DOVICO SOFTWARE

Step-by-Step Guide

For DOVICO Track-IT Suite 2005

STEP-BY-STEP FOR

DOVICO Track-IT® Suite 2005

Introducing Track-IT® Suite 2005, the industry standard in enterprise-wide solutions for time and project management from DOVICO. This power-packed version combines exciting new features with the established functionality corporations have come to rely on.

Track-IT® Suite 2005 is a full-featured software package designed specifically for time and cost reporting. It's ideally suited for corporations and professionals who desire to improve productivity and monitor project time and costs. This scalable 100% web-based and client-server solution monitors projects, timesheets, invoices and expenses for employees, teams and departments. Through better time and project management, Track-IT® Suite 2005 helps corporations reduce costs and deliver your projects on time.

Managers using Track-IT® Suite 2005 easily select over 135 customizable time and cost reports & graphs by individual, team, project, activity and more. Every report or graph can be exported or sent by e-mail in many different formats. Track-IT® Suite 2005 can easily create invoices, and expense reports or track billing and receivables.

> “ **...Very powerful and full-featured. Proves you get what you pay for. We have evaluated 10 other products and nothing comes close to the functionality that Track-IT Suite offers.** ”
>
> *A. Dunn*
> *MaxCAD Technologies*

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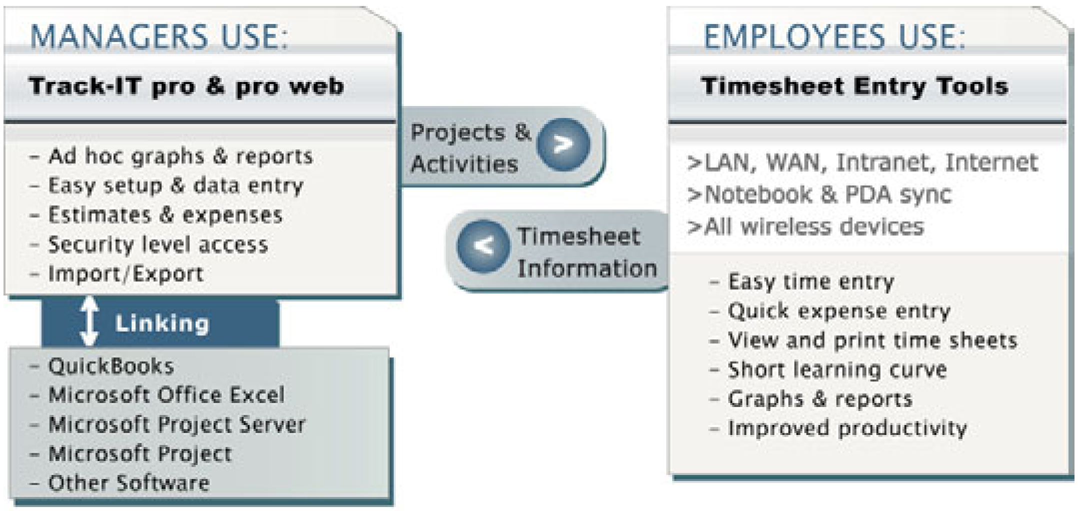
1 What is Track-IT Suite?

"Best Business Software, Editors Choice" ZDNet highest rating…

In today's highly competitive marketplace, you need every advantage to manage your employee time. Track-IT Suite 2005 software eliminates the time wasted, and inaccuracies of, manually recording data, enables you to keep track of all work-related or billable time and makes it easy to prepare estimates on projects.

This valuable asset to on-the-job productivity tool is also very easy to use. With the click of a mouse, this innovative product eliminates the labor and takes the guesswork out of time keeping.



Remote connectivity through many Wireless Devices,
Palm PDAs, Internet, Intranet, LAN , WAN or VPN connections

TRACK-IT SUITE 2005 OVERVIEW:

Track-IT pro is a Windows based software used for team and individual time and cost management. Basic information (clients, projects, tasks, employees, etc.) is entered into Track-IT pro. Track-IT timesheet entry tools (Track-IT light, Track-IT web edition, Track-IT wireless and/or Track-IT punchclock) are used for time/expense recording.

Track-IT pro web is a 100% web-based version of Track-IT pro. Using Track-IT pro web, a project manager or administrator can accomplish their usual day-to-day Track-IT activities (approve timesheets, produce reports, etc) from any location and on any computer. All that's required is a computer with a web browser and access to the Internet. NO CLIENT INSTALLATION REQUIRED.

In a typical multi-user installation for example, everyone uses one or more Track-IT timesheet entry tools on a daily basis for time and expense entry, and to view his or her timesheet and productivity reports. Managers or empowered employees use Track-IT pro and/or Track-IT pro web weekly or monthly for project monitoring and reporting (by employee, team, client, project, task, etc.).

Track-IT Suite 2005 also includes many state-of-the-art Track-IT timesheet entry tools, which meet the needs of employees in your business no matter what type of work they do. Employees can select from one or more of the following Track-IT timesheet entry tools for individual time and expense entry and reporting:

1. **Track-IT light** is a Windows based software used by employees to enter time and expenses through the LAN, WAN, VPN, Internet or Notebook Synchronization. Track-IT light provides performance information (pie/bar charts, reports) to help increase productivity and improve performance. Employees may enter time in a variety of different formats (timer, stopwatch, or enter bulk time at the end of the day, week, month, etc.)

2. **Track-IT web edition** is a web-based software used by employees to enter time and expenses over the Internet (WWW) or an Intranet. Employees using a web browser simply select the project and task, and enter their time and expenses. Track-IT web edition provides reports to help increase employee productivity and improve performance.

    a. **Track-IT wireless** is an award winning time entry tool enabling employees to enter time and expenses through many wireless Internet devices (ex. Web enabled cell phones, PDAs, Blackberrys etc.). Employees simply go to the Track-IT web edition URL, and the Track-IT server will configure for their display and data entry type. Track-IT wireless is automatically installed with Track-IT web edition.

