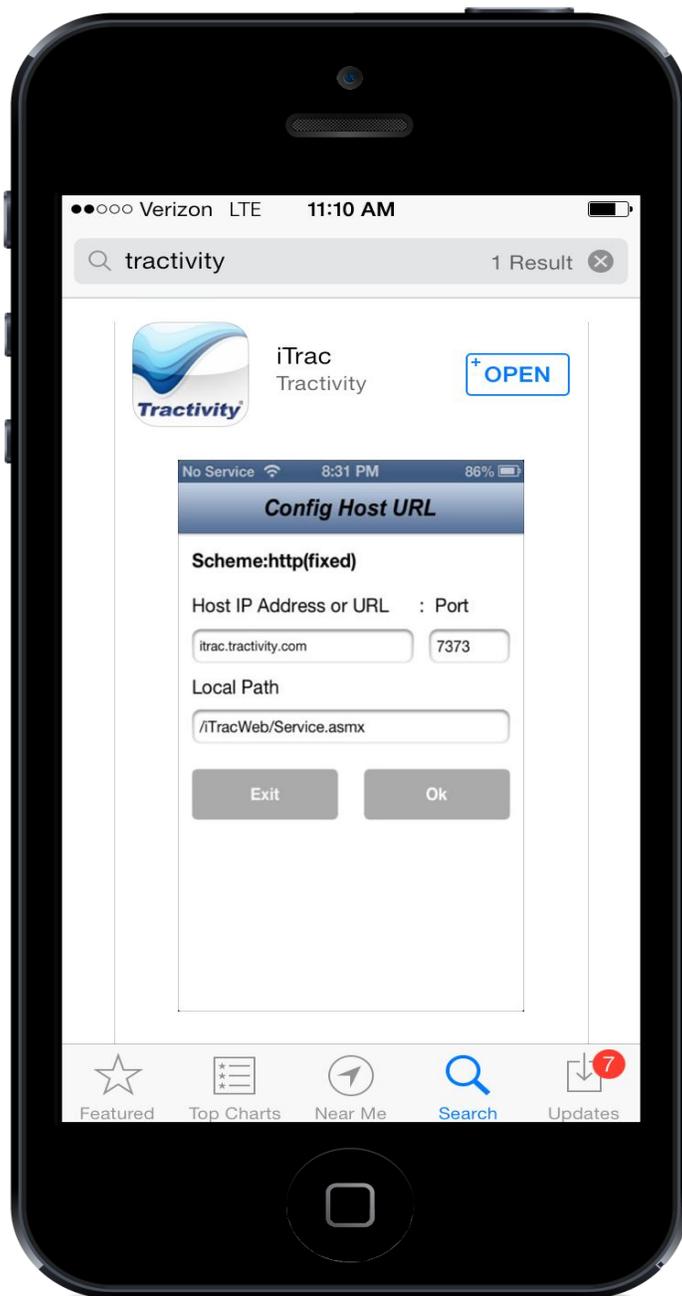
The iTrac application runs on Apple iOS 5 and above. Choose from a wide range of hardware suppliers for your iPhone, iPod touch, iPad, or iPad mini. (iTrac is also available for Android 2.3 and above.)



How do I download iTrac?

Search for *Tractivity* using the Apple App Store and download the free iTrac app.

iTrac will install; open iTrac. The application starts out configured to connect to the Tractivity iTrac Demo site. Before using iTrac it will need to be configured to connect to your iTrac service.



How do I initially configure iTrac?

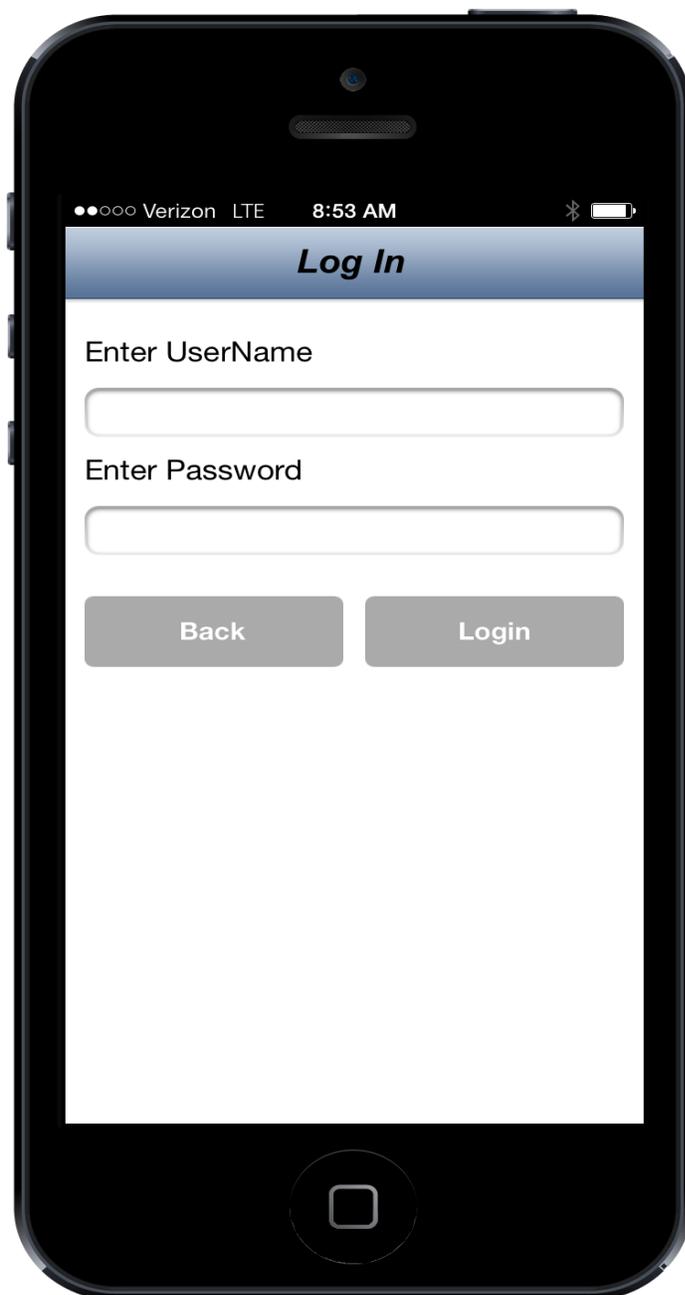
Each company is configured differently. Contact your company's IT department or Tractivity Customer Support for information.



