

touchTrac user guide
for windows[®]



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Prerequisites

touchTrac is a kiosk-type Windows program that runs on tablets or computers, with or without a touchscreen, operating Windows XP, 7, or 8. Designed for multiple-employee use, touchTrac is ideal for employees working within close range of one or more touchTrac stations.

A license is required to run the touchTrac software at each touchTrac station. However, there is no limit to the number of employees that are able to use the touchTrac stations for data capture.

TracManager Setup for touchTrac

Assign an Employee as a touchTrac User

All employees that are not assigned to pcTrac may use touchTrac for data capture. Employees using touchTrac log in with their Employee ID or alternate ID. An optional PIN may also be assigned. Optional touchTrac login credentials may be assigned in TracManager by accessing the Time & Payroll tab> Employee Center> Additional Information tab.

Help Lists for touchTrac

Employees who will be using touchTrac must be assigned to a Workgroup. Each Workgroup has an associated Help List. A Help List is a list of predefined data selections to aid employees in the selection of information. Each Workgroup must contain a Help List for both Jobs and Activities. An optional Material Help List may be created if utilizing Materials.

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 may 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.

Initial touchTrac Registration

When touchTrac runs for the first time, the software will automatically register with the TracManager program will assign one of the available touchTrac licenses. touchTrac stations will not appear on the Computer Name list until the stations have been installed and registered with TracManager.

Once the touchTrac Station is registered, select from the Time & Payroll menu Setup>touchTrac Stations. Select the touchTrac computer name from the drop down list; set the universal preferences and default language preference for the selected station. The preferences are set for the touchTrac Station not individual users. Configuring the prompts and choices for each workgroup on the touchTrac station allows or limits the information that the employees in each workgroup may enter or view.

Configuring the touchTrac Station

Configuring the touchTrac station allows or limits the information that employees may enter and view. The touchTrac station is configured in two parts: the settings for the physical touchTrac computer station and the workgroup settings for the employee menu prompts.

To configure the touchTrac Station, select from the menu Setup>touchTrac Stations. Preferences, default language, time tracking menu choices, and additional configuration settings may be selected for each touchTrac Station and employee workgroup.

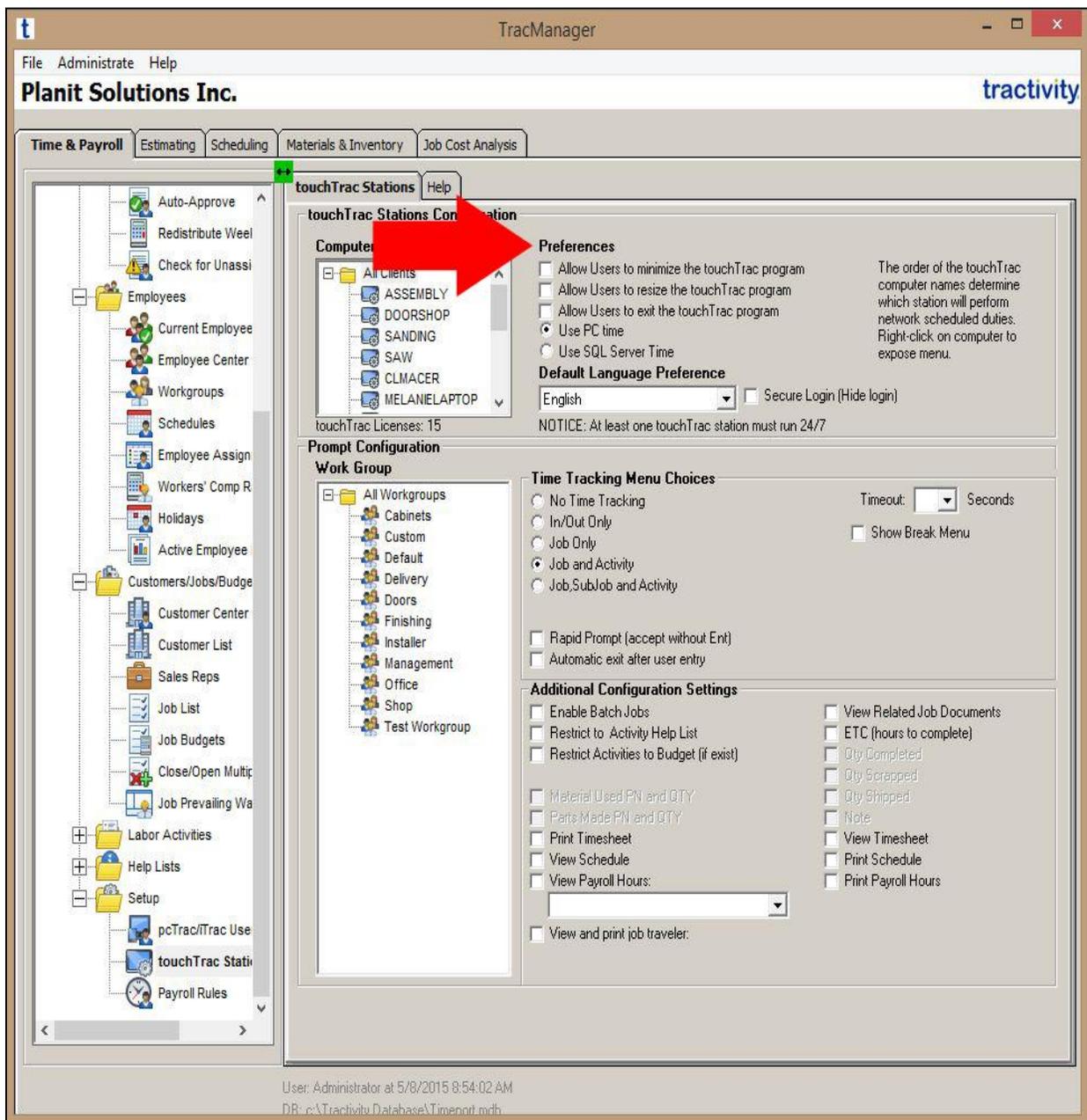
The screenshot displays the TracManager application window for Planit Solutions Inc. The interface includes a menu bar (File, Administrate, Help) and a navigation pane on the left with categories like Time & Payroll, Estimating, Scheduling, Materials & Inventory, and Job Cost Analysis. The 'touchTrac Stations' menu item is highlighted with a red arrow. The main window shows the 'touchTrac Stations Configuration' dialog, which is divided into several sections:

- touchTrac Stations Configuration:** Includes a 'Computer Name' dropdown menu with options like ASSEMBLY, DOORSHOP, SANDING, SAW, CLMACER, and MELANIELAPTOP. It also has 'Preferences' for minimizing, resizing, and exiting the program, and 'Default Language Preference' set to English.
- Prompt Configuration:** Includes a 'Work Group' dropdown menu with options like Cabinets, Custom, Default, Delivery, Doors, Finishing, Installer, Management, Office, Shop, and Test Workgroup.
- Time Tracking Menu Choices:** Includes radio buttons for 'No Time Tracking', 'In/Out Only', 'Job Only', 'Job and Activity', and 'Job,SubJob and Activity'. It also has a 'Timeout' field and a 'Show Break Menu' checkbox.
- Additional Configuration Settings:** Includes checkboxes for 'Enable Batch Jobs', 'Restrict to Activity Help List', 'Restrict Activities to Budget (if exist)', 'Show Customer', 'Material Used PN and QTY', 'Parts Made PN and QTY', 'Print Timesheet', 'View Schedule', 'View Payroll Hours', 'View and print job traveler', 'View Related Job Documents', 'ETC (hours to complete)', 'Qty Completed', 'Qty Scrapped', 'Qty Shipped', 'Note', 'View Timesheet', 'Print Schedule', and 'Print Payroll Hours'.

At the bottom of the window, the status bar shows: User: Administrator at 5/8/2015 8:54:02 AM and DB: c:\Tractivity Database\Timeport.mdb.

Setting touchTrac Station Preferences

The preferences are set for the touchTrac Station itself, not for the individual users. Select a computer name from the computer name list, then set preferences and default language for the selected computer name. NOTE: Preference changes will only effect the computer name that is selected.



To configure the touchTrac Station, select from the menu Setup>touchTrac Stations. Select the touchTrac Station from the Computer Name list. Once the computer name is selected, preferences may be set along with the default language preference. Time tracking menu choices and additional configuration settings can also be set for each selected workgroup.

Check the checkboxes to allow: Users to minimize the touchTrac program, resize the touchTrac program, and/or exit the touchTrac program.

It is recommended that these three preference options are checked until the installations are fully tested and ready to operate. Later, if the touchTrac Station is solely dedicated to running touchTrac, and access to other programs is not necessary, then uncheck the first three preference options.

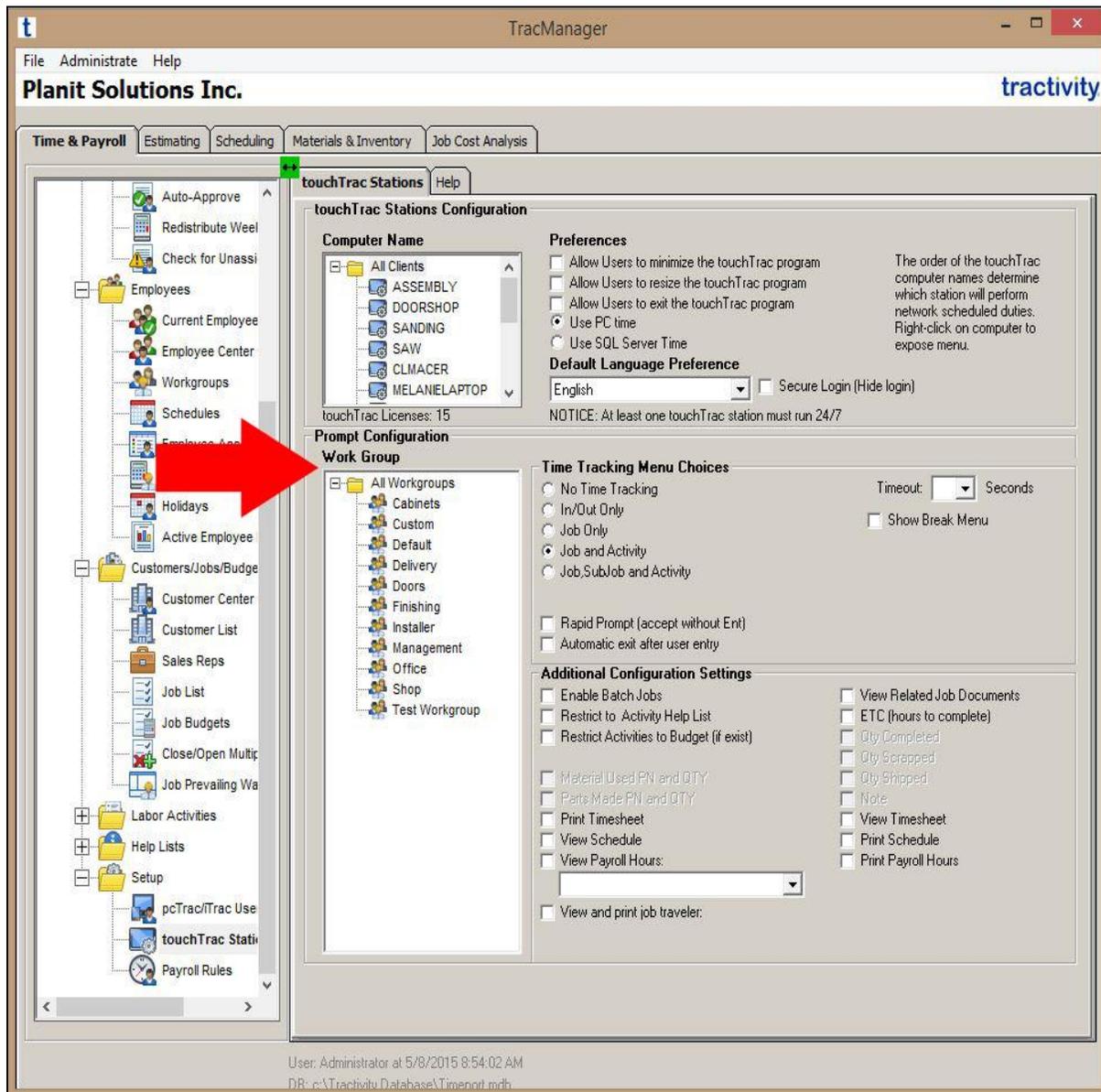
If all three preference options are unchecked, then only the Administrator may exit the program by entering the administrator password numerically as the employee ID. Passwords can be translated from alpha to numeric using standard translation: 2=ABC, 3=DEF, 4=GHI, 5=JKL, 6=MNO, 7=PQRS, 8=TUV, 9=WXYZ. Once the administrator password is entered, a file menu will appear across the top of the touchTrac screen. From that menu, the Administrator may select File>Exit to exit the touchTrac program.