3. **Track-IT PDA** is PDA-based software used by employees to enter time and expenses through their Personal Digital Assistants. Palm HotSync synchronization is supported. (Not included in Demo Software)

4. **Track-IT punchclock** is a Windows based software used by employees to punch in and out of a selected project and task through a LAN, WAN, or VPN. Traditional punch clocks usually require complicated setup, installation and servicing which can in turn be expensive. With very little setup, Track-IT punchclock will work on multiple computers throughout your organization.

    To view product information go to: http://www.dovico.com/products.html

    For more information on these components and to view screen shots, go to: http://www.dovico.com/faq25.html

TRACK-IT SUITE 2005 ALSO INCLUDES OTHER COMPONENTS:

Track-IT pro Database Manager.

This software enables you to perform maintenance functions for any Track-IT Suite database:

- Archive information
- Backup databases
- Create new Track-IT databases
- Move a Track-IT database
- Delete existing Track-IT databases
- Re-index existing databases
- Rename existing databases
- Restore previously backed-up databases

Track-IT pro Assistant (job tasking tool)

This software allows you to perform Job Tasking Automation for the following functions:

- Automated Backup
- Automate over 130 different reports
- Automated Notifications to Employees and Clients
- Scheduled Database Maintenance

Import-Export Tool (XML, HTML, and all character separated formats e.g. CSV, TAB)

Microsoft® Project & Microsoft® Project Server Synchronization

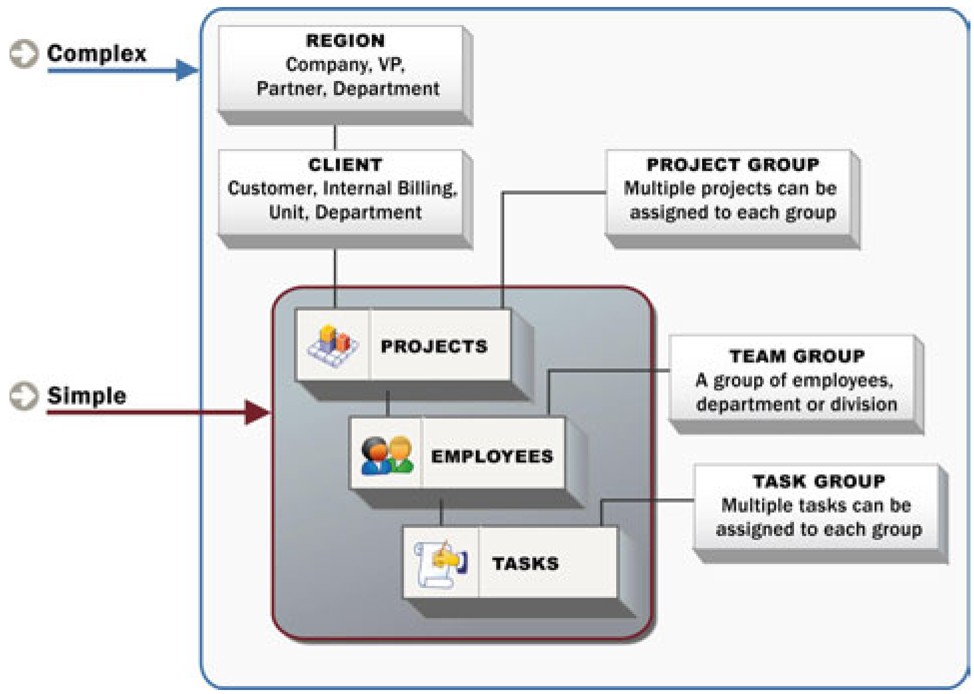
- Certified by Microsoft. Using either Microsoft Project or Microsoft Project Server, this synchronization can be used to manage your projects between the two applications. Employees use the timesheet entry tools to record their time and the time is also updated in each Microsoft Project file automatically.

QuickBooks® Synchronization

- This synchronization can be used to bill your projects from QuickBooks and keep the time information in sync between the two applications.

And Much More….

Track-IT Suite 2005 Typical Set-up



Customize the terminology according to your requirements (for example, instead of Client, it could be Department, Business Unit, etc.).

Employees enter time and expenses against only assigned projects & tasks. This time & expense information is rolled-up to each level (task group, project, project group, client etc.).

2 Requirements

Compatible with Microsoft Windows operating system versions 98, NT, 2000, ME, XP and 2003.

- **SERVER REQUIREMENTS**

Track-IT Suite Components

- Track-IT pro	- Track-IT pro web	- MSDE Database
- Track-IT light	- Track-IT punchclock	- Database Manager
- Track-IT web edition	- Track-IT PDA*	- MS Project Link
- Import & Export tool	- QuickBooks® Link	- Track-IT pro Assistant
- MS Project Server Link	- Track-IT wireless	

* Track-IT PDA is not installed by default.

Optimal Requirements	Minimum Requirements
❖ WINDOWS 2000 SP3 WITH INTERNET INFORMATION SERVICES (IIS) ❖ PENTIUM III 750 MHZ ❖ 256 MB RAM ❖ 300 MB HARD DRIVE SPACE ❖ File and Printer Sharing for Microsoft Networks*	❖ Windows 98 ❖ Pentium II 400 MHz ❖ 300 MB Hard Drive space ❖ 64 MB RAM ❖ File and Printer Sharing for Microsoft Networks*

Please Note: If you do not meet the optimal requirements above, then some components may not install.
* Track-IT pro Assistant requires a minimum of Windows NT/XP/2000/2003
* Track-IT web edition and Track-IT pro web require a minimum of Windows XP/2000/2003 and IIS 5.0 or higher
* **IMPORTANT**: If Microsoft Windows NT/2000/XP/2003 is used, File and Printer Sharing for Microsoft Networks must be installed.