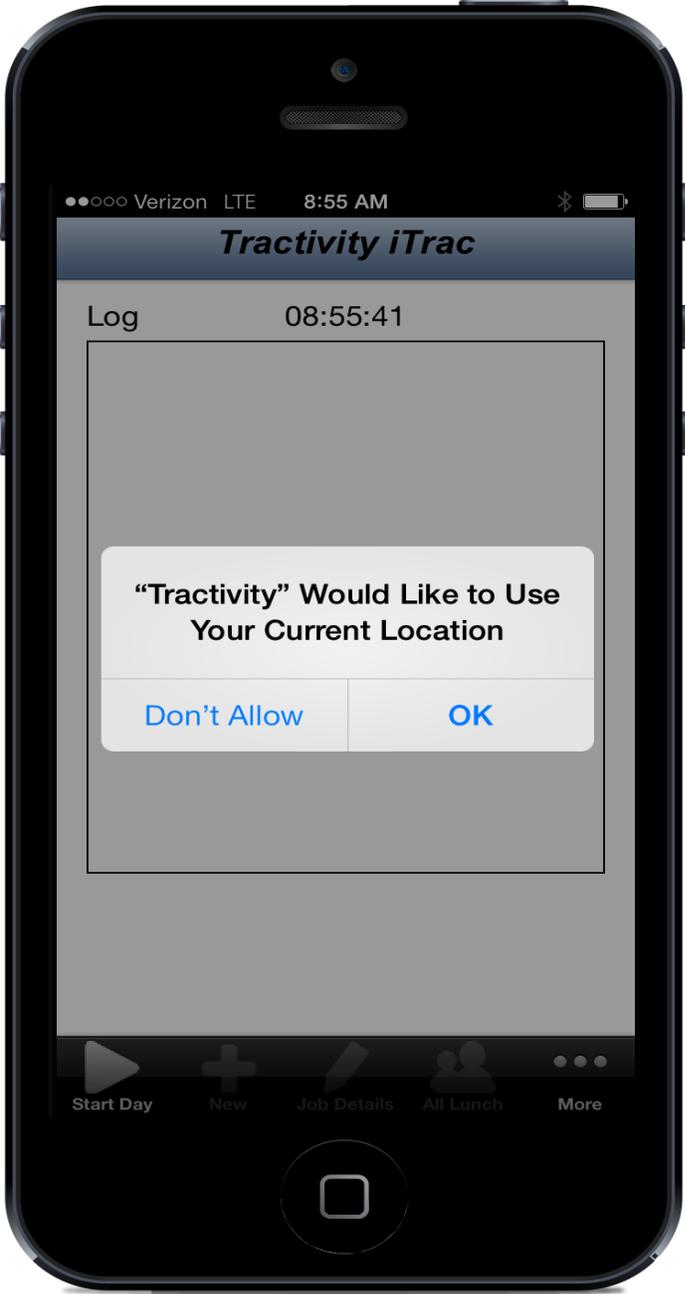
Getting started...

Log In

iTrac users are assigned iTrac user licenses along with a User Name and Password. If you do not have an assigned username or password contact your Tractivity Systems Administrator or call Tractivity Customer Support. Enter the assigned username and password. Select Login.



Would you like Tractivity to use your current location? Select OK.



Start Day

After logging in to iTrac select Start Day to clock in for the day. Your start time will appear on the iTrac log screen.