Default Language Preference: If a language preference is applicable the default language may be selected from the Default Language Preference drop down menu.

Prompt Configuration

Configuring the prompts and choices for each workgroup on the touchTrac station allows or limits the information that the employees may enter or view.

The employee menu prompts and configuration settings and choices are set for each workgroup, not for the individual touchTrac Station.

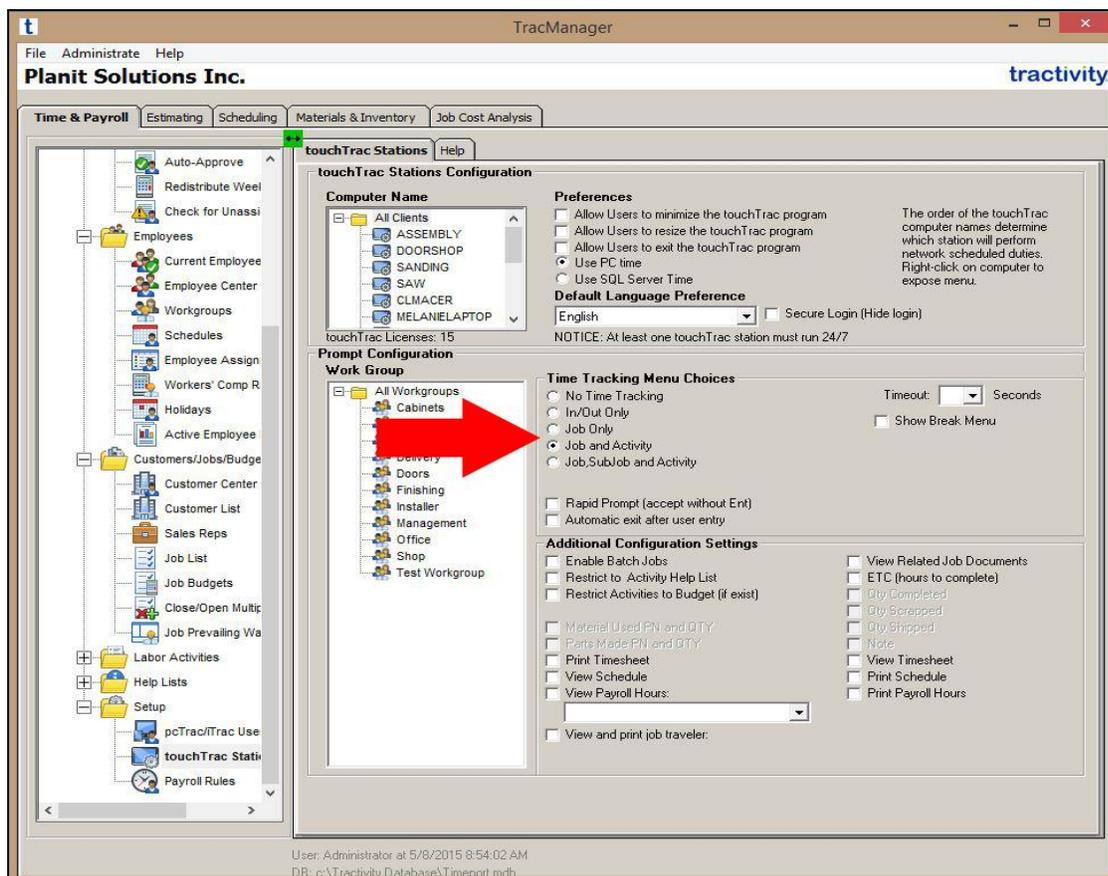


To configure the workgroups, select from the menu Setup>touchTrac Stations. Select a workgroup name from the workgroup name list, then set time tracking menu choices and additional configuration settings for the selected workgroup. NOTE: Preference changes will only effect the workgroup name that is selected.

To configure all workgroups exactly the same, select the All Workgroups folder in the Workgroup list, then make changes.

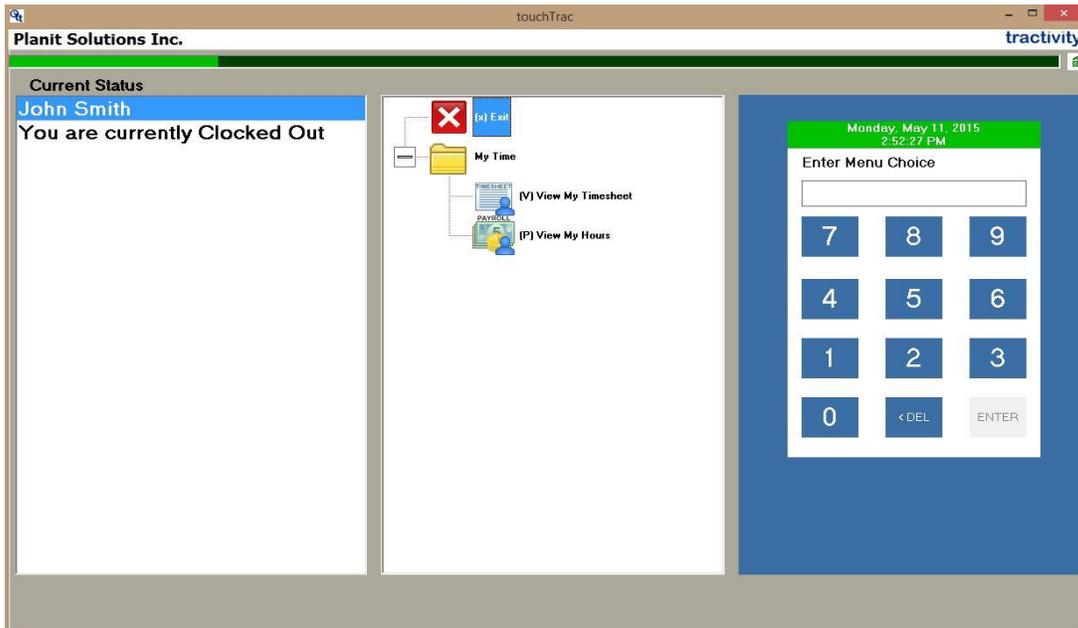
If each workgroup will be configured differently, select a workgroup from the workgroup list. Set the choices for that workgroup, then repeat for any remaining workgroups.

Time Tracking Menu Choices: The touchTrac menu choices may be configured in a variety of ways depending on company and employee needs.

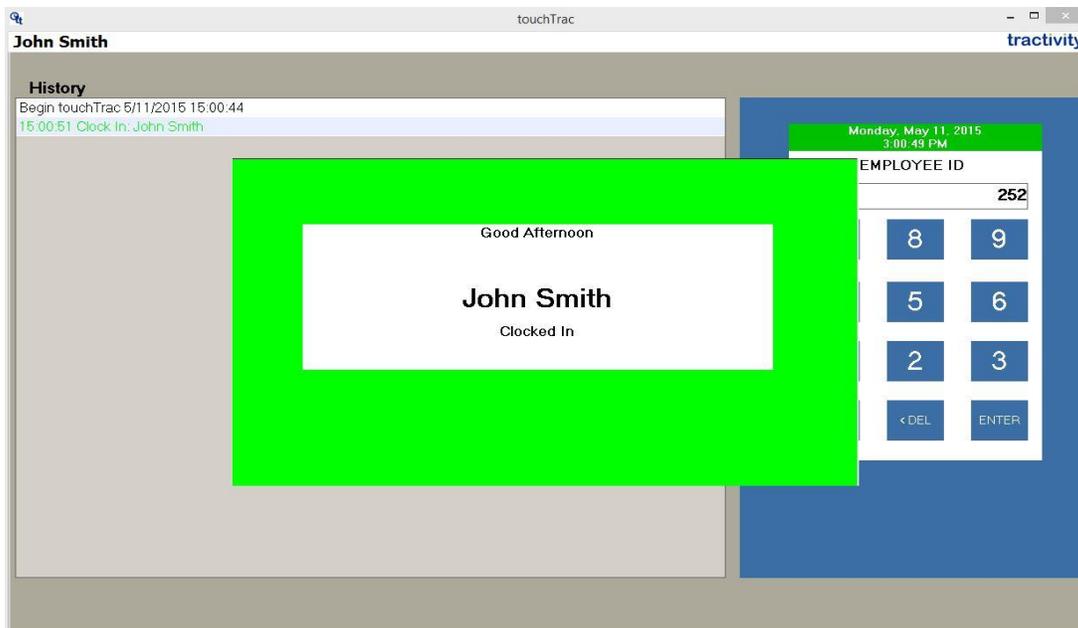


Select ONE of the following methods for data collection.

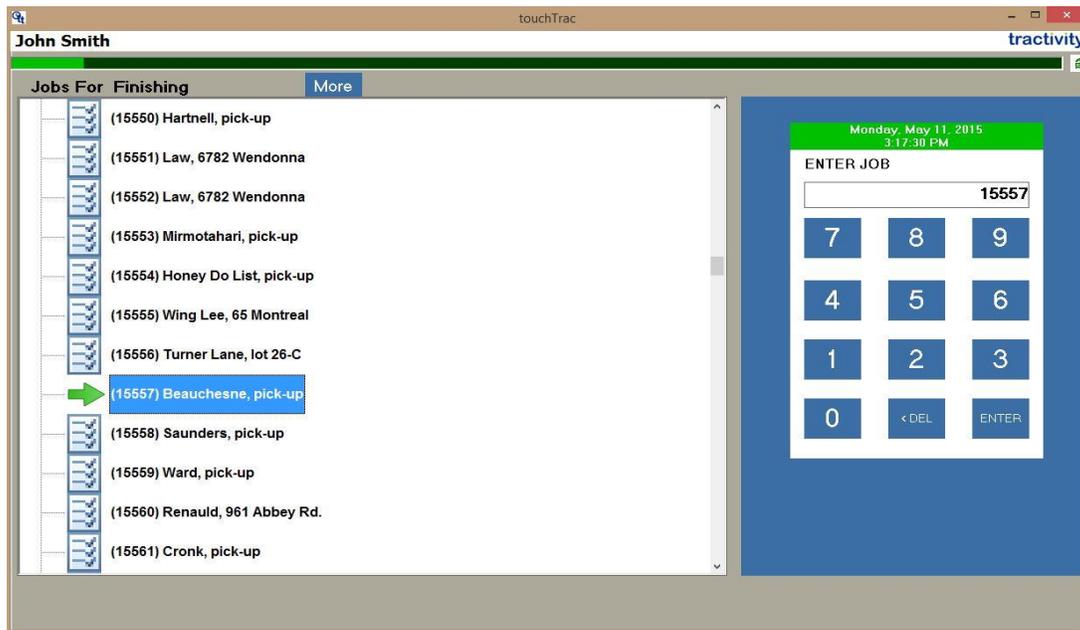
- *No Time Tracking* – Time tracking for employees will not occur. This option would only be used if the touchTrac station was solely used for viewing payroll and schedules, and never for entering time.