- **WORKSTATION REQUIREMENTS**

TRACK-IT PRO (MANAGERS)

- Windows 98 or higher
- Pentium II 400 MHz
- 64 MB RAM
- 50 MB Hard Drive space

TRACK-IT PRO WEB (MANAGERS) (optimized for IE and no installation required)

- Any computer using an HTML web browser (IE 5.0 or greater, or Netscape 7.0 or greater).
- JavaScript and cookie enabled
- Adobe/Acrobat Reader version 5.1 or above
- All popup blockers disabled

TRACK-IT TIMESHEET ENTRY TOOLS (EMPLOYEES)

1. **Track-IT light (no installation required)**
   - Windows 98 or higher
   - Pentium 100 MHz
   - 16 MB RAM
   - 2 MB Hard Drive space (to store offline files)

2. **Track-IT web edition (optimized for IE and no installation required)**
   - Any computer using an HTML web browser (IE 5.0 or greater, or Netscape 7.0 or greater)
   - JavaScript and cookie enabled
   - All popup blockers disabled

3. **Track-IT punchclock (no installation required)**
   - Keyboard, card or bar code readers may be adapted for employee use
   - Windows 98 or higher
   - Pentium 100Mhz or better
   - 20 MB RAM or more
   - 10 MB hard drive or more

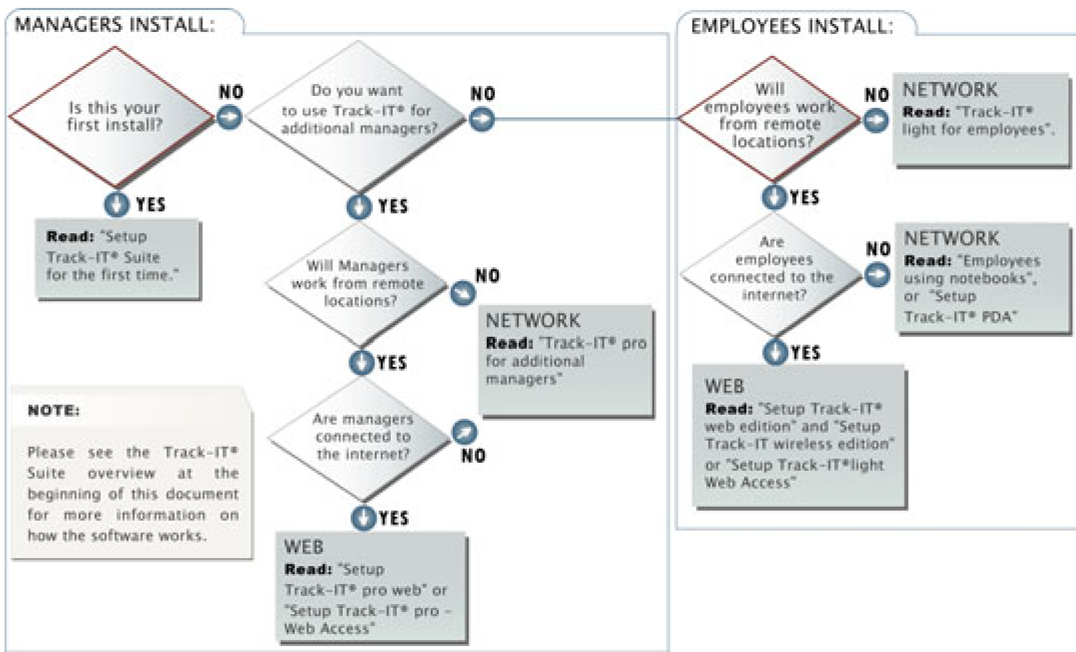
4. **Track-IT PDA (PDA installation required)**
   - Palm® HotSync supported

5. **Track-IT wireless (no installation required)**
   - Many internet wireless devices with web browsers are supported
   - Examples: Web-enabled cell phones, PDA's with Internet access etc.

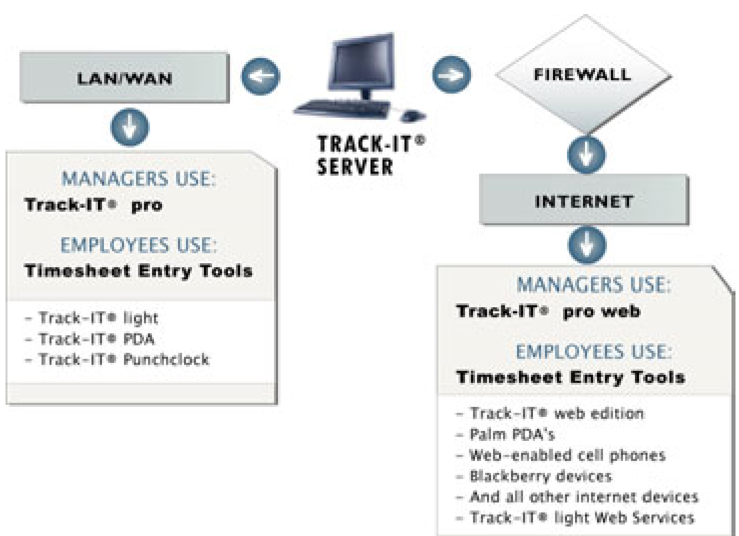
3 Installation

BEFORE INSTALLING

Diagram for Corporate Rollout



Example Deployment Model
(Many deployment types are available: web-based, network etc.)



SETUP TRACK-IT SUITE FOR THE FIRST TIME

- Run the installation from the server where Track-IT Suite will be accessed (do not attempt the installation through a terminal connection such as Terminal Services).
- Track-IT pro Database Manager software can only be accessed from this server location.
- Close all open applications, optional services (e.g. back-up software, Anti-Virus services) and stop all Anti-Virus software. Failing to perform this step may cause installation problems.
- Employees using Track-IT light and Track-IT PDA must have read/write access to the Track-IT folder and subfolders through a mapped drive.
- It may be necessary to re-start your server two or three times before the installation is complete.

Please Note:
Track-IT Suite requires MSDE (supplied with Track-IT Suite) or access to SQL Server 2000 (or above).

If your server has an earlier version of SQL Server then your options are:

- If the earlier version of SQL Server is required for other applications, then install Track-IT Suite on another server.
- If SQL Server is currently not being used then uninstall the earlier version of SQL Server and follow the instructions below.
- Upgrade your SQL version to SQL Server 2000 or above.

Please Note:
- Track-IT Web Components (Track-IT web edition, Track-IT pro web and Track-IT Web Services API) require IIS (Internet Information Services) to be installed on the server prior to installing Track-IT Web Components. For instructions on how to install IIS please go to the following web page:
  www.dovico.com/KBase/WebHelp/kbase2/installing_internet_information_services.html
- If you are not using Windows 2003 Server, ASP.NET will need to be installed prior to installing Track-IT Web Components.
  For instructions on how to install ASP.NET please see:
  www.dovico.com/KBase/WebHelp/kbase2/installing_asp_net_on_windows_2003_server.html
- If you are using Windows XP Home Edition, IIS (Internet Information Services) is not included with this operating system and as a result Track-IT Web components will not be available.