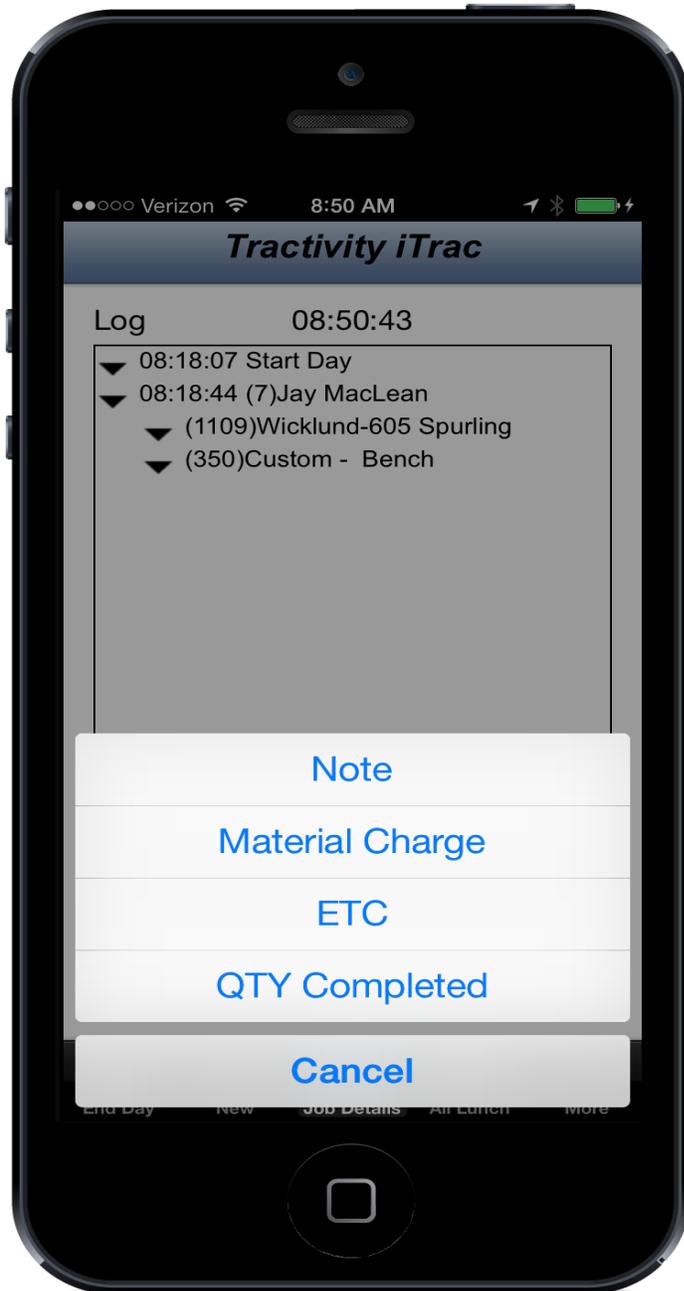
Enter a New Job and Activity

Select the Job, Job Phase (if using), and Activity that you will now begin working on.



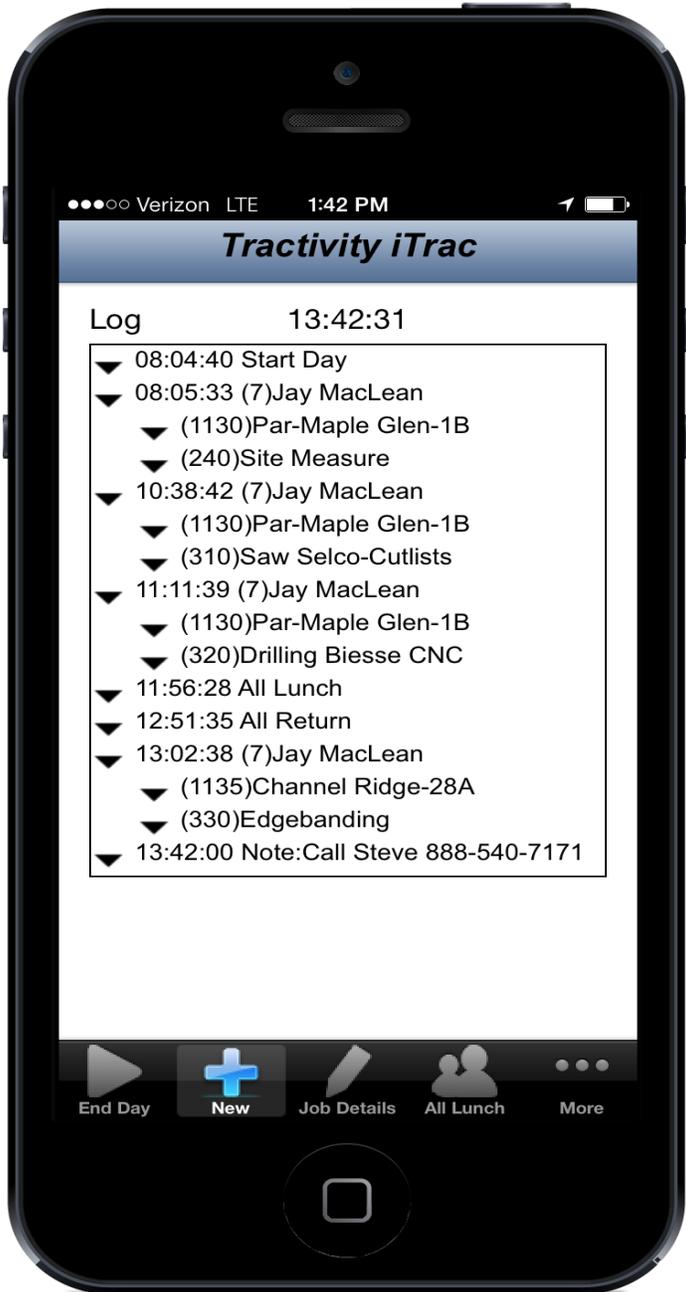
Job Details

You can view additional details for the selected job. From this screen you can easily create notes, enter materials to be charged to the job, enter the ETC, and enter quantity completed.