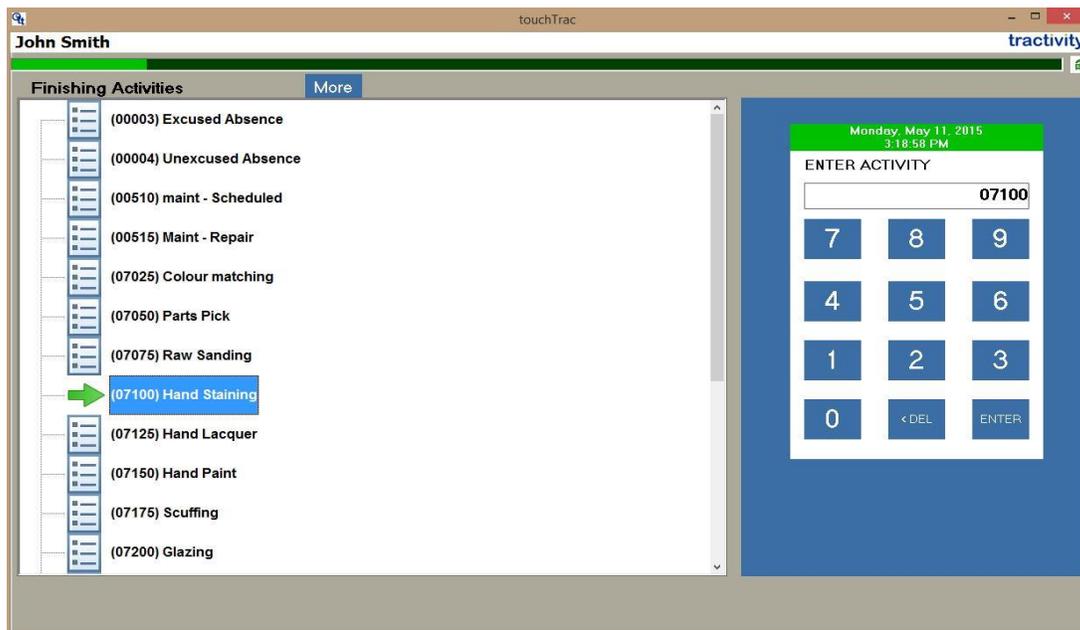
- *In/Out Only* – Employees may clock into a default Job and default Activity, and clock out.



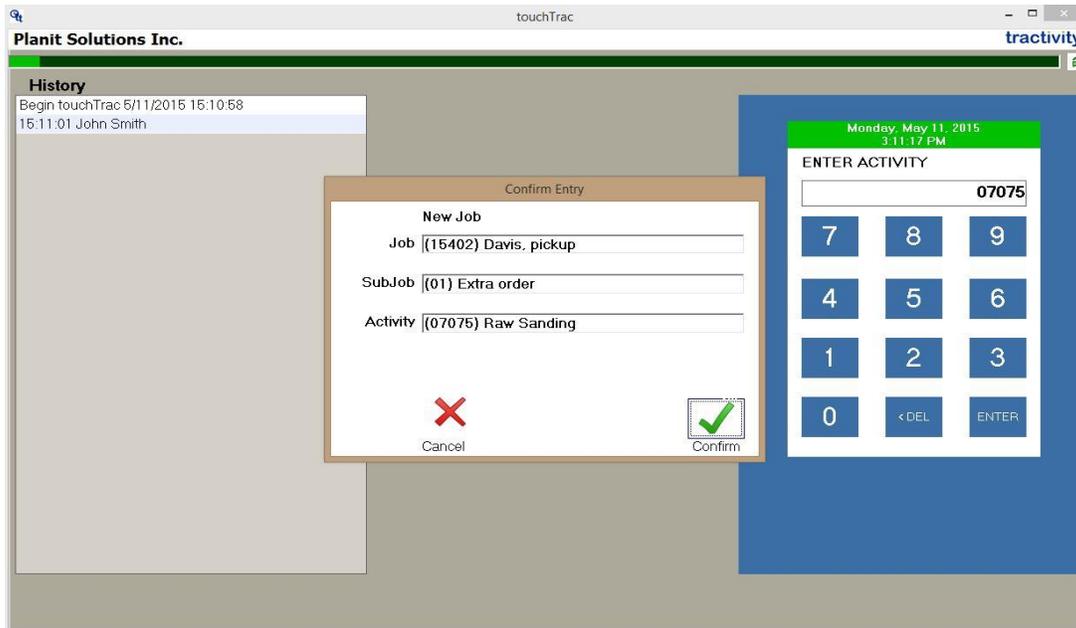
- *Job Only* – Employees may clock in, select a job from the Job Help List, select a default Activity, and clock out.



- *Job and Activity* – Employees may clock in, select a job from the Job Help List, select an activity from the Activity Help List, and clock out.



- *Job, SubJob, and Activity* – Employees may clock in, select from the Job Help List, Phase Help List, and Activity Help List, and clock out. The subjob caption is customizable and may be renamed to phase, item, room, etc.



Select or deselect additional menu options for the selected workgroup's configuration.

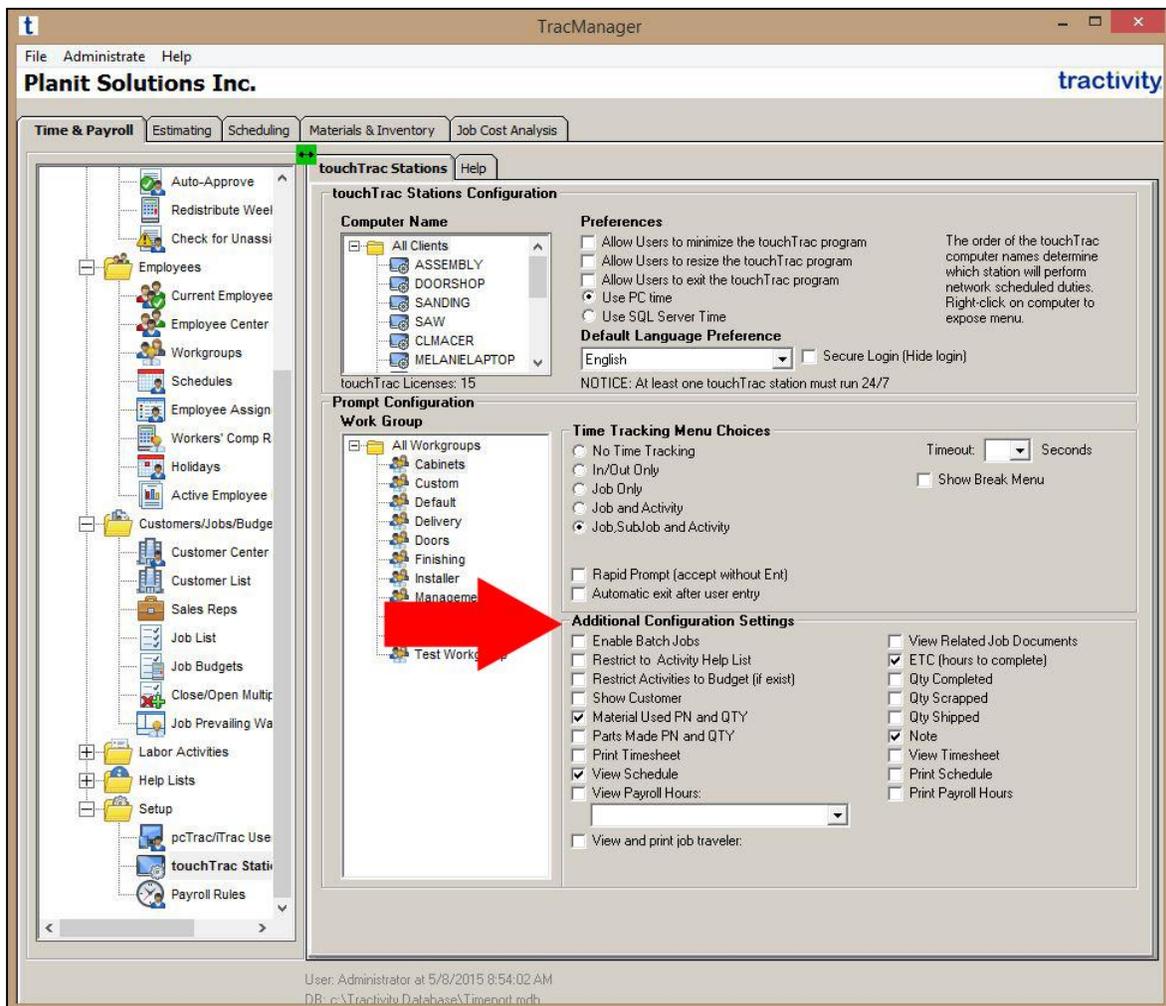
- *Timeout* - The touchTrac may be configured to end the employee's touchTrac session after a specified amount of time of inactivity. The specified amount of time can range between 15 and 300 seconds depending on the environment and the amount of time needed for employees to make their entries.
- *Rapid Prompt (recommended)* - Data may be entered without requiring the user to press the Enter key.
- *Secure Login* – The login field may be set to hidden for added security.
- *Automatic exit after user entry (recommended)* - After each user completes an entry, the touchTrac Station will automatically return to the login prompt screen.

Additional Configuration Settings

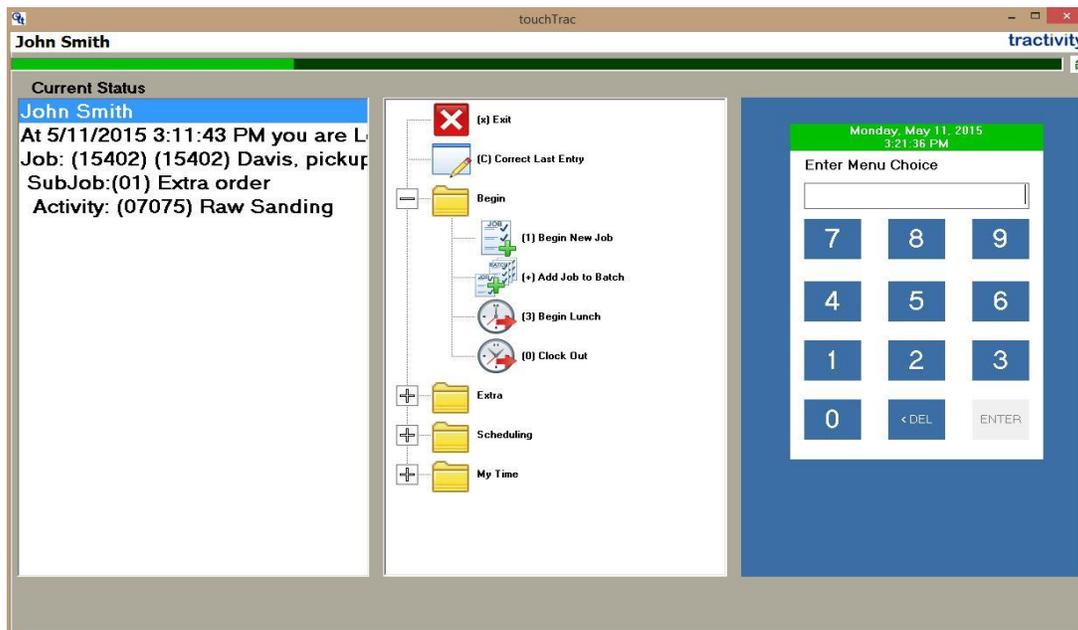
To configure the additional settings select from the menu Setup>touchTrac Stations. Select a workgroup name from the workgroup list. Once the workgroup name is selected, additional configuration settings may be set. NOTE: Additional Configuration Settings will only effect the workgroup name that is selected.

To configure all workgroups exactly the same, select the All Workgroups folder in the Workgroup list, then make changes.