STEPS TO INSTALL TRACK-IT SUITE THE FIRST TIME:

If installing Track-IT Suite on a computer where SQL Server 2000 or above is already installed, or installing across multiple servers (Web Server, Application Server, Database Server etc.) then:
Review our Detailed Installation Guide:
http://www.dovico.com/KBase/WebHelp/detailedinstallguide/detailed_install_guide.html

- Insert the CD and a menu will be displayed to install the software. If the menu does not display, select **Run** from the **Start** menu and click browse to navigate to the **launch.exe** file located on the CD. Click **Open** then click **OK**.
  or
  If you have downloaded the software, then run **Track-ITSuite2005v12.exe**
- A Track-IT Suite 2005 setup screen will be displayed. Read the text and click **Next** when done. At this time if any components need to be upgraded, they will be upgraded before the second screen is displayed.
- Read the License Agreement and click **Yes** if you agree to the terms.
- Enter your **Company Name** and **User Name**. Click **Next**.
- Select whether or not to install **Track-IT's web based components** including Track-IT pro web and Track-IT web edition. Click **Next**.
- Select a **folder** where Track-IT Suite will be installed (must be a local hard drive). Click **Next**.
- When the "Install Shield Wizard Complete" screen is displayed, click **Finish**.
- You are now presented with the option to install MS Database Engine screen (MSDE). **IMPORTANT**: Take note of the default account and password information displayed and click **OK** to install MSDE.
- After MSDE is installed, click **OK** to reboot the computer.

TRACK-IT PRO AND TRACK-IT LIGHT FOR ADDITIONAL MANAGERS

- Use this option as often as necessary from each workstation where Track-IT will be accessed.
- This will set-up Track-IT pro and Track-IT light to be accessed in their Windows **Start**, **Programs** menu items.
- Only a few required files for Track-IT access will be placed on this computer.

STEPS TO SETUP ACCESS TO TRACK-IT PRO AND LIGHT

- Ensure that the client computer has full access permissions to the Track-IT installation directory on the server.
- Click the Client Installs link in the Network Directory (example: N:\Program Files\Dovico\Trackit\Client Setup\).

TRACK-IT LIGHT FOR EMPLOYEES

- Use this option as often as necessary from each workstation where Track-IT light will be accessed.
- This will set-up Track-IT light to be accessed in their Windows **Start**, **Programs** menu items.
- This will only install shortcuts on this computer.

STEPS TO SET-UP TRACK-IT LIGHT:

- Ensure that the client computer has full access permissions to the Track-IT installation directory on the server.
- Run "Setup TLight.exe" (located in N:\Program Files\Dovico\Trackit\)

1. Start Track-IT light.
2. The next three pop-up screens are used to setup preferences for Track-IT:
   a. **Timesheet entry**: Select the startup screen for timesheet entry (Timer, Bulk Time or Timesheet). Click the **What's this help** at the top right hand corner to obtain a description on these time entry methods. Click the **Next** button once you have made your selection.
   b. **Setting options**: Set options for Track-IT light preferences. These options can be changed anytime from the **Tools**, **Options** menu. Click the **Next** button when finished.
3. When prompted for a password, enter the same **Password** that was entered in the **Employees** view of Track-IT pro or Track-IT pro web.

EMPLOYEES USING NOTEBOOKS

(REMOTE USER TRACK-IT LIGHT INSTALL)

- This install is useful for employees with notebook computers or who have a temporary or fragile network connections (WAN, VPN, Internet) and therefore disconnect from the network periodically.
- Caution: It is best to try the above option '**TRACK-IT LIGHT FOR EMPLOYEES'**, rather than this install as full installation files will be copied to this workstation computer.

STEPS TO INSTALL TRACK-IT LIGHT:

- Click the Client Installs link in the Network Directory (example: N:\Program Files\Dovico\Trackit\Client Setup\)
- Select **Use File on Local Drive**, from within Track-IT light, to easily connect and disconnect from the network.

SETUP TRACK-IT PRO WEB

- Track-IT pro web will be installed by default if your company has Microsoft Internet Information Services (IIS).
- If you would like to access Track-IT pro web from anywhere in the world via the Internet, then a Static IP Address is required. Contact your Internet Service Provider for additional information on obtaining a Static IP Address.

Steps for manager access to Track-IT pro web:

1. Start your web browser (Internet Explorer, Netscape, etc.) and enter the URL for the login page (Example: http://www.yourserver.com/twebnet/)

2. Choose the **Database** from the dropdown list.

3. Enter your **User ID**. (Example 'RB' for demo database)

4. Enter your **Password**. (Example 'RB' for demo database)

Please Note: Managers should be given the URL of the web page above, User ID and Password as assigned to them.

You can verify which version of Microsoft .NET Framework is installed on your computer by double clicking the **Add/Remove Programs** function from your Windows Control Panel.

Setup Track-IT web edition

- Track-IT web edition will be installed by default if your company has Microsoft Internet Information Services (IIS).
- If you would like to access Track-IT web edition from anywhere in the world via the Internet, then a Static IP Address is required. Contact your Internet Service Provider for additional information on obtaining a Static IP Address.

Steps for employee access to Track-IT web edition:

1. Start your web browser (Internet Explorer, Netscape, etc.) and enter the URL for the login page (Example: http://www.yourserver.com/twebnet/)

2. Choose the **Database** from the dropdown list.

3. Enter your **User ID**. (Example 'RB' for demo database)

4. Enter your **Password**. (Example 'RB' for demo database).

Please Note: Employees should be given the URL of the web page above, User ID and Password as assigned to them.

Setup Track-IT wireless Edition

- Track-IT wireless will be installed by default if your company has installed Track-IT web edition (above).
- To access with a web enabled device (Cell Phone, PDA, Etc.) simply, Start your web browser and enter the URL for the login page (Example: http://www.yourserver.com/twebnet/)

Setup Track-IT PDA

This information is in a separate document, please contact sales@dovico.com.