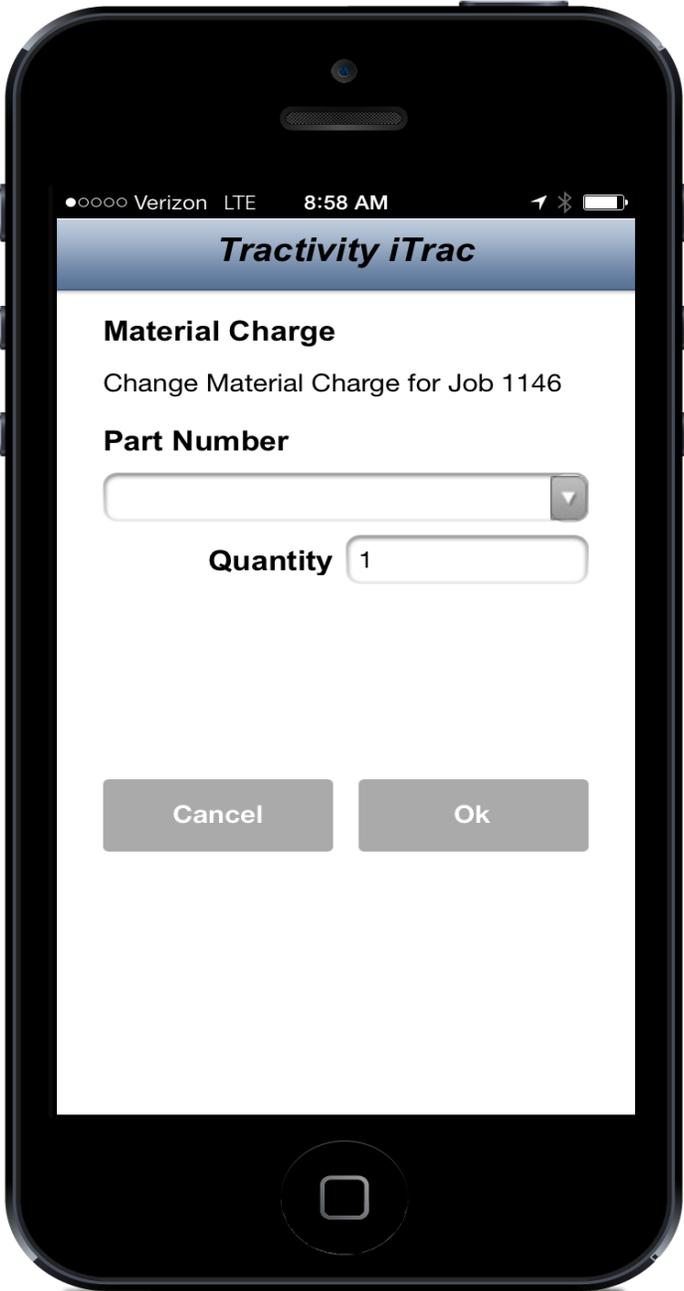
Note

Enter notes for the selected job. Notes appear on the timesheet and are associated with job and activity.



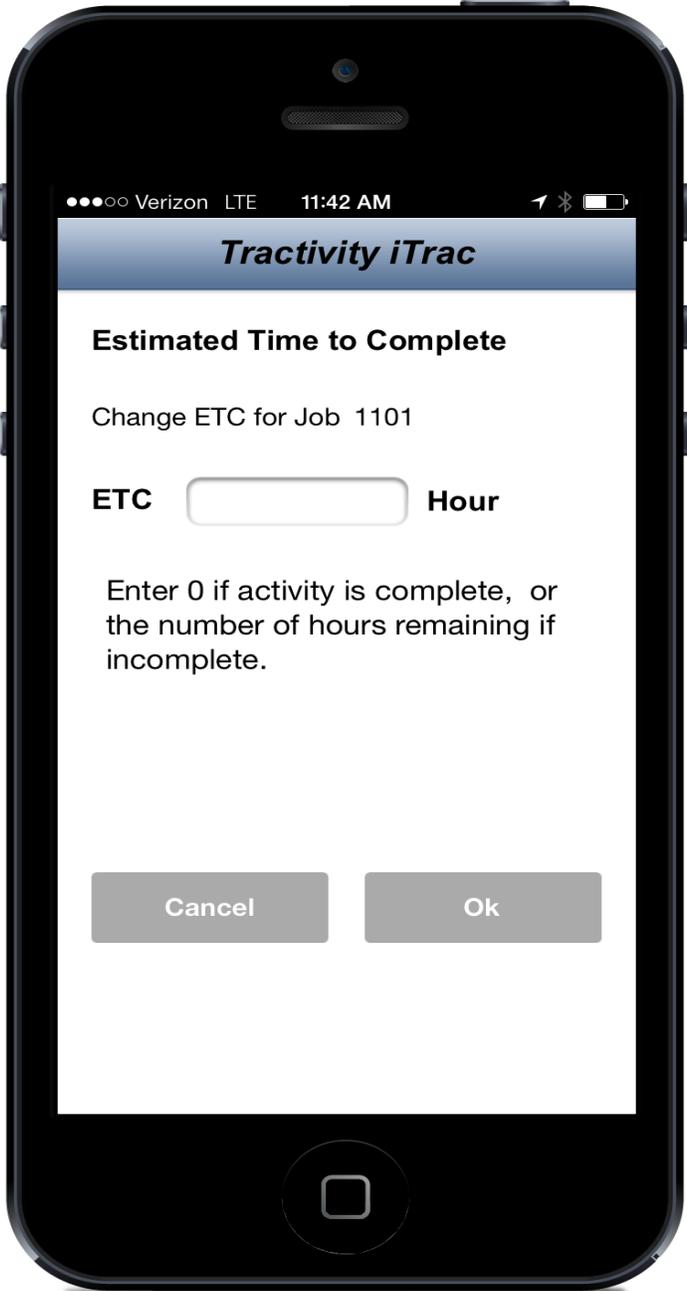
Material Charge

Enter the part numbers for the material used or use the drop down selector to choose a part number. Enter the quantity used for the job. Select OK.