If each workgroup will be configured differently, select a workgroup from the workgroup list. Set the choices for that workgroup, then repeat for any remaining workgroups.

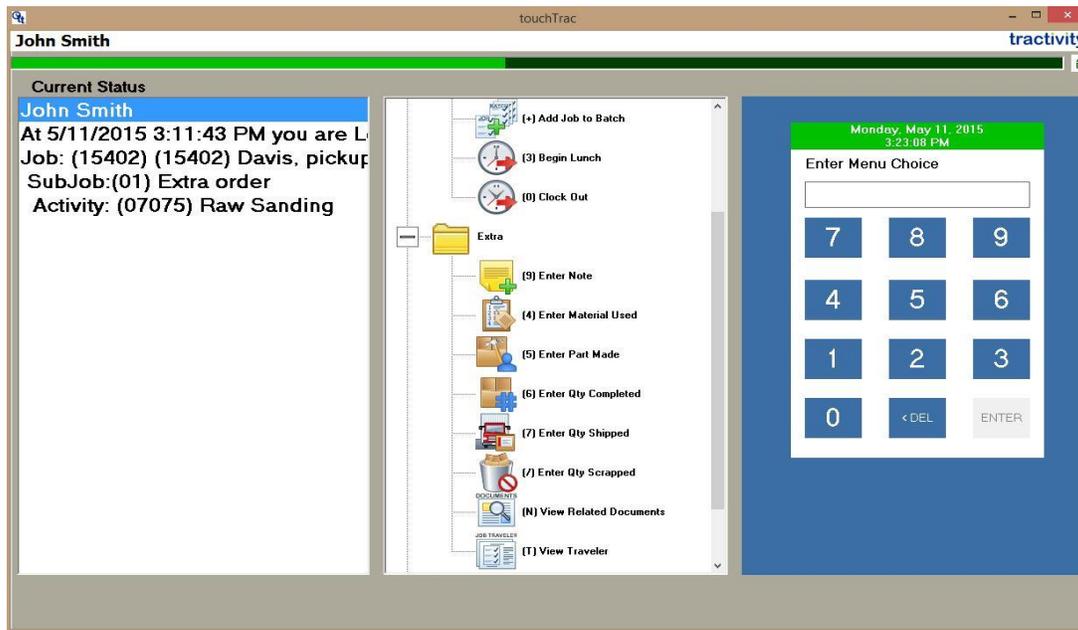


Check the checkboxes for the following additional configuration settings.



- *Enable Batch Jobs*
- *Restrict to Activity Help List* – displays only the Activities assigned to the specified Workgroup's Activity Help List. If unchecked all Activities will be displayed.
- *Restrict Activities to Budget (if exists)* – Only Activities with Budgets will be visible. Activities without a budget will not appear and cannot be selected.
- *Show Customer*
- *Prompt for Sequence* – rarely used, but allows a sequence number to be input.

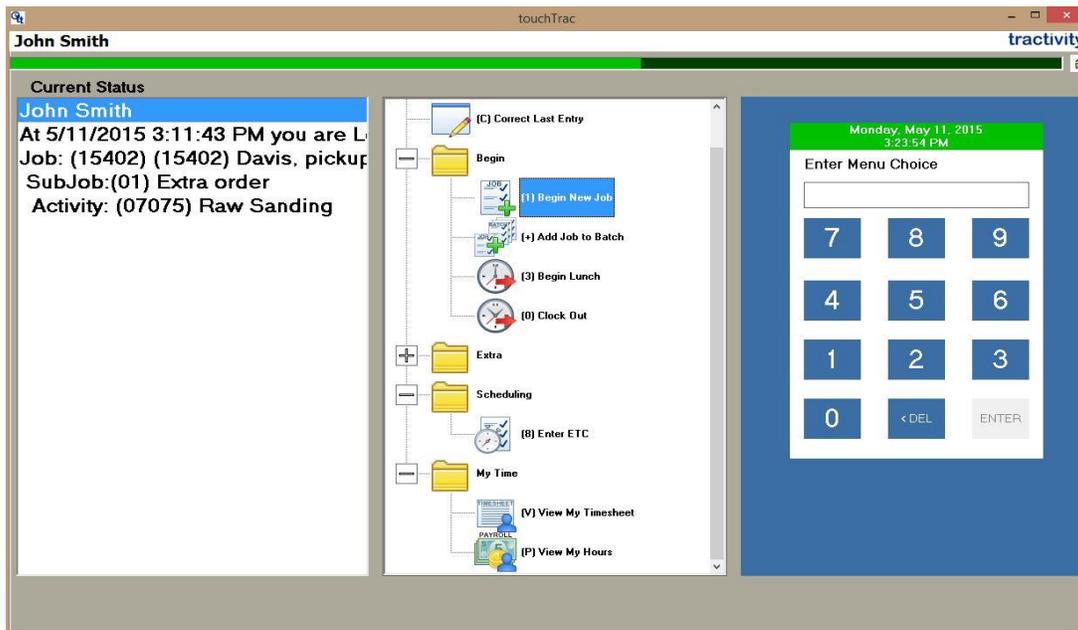
Check the checkboxes for the following job related transaction selections.



- *Enter Note* – allows employees to enter notes associated with their current Job or Activity. Notes entered by employees will appear on their timesheet and on the Current Employee Activity screen.
- *Material Used PN and QTY* – utilizes the Material Help List and allows the touchTrac user to select both the material part number and quantity used from the Material Help List associated with their current Job/Activity.
- *Parts Made PN and QTY* – if making parts, the part number and quantity can be entered.
- *Qty Completed* – allows the entry of complete material or parts quantities.
- *Qty Shipped* – allows the entry of quantity shipped.
- *Qty Scrapped* – allows the entry of scrapped materials.
- *View Related Documents (associated with the current job)* – allows the employee to view related documents associated with the current job. The touchTrac station must have the necessary software installed in order to open and view the attached documents.

- *View and print Job traveler* –allows the employee to view the associated Job Traveler for the job selected.

Check the checkboxes for the following ancillary information access selections.

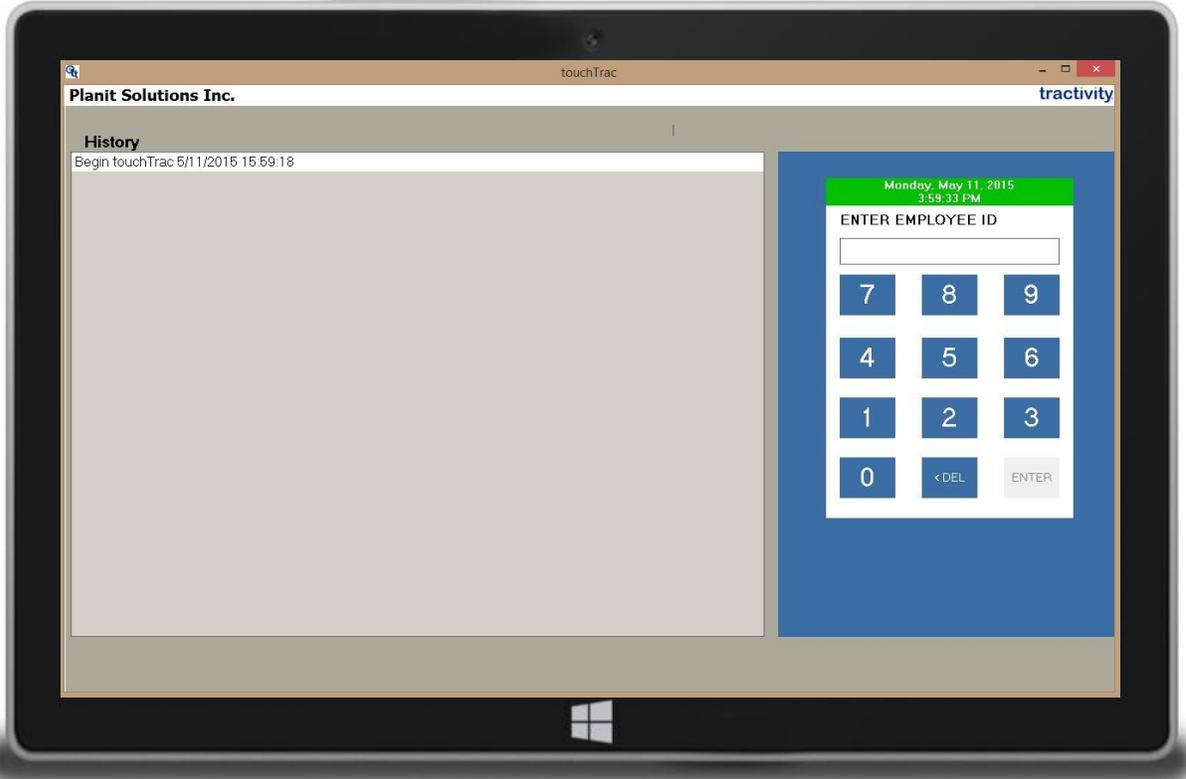


- *ETC* –allows the touchTrac user to set the ETC (estimated time to complete).
- *View Timesheet* – when checked, allows the employee to view their timesheet.
- *View Payroll Hours* – allows the employee to view their payroll hours for the period selected in the drop down box, e.g., week, two weeks, bi-monthly, monthly.
- *View Schedule* – when checked, allows the employee to view their work schedule.
- *Print Timesheet* – when checked, allows the employee to print their timesheet.
- *Print Schedule* – when checked, allows the employee to print their schedule.
- *Print Payroll Hours* – when checked, allows the employee to print their payroll hours.

Started Using touchTrac

touchTrac users are assigned an Employee ID, alternate ID, or additional PIN. Alternate ID login or additional PIN's may be set up in the Employee Center under the Additional Information tab.

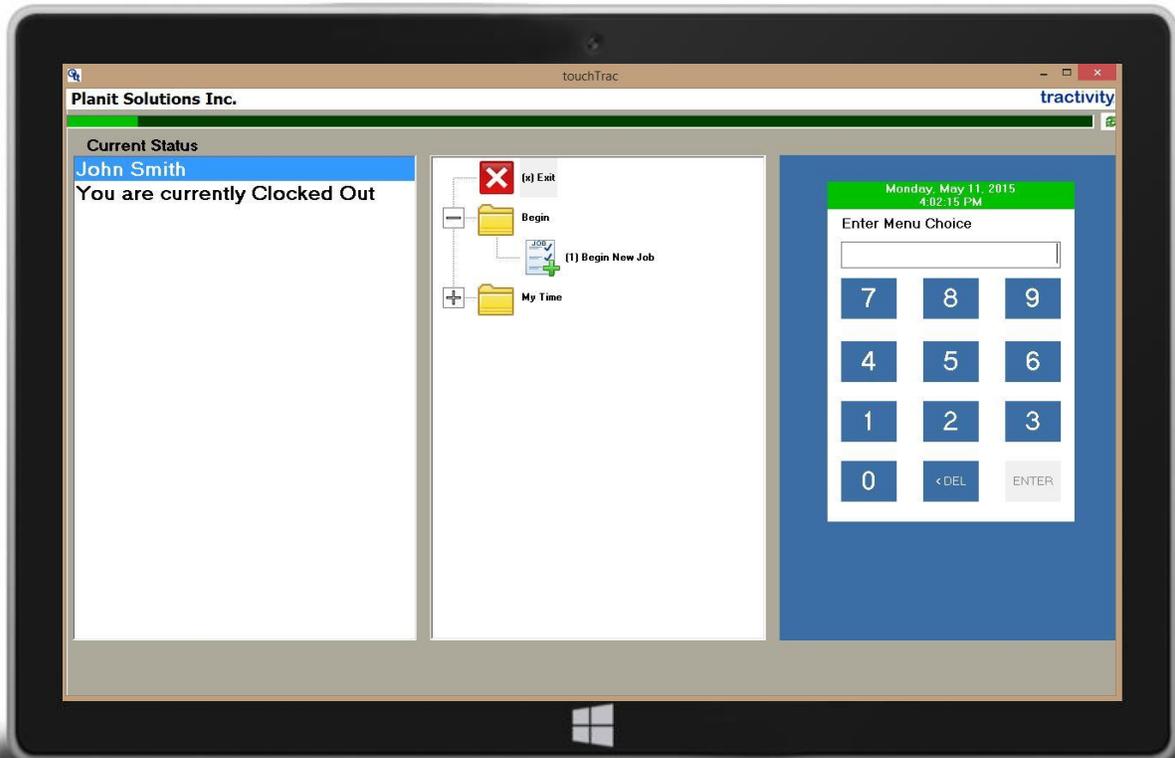
Entries may be made using the touchscreen, numeric keypad, computer mouse, or keyboard. Menu shortcuts appear in parenthesis beside each menu item and may be selected by entering the number and pressing Enter. Depending on the touchTrac menu configurations, a timeout bar may appear at the top of the screen. Select the Refresh symbol to prevent timing out.