Setup Track-IT Light – Web Access

Steps for employee access to Track-IT light Web Access:

Note: A Web Access configuration URL is required to access Track-IT light over the Internet. Contact the system administrator for more details.

1. Start **Track-IT light**.

2. Select the **Web Access tab**.

3. Enter the **Web Access configuration URL**.

4. Press the **Update** button.
5. Select a **database**.
6. Enter the **User ID** and **Password**.
7. Select **OK** to logon.

SETUP TRACK-IT PRO – WEB ACCESS

Steps for manager access to Track-IT pro Web Access:

Note: A Web Access configuration URL is required to access Track-IT pro over the Internet. Contact the system administrator for more details.

1. Start **Track-IT pro**.
2. Select the **Web Access tab**.
3. Enter the **Web Access configuration URL**.
4. Press the **Update** button.
5. Select a **database**.
6. Enter the **User ID** and **Password**.
7. Select **OK** to logon.

4 Getting started quickly

USING TRACK-IT PRO

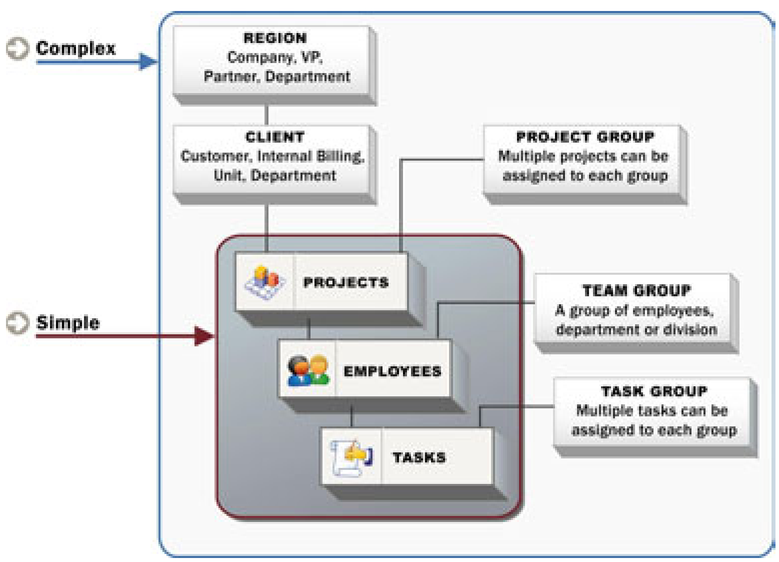
Use this section of the guide if you plan to setup your database using Track-IT pro. If you are setting up using Track-IT pro web, go to page 15.

All manuals are available from our website, free of charge.

To help you quickly setup and configure your Track-IT database, DOVICO has developed **My Setup Assistant**.

My Setup Assistant offers a series of project, business and process questions. The answers provided generate a custom set of instructions to assist the user on how to setup the software for their particular needs. To create a customized set of setup instructions for your particular requirements, access My Setup Assistant from your desktop by clicking My Setup Assistant from the Start menu on your desktop (Start / All Programs / Track-IT Suite). Or go to http://www.dovico.com/versions/track-it_suite_v12_setupassistant.html.

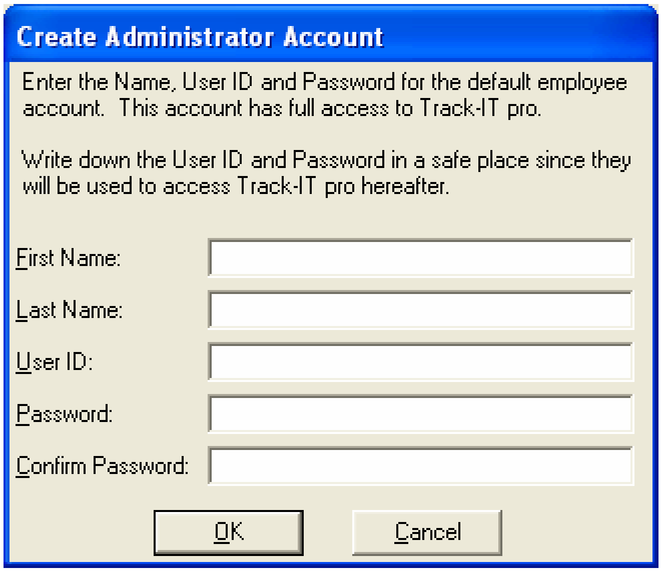
- The following steps are designed to help you get started quickly so we will show you the steps to configure a Track-IT pro database using the simple configuration shown below. However, should you wish to enter additional levels of information, you can do so by adding Groups.
- For help on particular topics, please refer to the **Help** index of Track-IT pro, Track-IT pro web or timesheet entry tools. Or use the **What's this help** for assistance (click the at the upper right-hand corner of the screen then click any item, or simply go to that box and press **Shift + F1)**. You can also search for help topics in the help file (select **Help**, **Contents** from the menu).
- To customize the terminology used in the software, select **Database Options**, **Database Terminology** from the menu within Track-IT pro.
- For tips & tricks on how to use Track-IT pro more effectively, click **Help, Tips and Tricks** from the menu.



Steps:

Enter basic information in Track-IT pro:

1. Start **Track-IT pro**. When you start Track-IT pro for the first time, the software may prompt you to enter Administrator Account information. The User ID and Password will need to be entered each time you start Track-IT pro, so make certain you write it down in a safe place.



Enter the necessary information and click **OK** when done.

2. Add **Client** information (**optional**) 

   2.1. From the **Clients** section in the side toolbar, click the **Clients** button.
   2.2. Click **Add** to add a new client to the list.
   2.3. Enter a unique client **Name**.
   2.4. Enter a unique client **Short Name**. An abbreviation for the client name. This abbreviation will be appended to the project name for reporting purposes.

3. Add **Employee** information 

   3.1. From the **Employees** section in the side toolbar, click the **Employees** button.
   3.2. Click **Add** in the toolbar to add a new employee to the list.
   3.3. Enter the **Last Name**.
   3.4. Enter the **First Name**.
   3.5. Enter a unique **User ID**. The User ID is used to access Track-IT.
   3.6. Enter a **Password**. The Password will be used to access Track-IT.