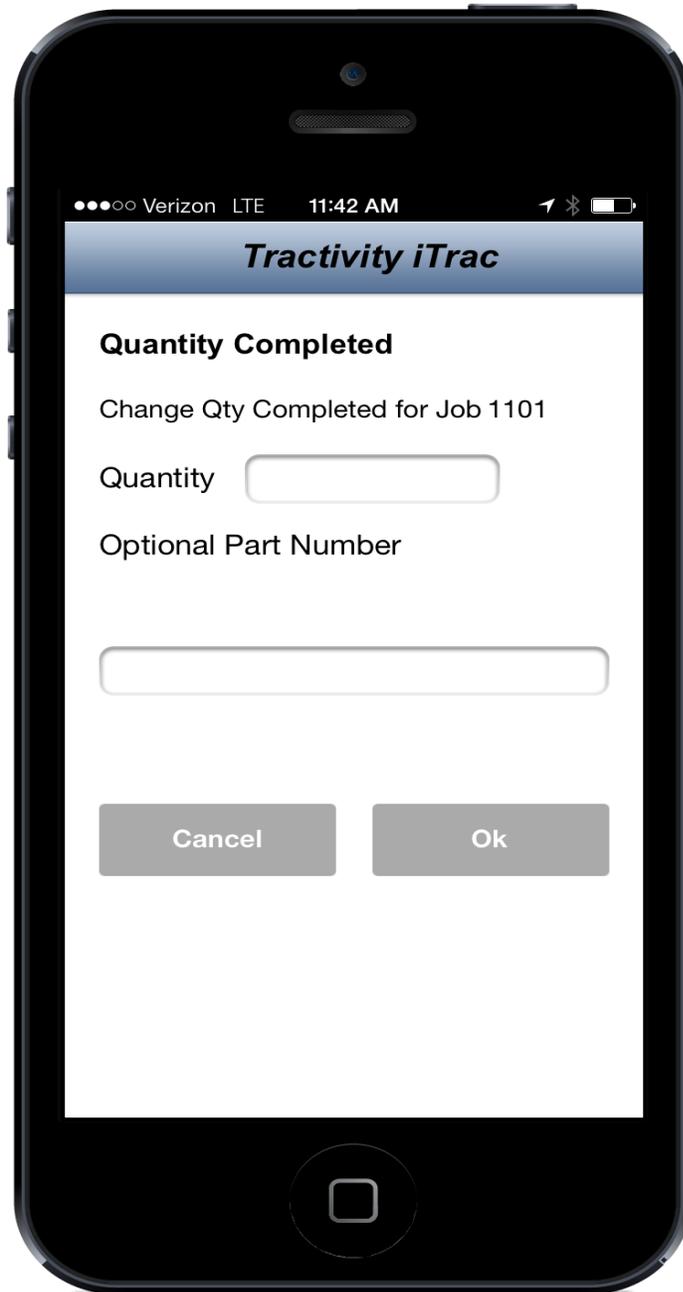
Estimated Time to Complete

Enter the Estimated Time to Complete for the selected job. Select OK.



Quantity Completed

Enter the quantity completed for the selected job. Optionally a part number can be entered.



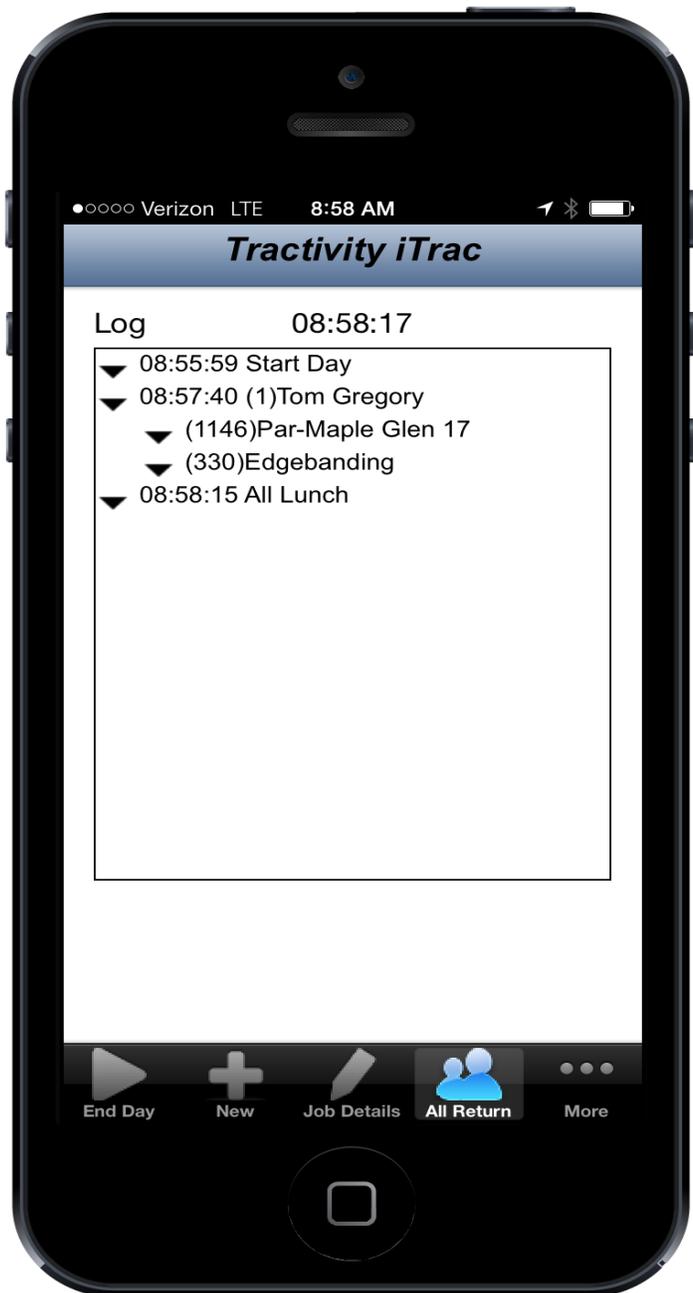
The image shows a black iPhone displaying the Tractivity iTrac application. The status bar at the top shows 'Verizon LTE', '11:42 AM', and battery level. The app title 'Tractivity iTrac' is centered at the top of the screen. Below the title, the screen displays the following text and input fields:

- Quantity Completed**
- Change Qty Completed for Job 1101
- Quantity
- Optional Part Number
-
- Cancel
- Ok