NOTE: Based on the touchTrac configuration settings and preferences, menu items may appear differently. For instructional purposes, the following screenshots will show a touchTrac Station configured for Job, SubJob, and Activity menu choices, with all additional configuration setting options enabled.

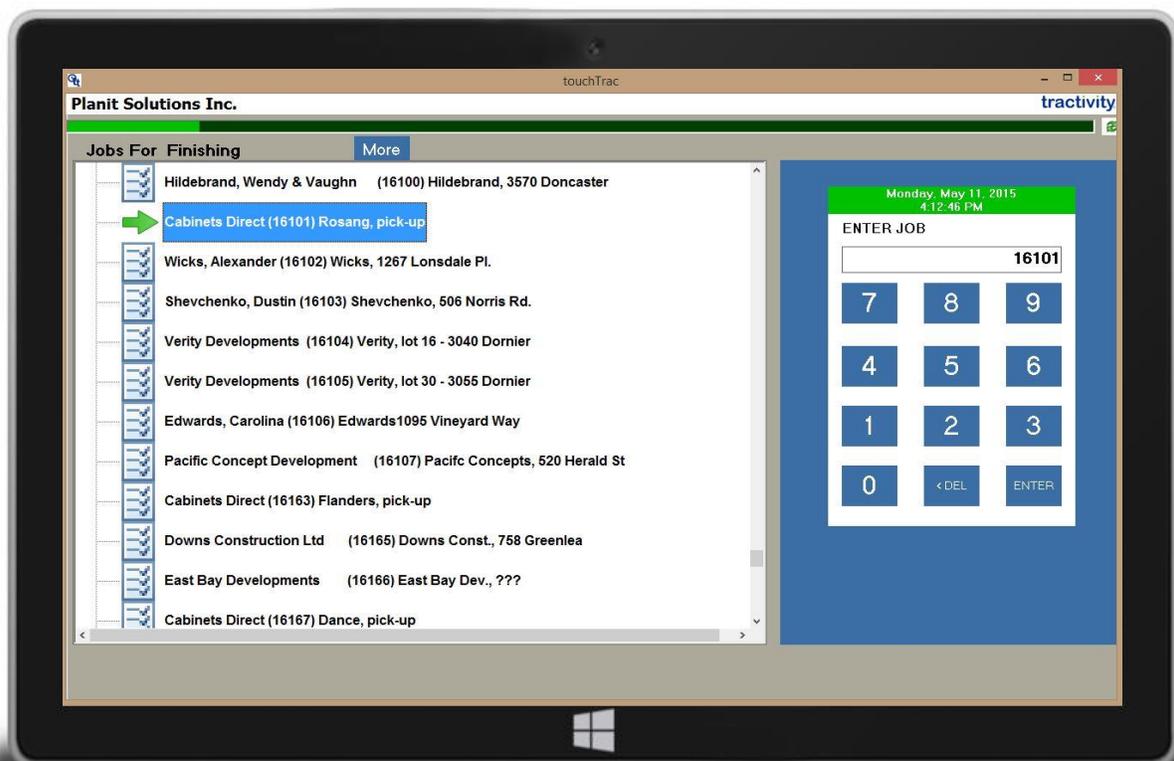
Clock In - Begin Job

Using the screen keypad or keyboard, enter your employee login information and press enter to clock in for the day.



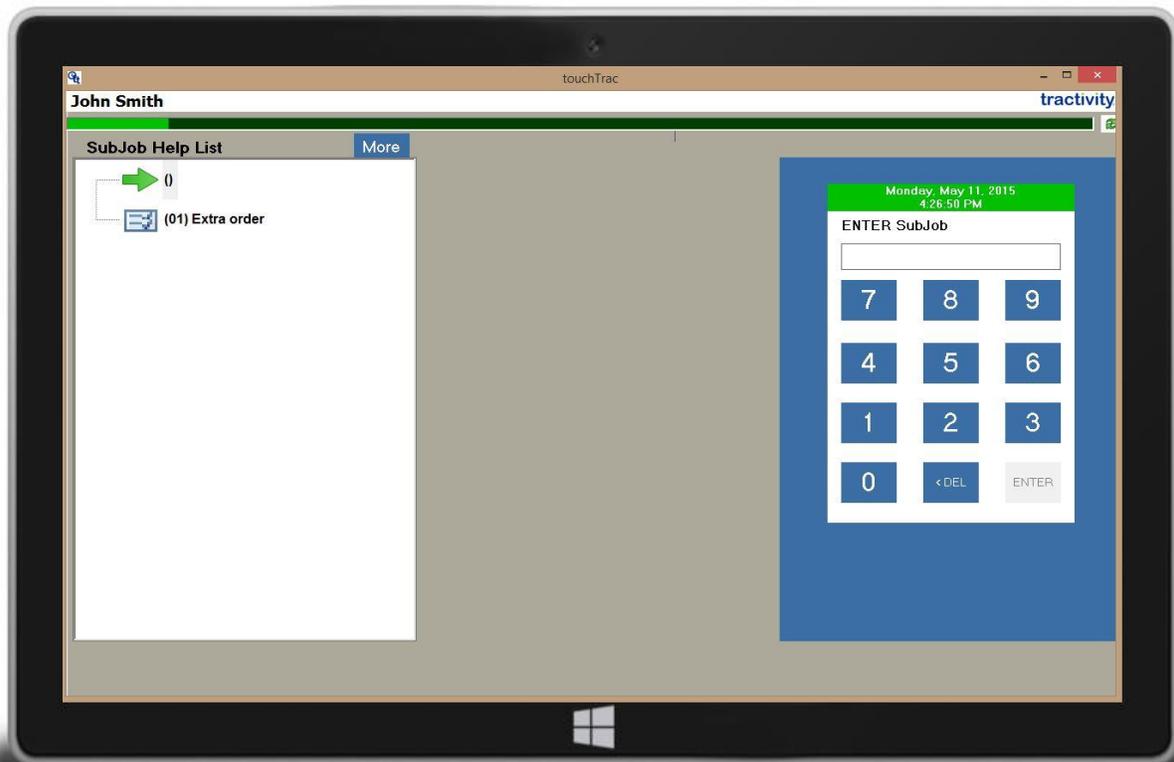
Select Job

Select Begin Job or menu shortcut (1). Select the Job that you will now begin. Scroll through the Help List and chose the Job or enter the Job Code (in parenthesis) using the numeric keypad. If the job does not appear on the list, select the More button to view all available jobs. Select Enter.



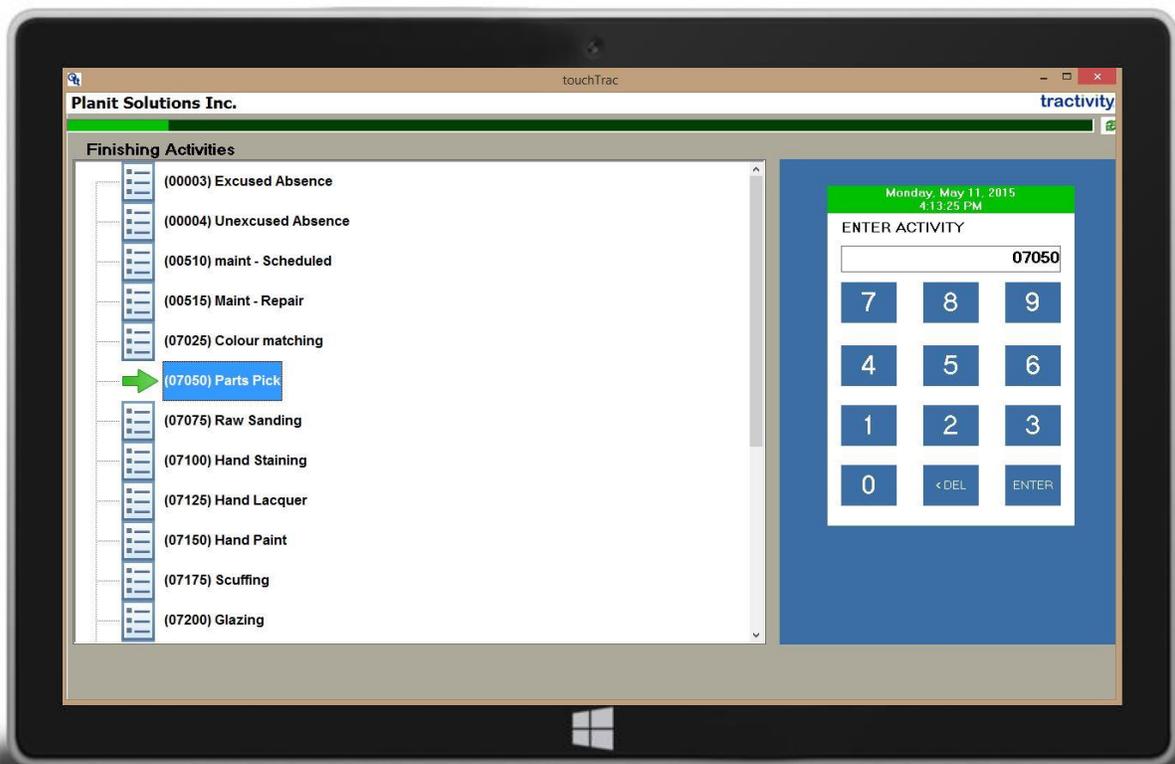
Select Phase (if applicable)

Select the Job Phase for the Job that you will now begin. Choose the Job Phase from the Help List, or enter the code using the numeric keypad. If the phase does not appear on the list, select the More button to view all available phases. Select Enter. NOTE: If only one phase is associated with the job, touchTrac will automatically select the phase without a prompt.