   The remaining employee information is optional.

4. Add **Task** information (enter at least one task) 

   4.1. From the **Projects** section in the side toolbar, click the **Tasks** button.
   4.2. Click **Add** to add a new task to the list.
   4.3. Enter a unique task **Name**.

   The remaining information is optional.

   4.4. Enter a **Description**. When employees select this task, they will see the description entered.

4.5. Check the **Global** box if you want this task to be automatically assigned to all new projects (if no assignments are explicitly made to the project).

5. Add **Project** information (enter at least one project)

5.1. From the **Projects** section in the side toolbar, click the **Project** button.
5.2. Click **Add** to add a new project to the list.
5.3. Select the **Client** name from the list (optional).
5.4. Enter a unique **Project** name.

All remaining information is optional. However, you may want to enter a **Description** to help employees better understand the nature of the work to be performed. This description is seen in Track-IT light and Track-IT web edition.

6. **Assign** employees and tasks to projects.

6.1. From the **Projects** section in the side toolbar, click the **Assignments** button.
6.2. Select the **Project** name from the list.
6.3. Select the **Employees** from the list and using your mouse, drag the selected items to the project.
6.4. Select the **Tasks** from the list and using your mouse, drag the selected items to the employees.

TIP: For even faster assignments use the **Quick Assign Feature** from the Assignment view

You have now finished setting up your Track-IT Suite database, employees have been assigned projects/tasks and they can begin tracking their time!

Go to section 5 to learn how to enter time using Track-IT timesheet entry tools.

Getting started quickly

USING TRACK-IT PRO WEB

Use this section of the guide if you plan to setup your database using Track-IT pro web. If you are setting up using Track-IT pro, go to page 12.

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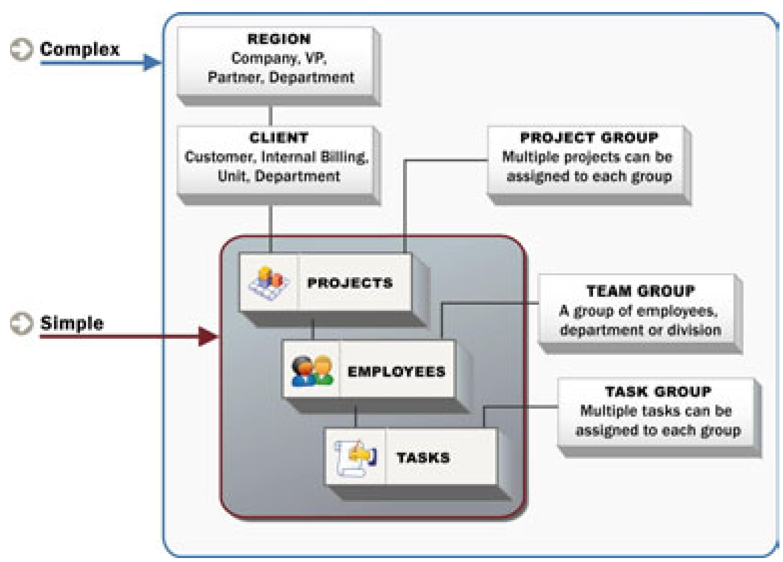
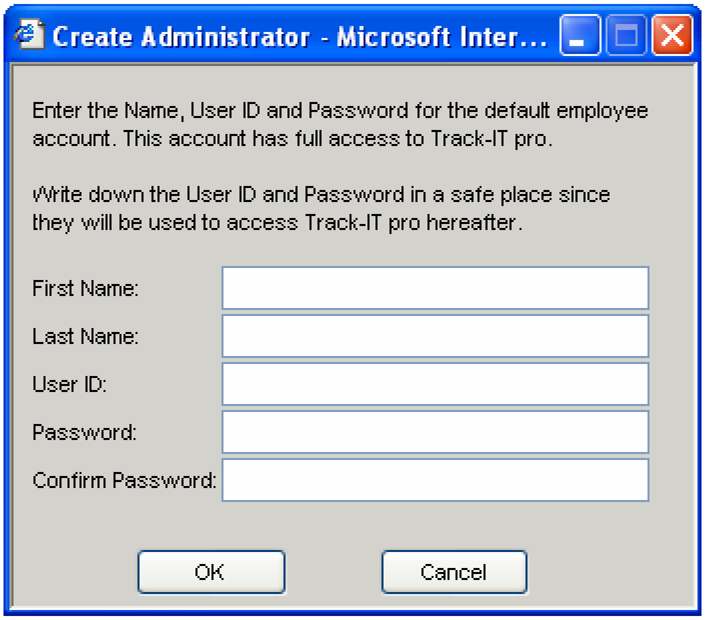
- To customize the terminology used in the software, select **Database Options** from the side shortcut menu within Track-IT pro web.
- For help on particular topics, please refer to the **Help** index of Track-IT pro, Track-IT pro web or timesheet entry tools.



Steps:

Enter basic information in Track-IT pro web:

1. Start **Track-IT pro web**. When you start Track-IT pro web for the first time, the software may prompt you to enter Administrator Account information. The User ID and Password will need to be entered each time you start Track-IT pro web, so make certain you write it down in a safe place.



Enter the necessary information and click **OK** when done.

2. Add **Client** information (**optional**) 

2.1. From the **Clients** section in the side toolbar, click the **Clients** button.
2.2. Click **Add** to add a new client to the list.
2.3. Enter a unique client **Name**.
2.4. Enter a unique client **Short Name**. An abbreviation for the client name. This abbreviation will be appended to the project name for reporting purposes.
2.5. Click the **Save** button.

3. Add **Employee** information 

3.1. From the **Employees** section in the side toolbar, click the **Employees** button.
3.2. Click **Add** in the toolbar to add a new employee to the list.
3.3. Enter the **Last Name**.
3.4. Enter the **First Name**.
3.5. Enter a unique **User ID**. The User ID is used to access Track-IT.
3.6. Enter a **Password**. The Password will be used to access Track-IT.
3.7. Click the **Save** button.

The remaining employee information is optional.