Lunch

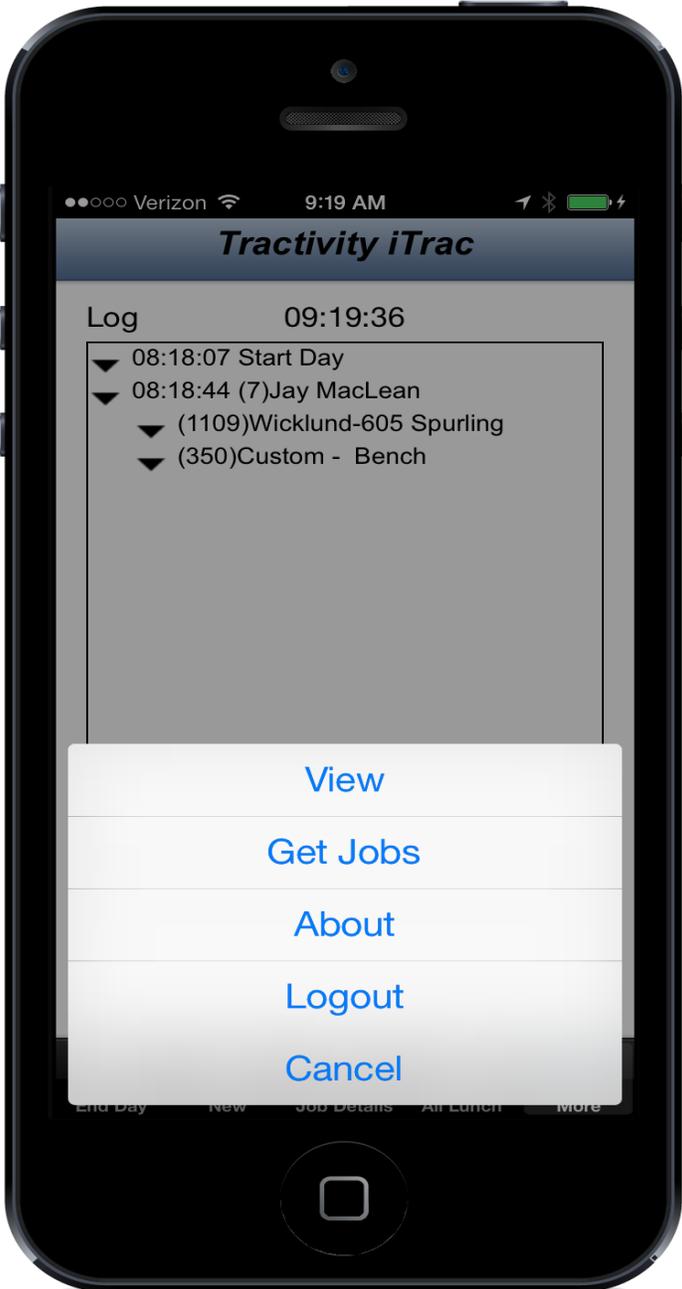
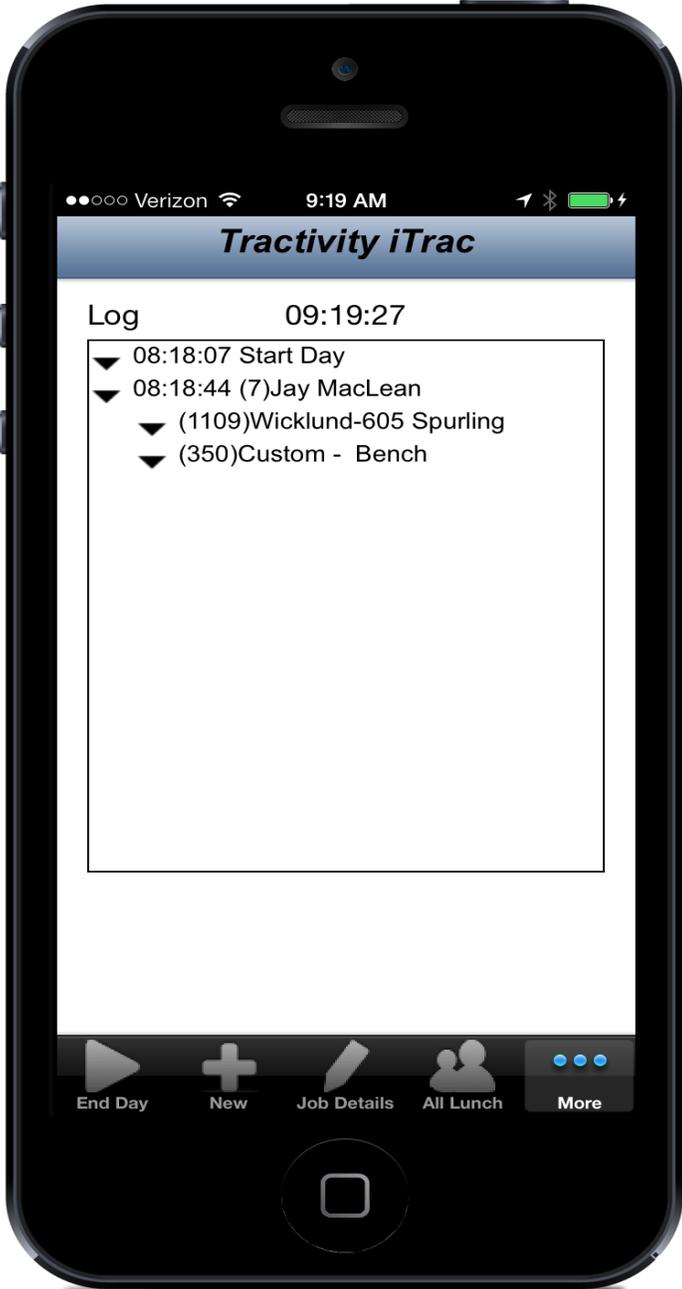
Single Employee Mode: Select All Lunch when taking a lunch break. When you return, select All Return. You will automatically be clocked back into your Job and Activity selections prior to lunch. Alternately, you can clock into Job 0 for Lunch. When you return clock into the Job and Activity you will begin working.

Multi-Employee Mode:
Selecting All Lunch will clock all employees using the same iTrac device into a Lunch break. When employees return from lunch select All Return and they will all be clocked back into their job and activity selections prior to lunch. Alternately, each employee can be independently clocked into Lunch using Job 0; employees will need to be independently clocked into their Job and Activity when they return from Lunch.



More

The More menu allows you to view additional information including your activity log, job log, hour log, and job hours. You can also sync to get jobs, view iTrac version and status, and logout of iTrac.