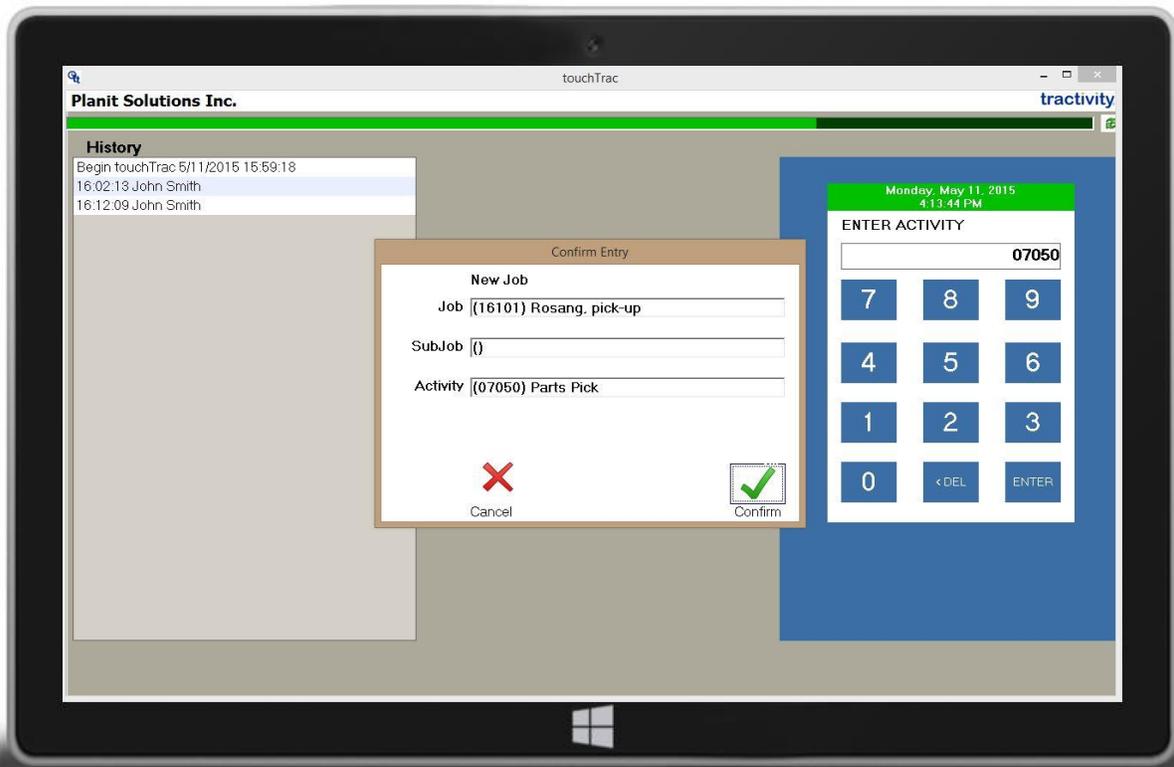
Select Activity

Select the Activity for the Job that you will now begin. Chose the Activity from the Help List, or enter the code using the numeric keypad. If the Activity does not appear on the list, select the More button to view all available activities. (The More button will only appear if not restricted in the TracManager Additional Configuration Settings). Select Enter.



Verify Entry

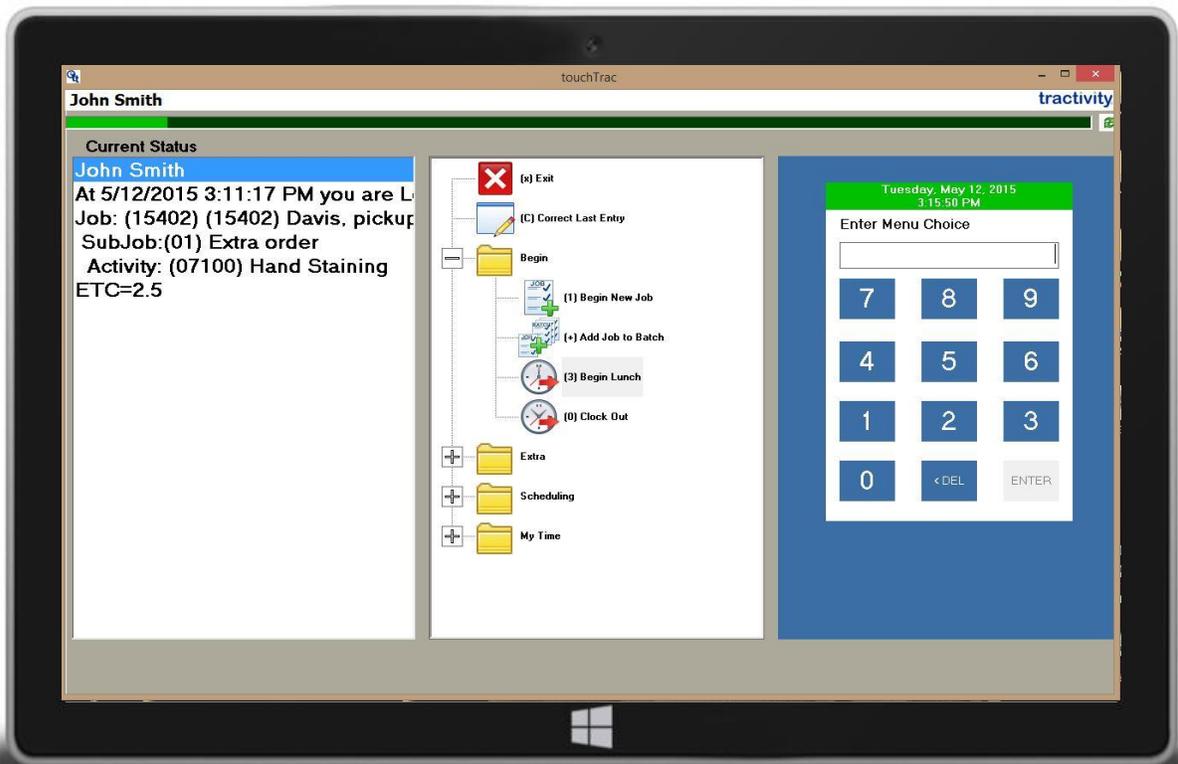
Verify the Job, Job Phase (if using), and Activity that you will now begin. Select Confirm if correct. Select Cancel if incorrect.



Lunch

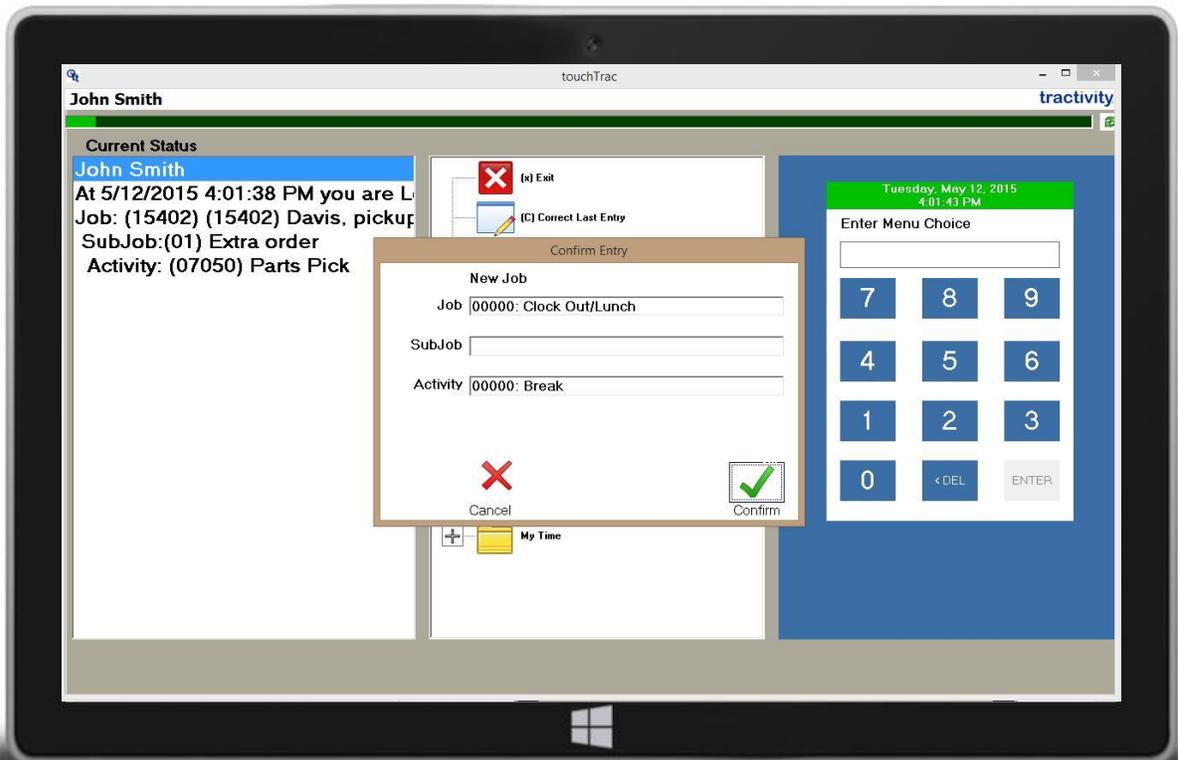
Select Begin Lunch when you are taking a lunch break. When you are ready to return to work, select Return Lunch. Selecting Return Lunch will automatically clock you into the same Job and Activity selected prior to taking a lunch break.

Alternately, you may clock into Job Code 0 to take your Lunch Break; then, when you return from break you may clock into the Job and Activity you will begin.



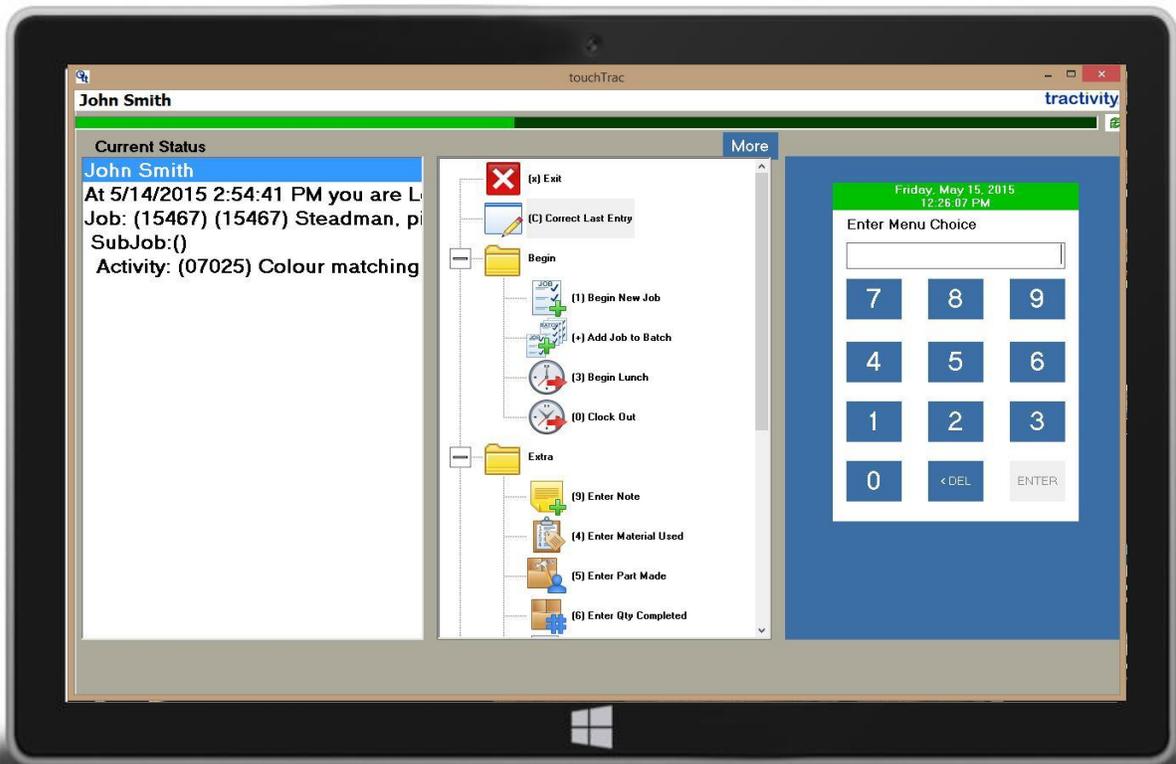
End Day – Clock Out

When your work day is finished, select Clock Out. Select Confirm to end your day or Cancel to continue working. The Clock Out entry informs the touchTrac station that your timesheet may now be processed and you will be logged out of touchTrac.