4. Add **Task** information (enter at least one task) 

4.1. From the **Projects** section in the side toolbar, click the **Tasks** button.
4.2. Click **Add** to add a new task to the list.
4.3. Enter a unique task **Name**.
4.4. Click the **Save** button,

The remaining information is optional.

4.5. Enter a **Description**. When employees select this task, they will see the description entered.
4.6. Check the **Global** box if you want this task to be automatically assigned to all new projects (if no assignments are explicitly made to the project).
4.7. Click the **Save** button.

5. Add **Project** information (enter at least one project)

   5.1. From the **Projects** section in the side toolbar, click the **Project** button.
   5.2. Click **Add** to add a new project to the list.
   5.3. Select the **Client** name from the list (optional).
   5.4. Enter a unique **Project** name.
   5.5. Click the **Save** button.

   All remaining information is optional. However, you may want to enter a **Description** to help employees better understand the nature of the work to be performed. This description is seen in Track-IT light and Track-IT web edition.

6. **Assign** employees and tasks to projects .

   6.1. From the **Projects** section in the side toolbar, click the **Quick Assign** button.
   6.2. Select the **Project** name from the list.
   6.3. Select the **Employees** from the list.
   6.4. Select the **Tasks** from the list.
   6.5. Click the **Assign** button.

Go to the **Assignments** view to see a graphical representation of the assignments.

You have now finished setting up your Track-IT Suite database, employees have been assigned projects/tasks and they can begin tracking their time!

REPORTING

Over 135 standard reports can be selected from and you can customize any of them according to your needs. Customized reports can also be added directly to Track-IT for future use. From Track-IT pro or Track-IT pro Assistant, every report can be e-mailed (and dexported(or in many different formats.

1. **Start** Track-IT pro or Track-IT pro web and enter your **User ID** and **Password.**
   * Hint: If you have forgotten your password and you are accessing the Demo Data then you may use the User ID 'RB', and Password 'RB'.
2. For Track-IT pro, select **Reports, Reports Explorer** from the pull down menu.
3. For Track-IT pro web, select **Reports** from the Reports section of the side shortcut bar.
4. Double click the appropriate report.
5. Set the **criteria** for the report and click the Finish button.

* **Please Note**:
- Within Track-IT pro, you may also create reports from most views (select **File**, **Print Preview**).
- **DOVICO publishes additional free reports** for our clients: http://www.dovico.com/reports.html
- **Track-IT pro Assistant** can save you time by sending you, your fellow staff members or clients automated reports on a regular basis.

DATA ENTRY SEQUENCE

When entering data into **Track-IT pro** or **Track-IT pro web** views**,** some data is optional and does not have to be entered. In each view, required field data is denoted with an Asterisk (*) before the required field. Data may also be entered in any order; however, due to the way the software is designed, it may prove helpful to enter your data in a logical sequence. The following is the recommended sequence:

Ideal Data Entry Order:

- Regions
- Clients
- Overtime Rates
- Rates
- Teams
- Employees
- Workflow
- Time and Attendance
- Currencies
- Task Groups
- Tasks
- Project Groups
- Expense Categories
- Projects
- Assignments
- Budgets

*** TIP:** To save a great deal of setup time, simply **Import Your Data** from your other applications directly into Track-IT using the Import Tool available in Track-IT pro.

Importing Data into Track-IT Suite:

- **Start Track-IT pro**
- Select **File**, **Import/Export Tool** from the menu.
- Select **File, New Template** from the menu.
- Select **Import Template**, and set your import criteria.

Should you have questions, please contact your sales representative who will gladly assist you.

5 Entering time using Timesheet Entry tools

TRACK-IT LIGHT

Track-IT light is one of Track-IT Suite's timesheet entry tools. The following steps will show you how to quickly get started using Track-IT light.

1. Start **Track-IT light**.
2. Select your company database.
3. Enter your Employee **USER ID**.
4. Enter your Employee **Password**.
   * Hint: If you have forgotten your password and accessing the Demo Data then you may use the UserID 'RB', and Password 'RB'.
5. Set your preferences using the setup screens provided.

IMPORTANT NOTE: The Employee **Password** and **USER ID** are as assigned in the Employees view in Track-IT pro or Track-IT pro web.

NEW
Reduce internal training costs and enhance employee competency by learning how to use Track-IT light with DOVICO's free e-Learning solution at www.dovico.com/versions/track-it_suite_v12_light_training.html. Or click the **Training** button from Track-IT light's Logon screen or select **Interactive Training** for the Track-IT light's Help pull-down menu.

ENTERING TIME IN TRACK-IT LIGHT

1. Start **Track-IT light**.

2. Different ways employees can enter time:

   a) Use the **Timer** view to track time as you work (like a stopwatch). With the click of a mouse, this innovative tool eliminates the labor and takes the guesswork out of time keeping.

      i) Select the **Project** and **Task** from the list.
      ii) Click **Start** or **Start from last** to start tracking time.
      iii) To stop, click the **Stop** button .

   - Employees can drag & drop items from the Tracking list to the Priority Tracking list and track time using the Priority List.
   - Time entries recorded using the **Timer** view can be displayed and edited in the **Timesheet** view.

   b) Use the **Bulk Time** view to enter your total hours worked for the day or week. This weekly grid allows hours worked to be quickly distributed across one or more days or projects. Use it to copy and paste work from previous weeks or to edit timesheet information. This view shows rolled up time entries per project and task for each day of the week.

      i) Select **Week ending** date.
      ii) Click the **Add** button .
      iii) Select a **Project** and **Task** from the list and click **OK**.
      iv) Repeat the previous two steps until you have added all the required projects and tasks.
      v) Enter the total time worked for each day by project.

- Hint – Employees may create row filters for projects/tasks that are used frequently.

c) All time entered is saved in this **Timesheet** view . From this view, you can add, edit and delete timesheet information. It shows detailed time entries for any date range.

i) Click the **Date Range** button to select a **From** and **To** date to display.
ii) Click the **Add** button on the toolbar.
iii) Enter the total time worked in the **Total** box.
iv) Select a **Project** and **Task** from the list and click **OK**.

- Once time is entered, employees can double click any row to edit time entries.

d) Or, use a combination of a, b and c above.

That's it! Employees are now entering their time. They may even view some productive graphs from the **Reports** menu.