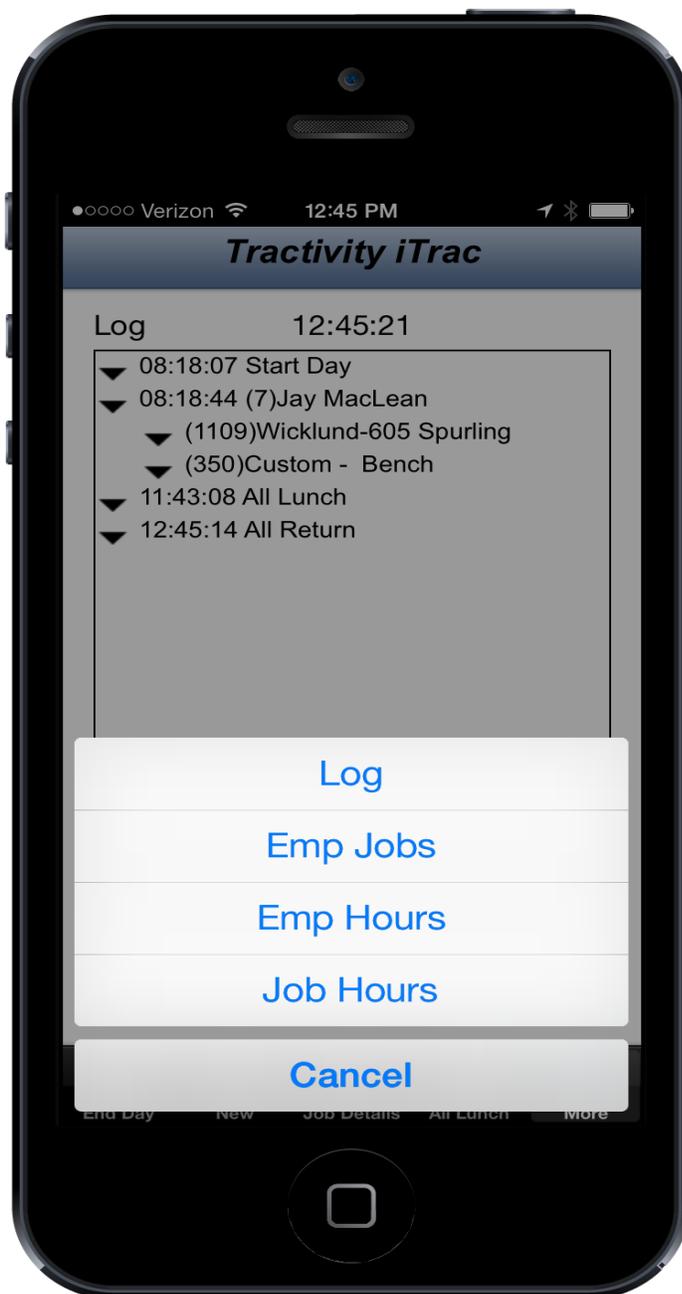
View

Log - View the entry log for the current day.

Employee Jobs - View the Jobs and Activities you have worked on during the current day.

Employee Hours - View the hours worked for the current day.

Job Hours - View the hours spent on each job for the current day.



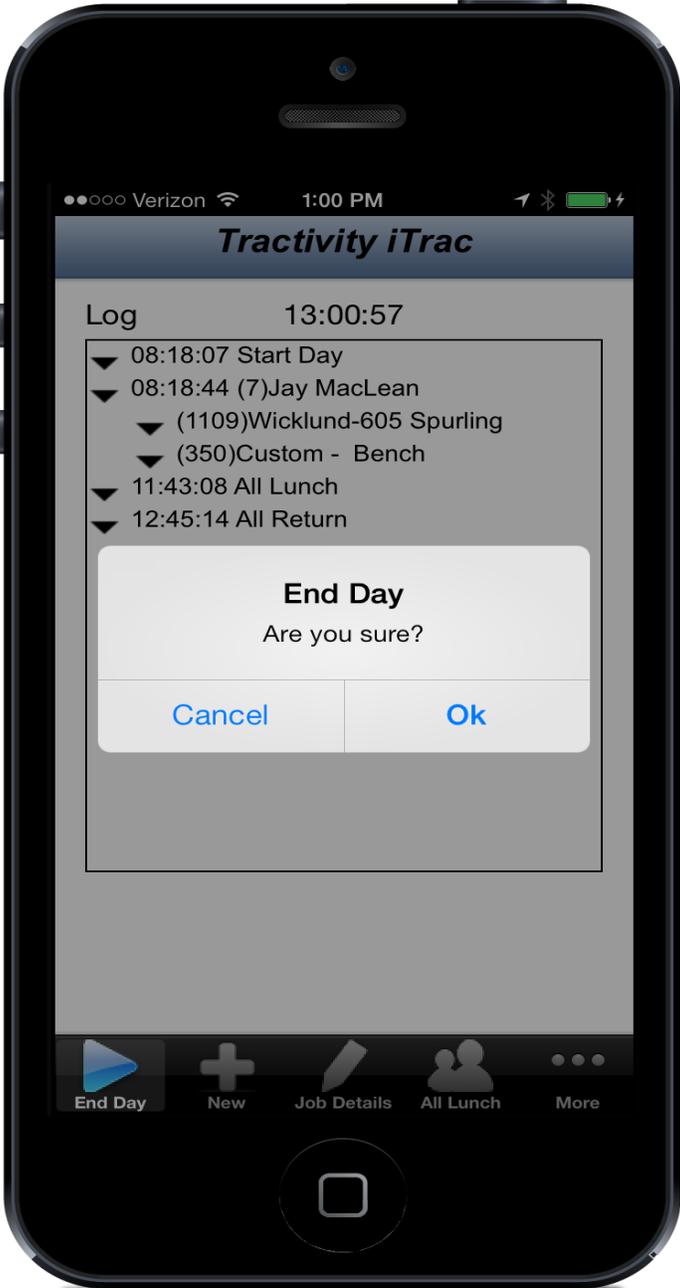
Get Jobs

Updates job information with TracManager.



End Day

When your work day is finished, select End Day to clock out. Select OK to end your day or cancel to continue working. Your end time will appear on the iTrac log screen. The End Day function informs the iTrac system that your timesheet may now be processed.