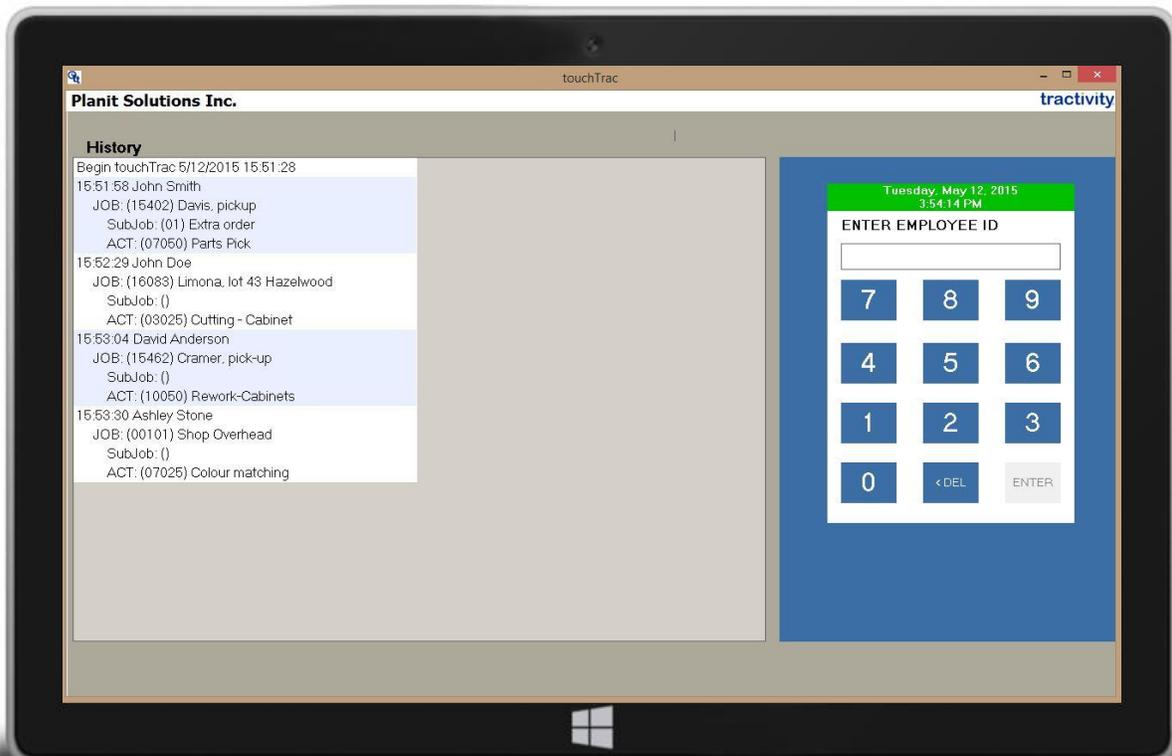
Correct Last Entry

Enter employee ID to login. Select Correct Last Entry or menu shortcut (c). Select the corrected Job, Phase, and Activity. Scroll through the Help Lists, chose the Job, Phase, and Activity or enter the codes (in parenthesis) using the numeric keypad. Select Enter. NOTE: Only the last entry may be corrected. If major data entry mistakes occurred, enter a note for the Supervisor.



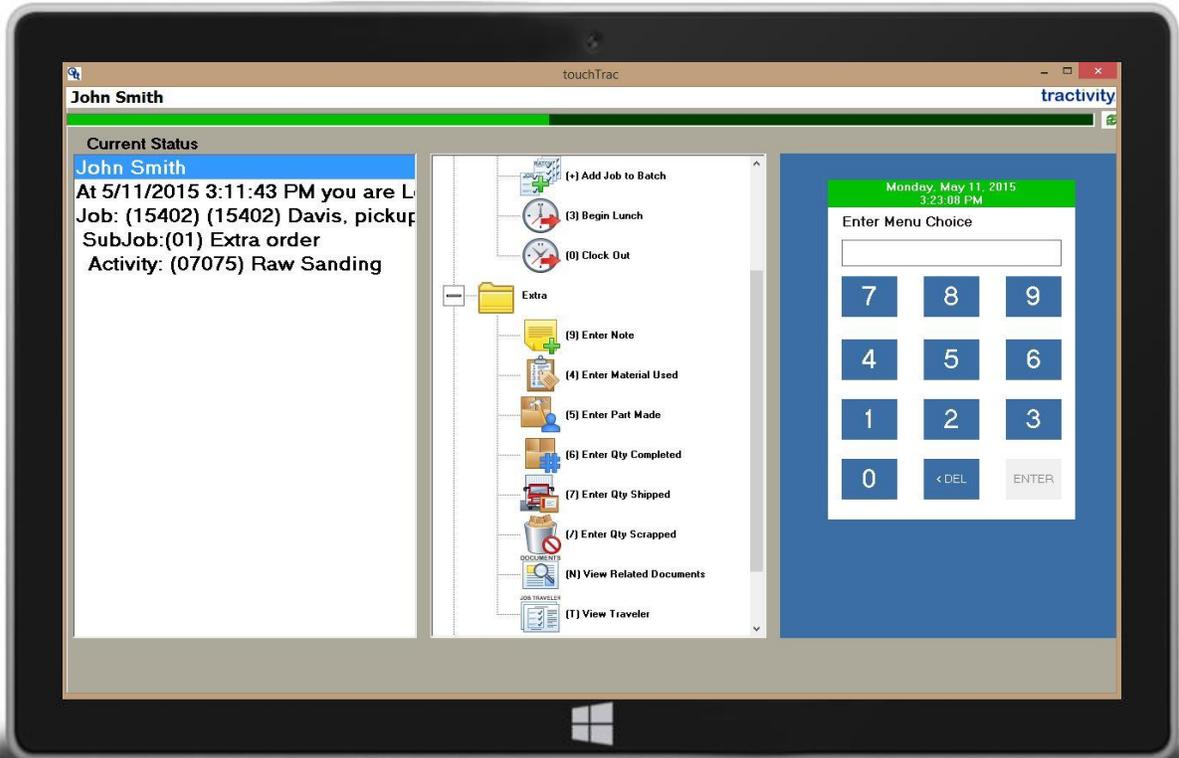
History Log

The History Log shows all employee entries, both current and past, on the touchTrac station.



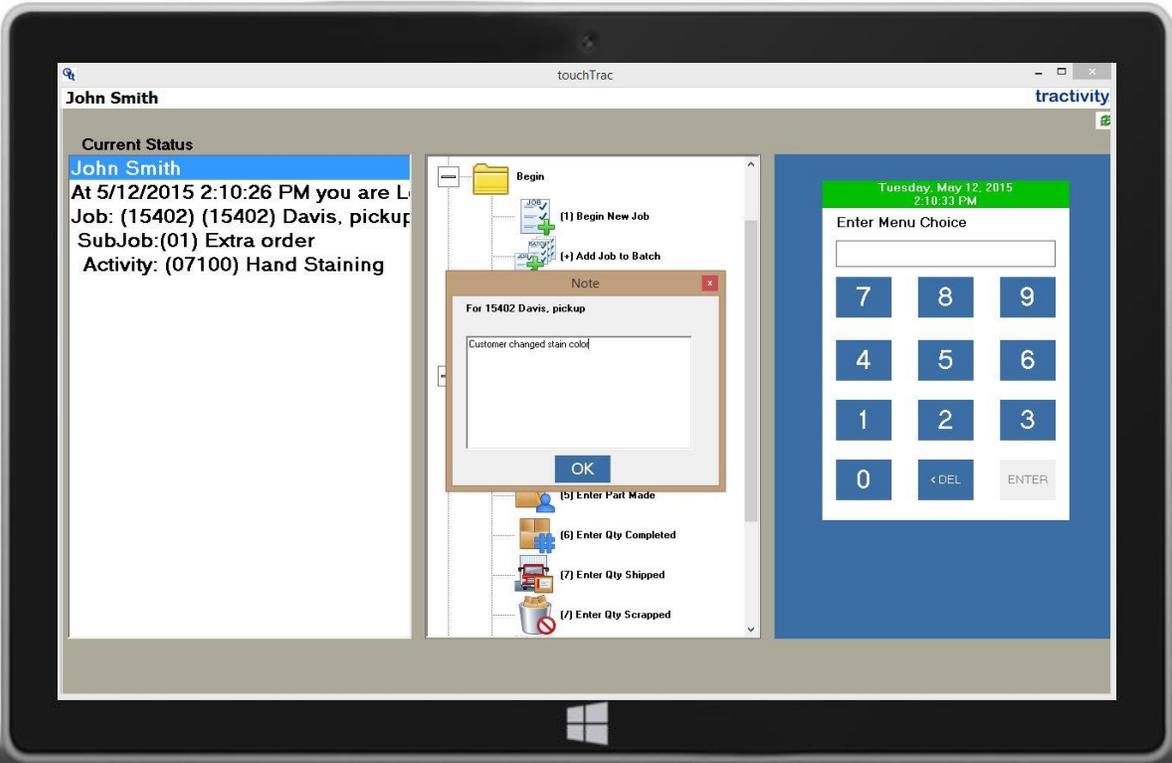
Additional Menu Choices

Employees may easily add detailed information to their current Job. Depending on the employee's workgroup configuration, employees may enter notes for their current Job, enter Materials to be charged to the Job, Quantity Completed, ETC, Quantity Shipped or Scrapped, view Related Documents, or view Job Traveler information. Employees may also view and print their Timesheet, Payroll Hours, and Schedule.



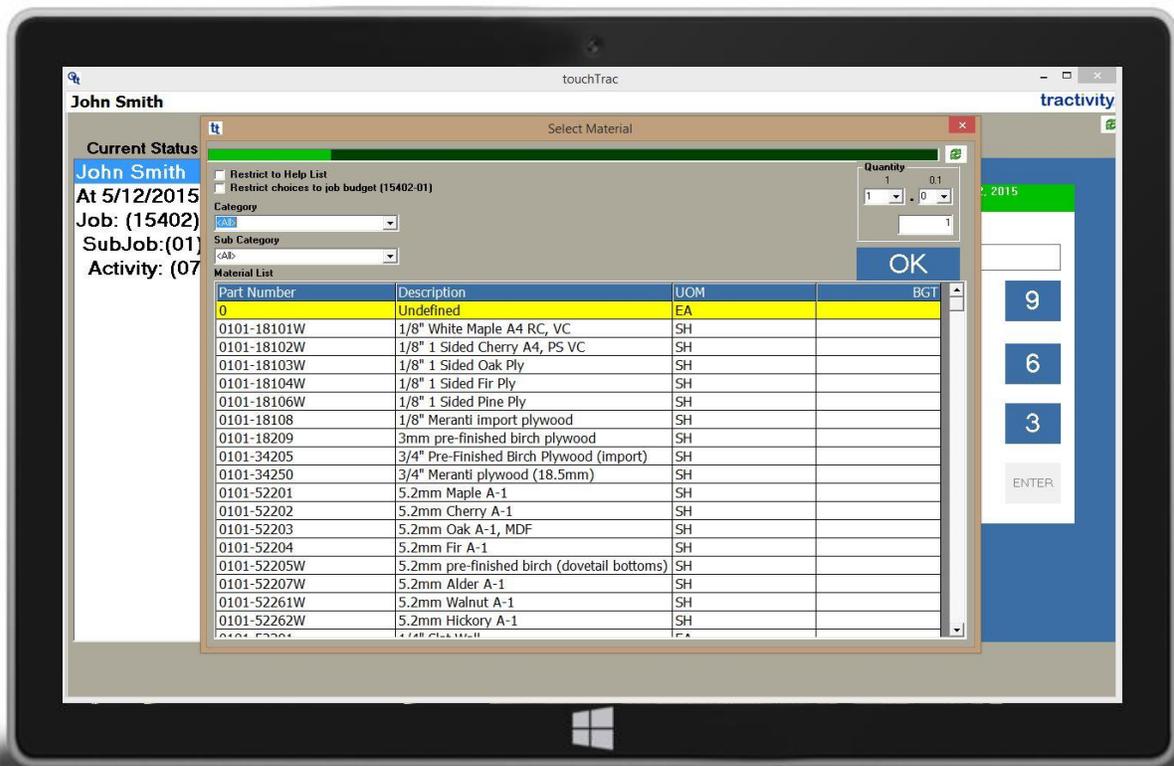
Note

Enter a note for the current Job. Select OK. Note entries appear on the History Log and are associated with current Job and Activity. Notes will appear in TracManager on the Current Employee Activity view and employee Timesheet.