3. To submit timesheets to your manager:

a) Start Track-IT light.
b) Click the **Submit** button .
c) Select the **From** and **To** date range.
d) Click **Submit.**

Note: A message may appear to notify the employee of days that have less than or more hours than their set preferences. This encourages them to edit the data before submission.

TRACK-IT WEB EDITION

Track-IT web edition is one of Track-IT Suite's timesheet entry tools. The following steps will show you how to quickly get started using Track-IT web edition.

1. Start **Track-IT web edition**.
2. Select your company database.
3. Enter your Employee **USER ID**.
4. Enter your Employee **Password**.
   * Hint: If you have forgotten your password and accessing the Demo Data then you may use the UserID 'RB', and Password 'RB'.
5. Set your preferences using the setup screens provided.

IMPORTANT NOTE: The Employee **Password** and **USER ID** are as assigned in the Employees view in Track-IT pro or Track-IT pro web.

ENTERING TIME IN TRACK-IT WEB EDITION

NEW
Reduce internal training costs and enhance employee competency by learning how to use Track-IT web edition with DOVICO's free-Learning solution at www.dovico.com/versions/track-it_suite_v12_webedition_training.html. Or click the **Interactive Training** button from Track-IT web edition's Logon screen.

1. Start **Track-IT web edition**.

2. Different ways employees can enter time:

a) Use the **Timer** view to track time as you work (like a stopwatch). With the click of a mouse, this innovative tool eliminates the labor and takes the guesswork out of time keeping.

   i) Select the **Project** and **Task** from the list.
   ii) Click **Start** to start tracking time.
   iii) To stop, click the **Stop** button .

b) Use the **Bulk Time** view to enter your total hours worked for the day or week. This weekly grid allows hours worked to be quickly distributed across one or more days or projects.

   i) Select a **Week ending** date and click **Refresh**.
   ii) Select a **Project** and **Task** from the lists.
   iii) Enter the total hours for each day in the appropriate boxes.
   iv) Click **Save**.

3. To submit timesheets to your manager:

   a) Start Track-IT web edition.
   b) Click the **Submit** button .
   c) Select the **From** and **To** date range and click **Refresh**.
   d) Click **Submit**.

6 Custom Reports, Data Mining & Linking

Track-IT Suite includes a very powerful SQL database, which can be accessed directly through other applications. To assist you, we provide many free tools, code examples, file formats, custom reports, and other information from our web site.

1. **Custom Reports.** Edit any of the existing Track-IT Suite reports with Crystal Reports or Crystal Enterprise software available from www.crystaldecisions.com and add them directly to Track-IT. All custom reports are available to any employee whom you grant access (security report access) in Track-IT pro or Track-IT pro web.

   Visit our client web site for additional free custom reports:
   http://www.dovico.com/client.html

2. **Export any report** in Track-IT pro for further editing. Simply create the report and select the export button to move the report into another application (Excel, Word, Adobe, XML, etc.).

3. **Data mining or business intelligence tools** can be used to extract data directly from the Track-IT Suite database. For example, using Crystal Reports or Excel, you can easily select specific fields in the Track-IT database tables and create live links for your own data mining. Visit our Developers web site for code examples in XML, Database Schemas, Relationship Diagrams etc.
   http://www.dovico.com/developer.html

4. **Links with other software.** Links to Microsoft Project®, Microsoft Project Server®, and QuickBooks® are included with your purchase. However thanks to the Import/Export functionality, and ODBC compliant database, the Track-IT software can be easily linked to/from your other applications. Simply create a template to pull information from the database, and place it into your other applications. Visit our client website for template examples or contact DOVICO sales personnel for additional software links.
   http://www.dovico.com/client.html

5. **Linking through programming code** (for example, Visual Basic). If you have developed code to link to Track-IT Suite, you can post it on our web site, or to download or view add-on code examples that other developers have written (such as XML etc.), visit
   http://www.dovico.com/developer.html

7 Technical Support

To receive an update for Track-IT Suite or to receive the latest version of this document, visit our web site at http://www.dovico.com

General e-mail: info@dovico.com
Support e-mail: support@dovico.com
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Online Support form: http://www.dovico.com/support.html

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Fax: 1-506-384-0727

8 Manuals & Documentation

INFORMATIONAL DOCUMENTS:

- Detailed Installation Guide:
  http://www.dovico.com/KBase/WebHelp/detailedinstallguide/detailed_install_guide.html

- Downloadable Track-IT Suite Manuals, Instruction Guides, and other information:
  http://www.dovico.com/client.html

QUESTIONS:

- Frequently Asked Questions (FAQ's)… http://www.dovico.com/faq.html

- Online Knowledge Base (KBase)…. http://www.dovico.com/techtips.html

SOFTWARE HELP:

- **Help Files are included.** For help on particular topics, please refer to the individual component requiring help. The **Help index of Track-IT Suite** is over 8 MB of information to assist you.
- **What's this help** is included in Track-IT pro and Track-IT light. For help (click the at the upper right-hand corner of the screen then click any item, or simply go to that box and press **Shift + F1**. You can also search for help topics in the help file (select **Help**, **Help Contents and Index** from the menu).

- For additional usage ideas visit the client section of our corporate website at http://www.dovico.com/client.html

9 Informational Links

FREQUENTLY ASKED QUESTIONS… http://www.dovico.com/faq.html

APPLICATION LINKING AND DATABASE SCHEMATICS… http://www.dovico.com/developer.html

FREE REPORTS (DOWNLOADABLE)… http://www.dovico.com/reports.html

TRAINING & PROFESSIONAL SERVICES… http://www.dovico.com/faq8.html

CLIENT FILES & MANUALS… http://www.dovico.com/client.html

SEE A FEW CLIENTS AND PARTNERS… http://www.dovico.com/partners.html

SEE WHAT OUR CLIENTS ARE SAYING (REFERENCES)… http://www.dovico.com/faq15.html

SOFTWARE AWARDS… http://www.dovico.com/awards.html

PURCHASE INFORMATION… http://www.dovico.com/purchase.html

TIME & PROJECT MANAGEMENT ARTICLES… http://www.dovico.com/tips.html

CORPORATE INFORMATION… http://www.dovico.com/about.html

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