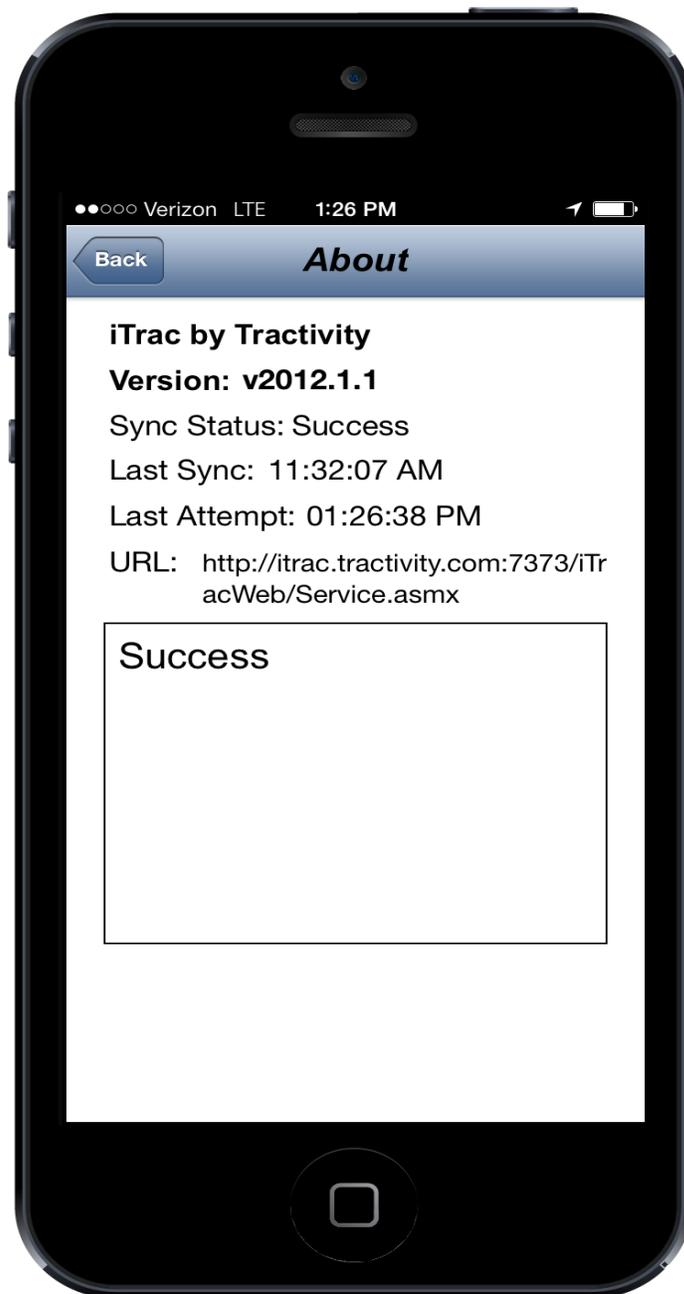


About

The About screen shows information about the iTrac version, sync status, last sync time and URL address.

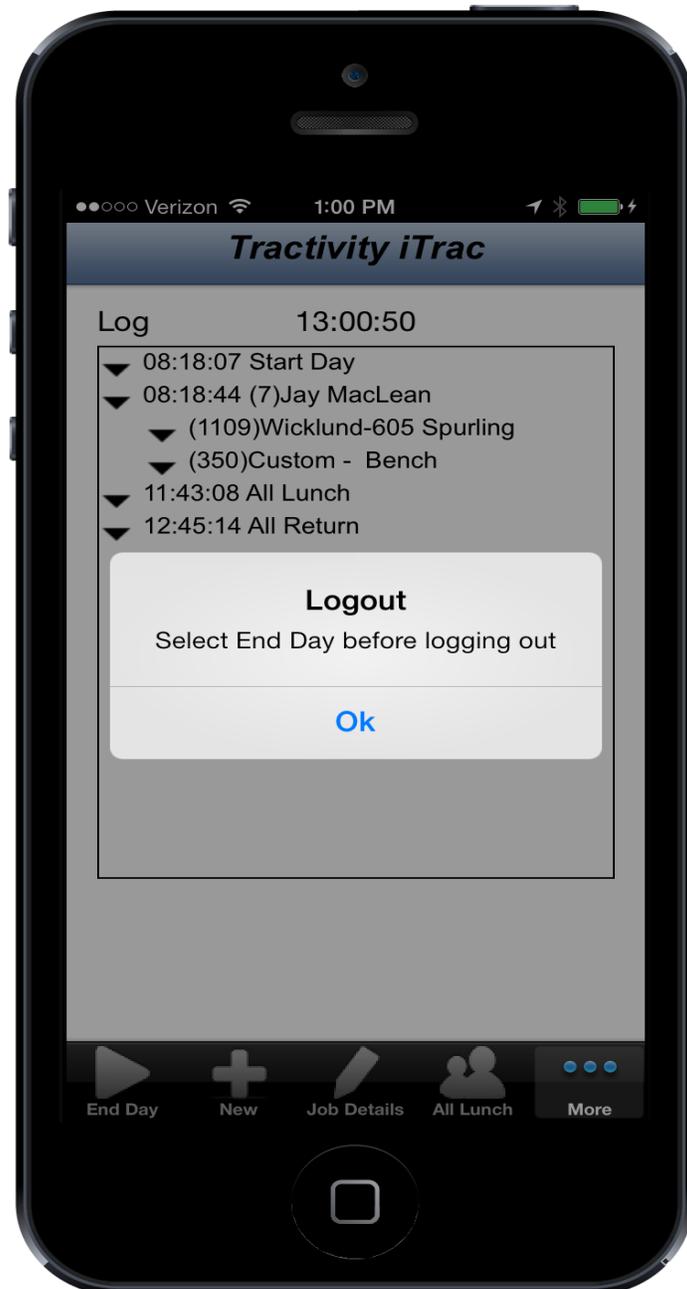
Success – sync has occurred successfully

Sync pending – does not have a connection to the IP address.



Logout

Once your work day has ended, select Logout which will take you back to the Login screen. Note: You must select End Day before Logout.



Need More Help?

If you have questions about using the iTrac app, please contact Customer Support:

E: support@tractivity.com

T: 888-540-7171