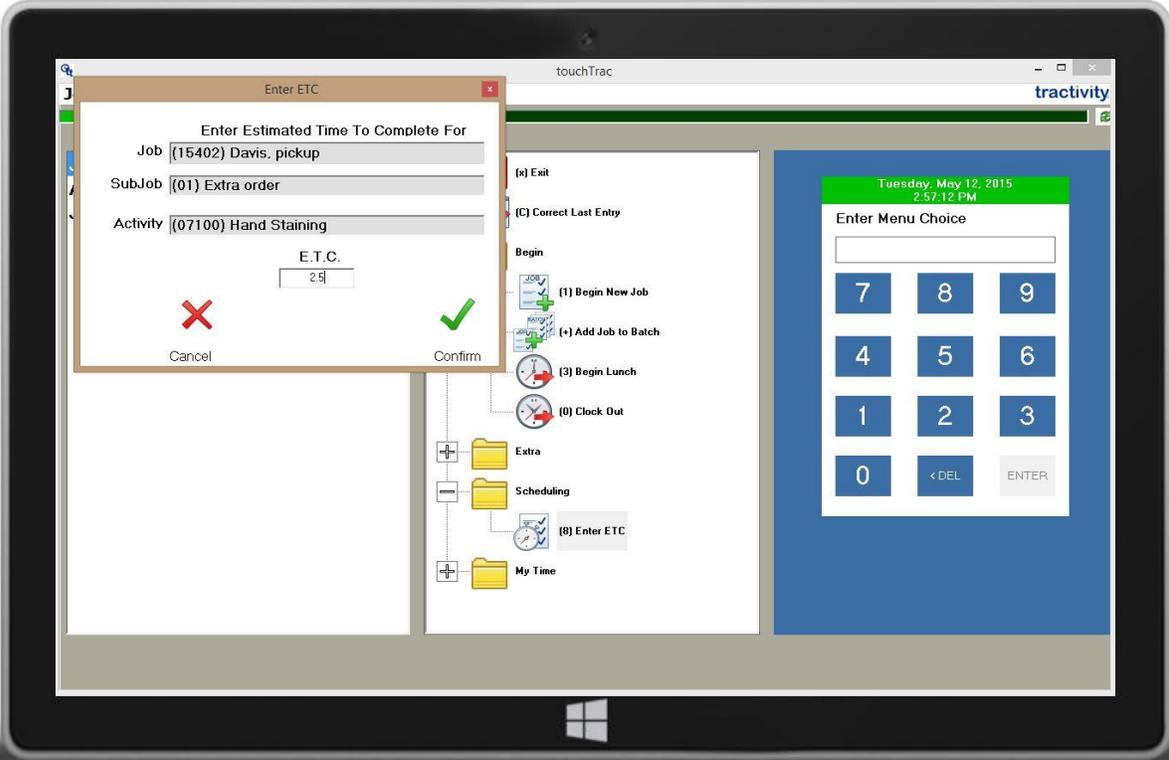
Material Used

Enter the Material used on the current Job by selecting the Part Number from the Material List. Using the drop down selector, select the quantity. Select OK. Material entries associated with the Job and Activity appear in TracManager on the Employee's Timesheet. When the Timesheet is approved, the Material gets charged to the Job.



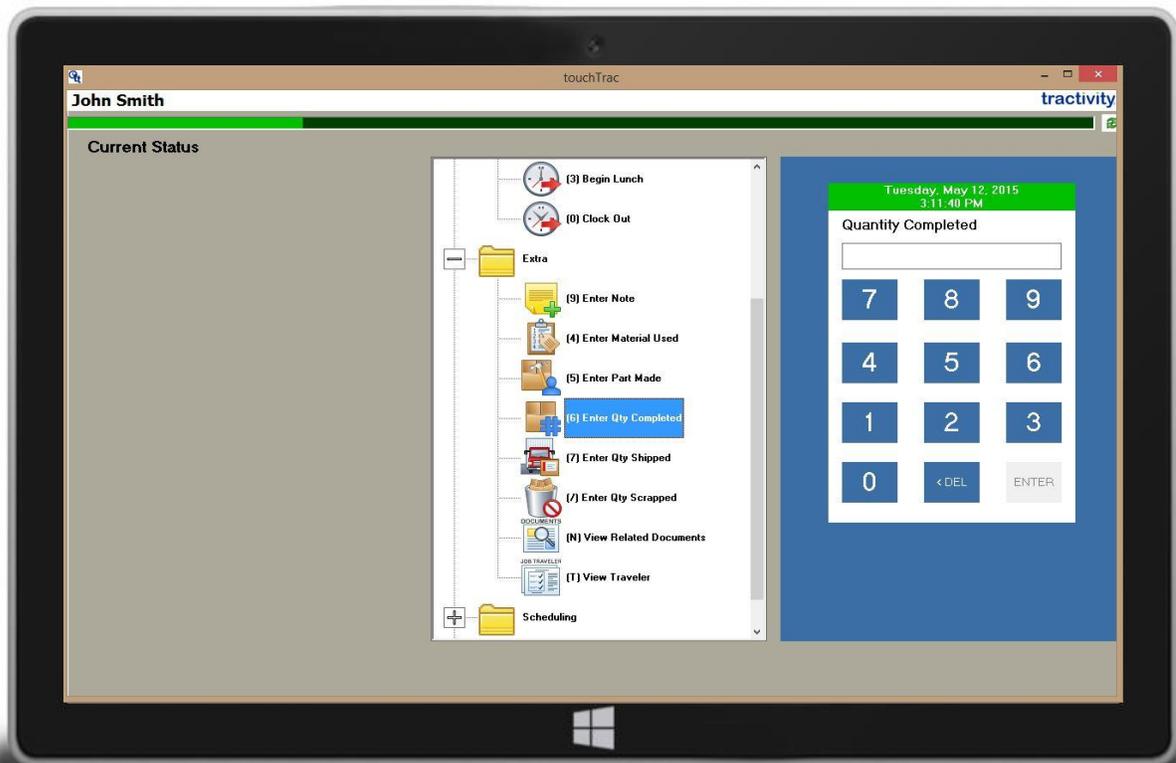
Estimated Time to Complete (ETC)

Enter the Estimated Time to Complete (in hours) for the current Job. Select Confirm. ETC entries appear on the History Log and are associated with current Job and Activity. Typical use would be for the employee to enter 0 hours remaining when they have completed the Activity.



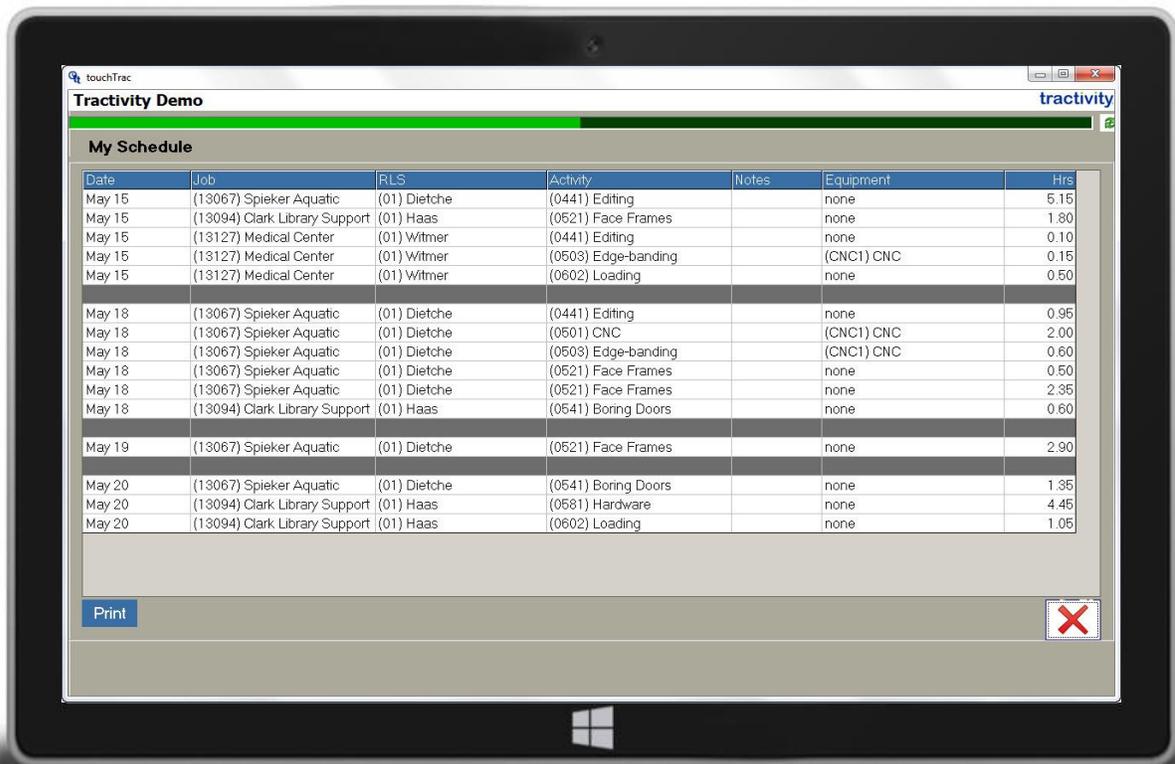
Quantity Completed

Enter the quantity completed for your current Job, then select Enter. Quantity entries appear on the History Log and are associated with current Job and Activity.



Employee Schedule

Enter employee ID to login. Select My Schedule or menu shortcut (S). Employees may clock into a Job listed on the Employee Schedule by selecting the job line. NOTE: The Employee Schedule requires the TracManager Scheduling Module.



The screenshot displays the 'Tractivity Demo' application window. The main content area is titled 'My Schedule' and contains a table with the following columns: Date, Job, RLS, Activity, Notes, Equipment, and Hrs. The table lists various work activities for dates from May 15 to May 20. At the bottom of the window, there is a 'Print' button and a red 'X' icon.

Date	Job	RLS	Activity	Notes	Equipment	Hrs
May 15	(13067) Spieker Aquatic	(01) Dietche	(0441) Editing		none	5.15
May 15	(13094) Clark Library Support	(01) Haas	(0521) Face Frames		none	1.80
May 15	(13127) Medical Center	(01) Witmer	(0441) Editing		none	0.10
May 15	(13127) Medical Center	(01) Witmer	(0503) Edge-banding		(CNC1) CNC	0.15
May 15	(13127) Medical Center	(01) Witmer	(0602) Loading		none	0.50
May 18	(13067) Spieker Aquatic	(01) Dietche	(0441) Editing		none	0.95
May 18	(13067) Spieker Aquatic	(01) Dietche	(0501) CNC		(CNC1) CNC	2.00
May 18	(13067) Spieker Aquatic	(01) Dietche	(0503) Edge-banding		(CNC1) CNC	0.60
May 18	(13067) Spieker Aquatic	(01) Dietche	(0521) Face Frames		none	0.50
May 18	(13067) Spieker Aquatic	(01) Dietche	(0521) Face Frames		none	2.35
May 18	(13094) Clark Library Support	(01) Haas	(0541) Boring Doors		none	0.60
May 19	(13067) Spieker Aquatic	(01) Dietche	(0521) Face Frames		none	2.90
May 20	(13067) Spieker Aquatic	(01) Dietche	(0541) Boring Doors		none	1.35
May 20	(13094) Clark Library Support	(01) Haas	(0581) Hardware		none	4.45
May 20	(13094) Clark Library Support	(01) Haas	(0602) Loading		none	1.05

Need More Help?

If you have questions about using touchTrac, please contact Customer Support:

E: support@tractivity.com

T: 888-540-7171