Tracker Manual

Contents

What is Tracker

Tracker tracks every minute detail on your facilities and projects. With it, you can follow your workflow, knowing “who does what” and which material is deployed to achieve which task.

The major modules are organised Menus in a left column with sub-menus leading to individual application scripts. The Menus are listed below.

Fig. 1 Tracker home Page

Contact module:

Create, edit and manage **Staff, Client** and **Vendor** Details.

User Module

Create, edit and manage Tracker **Users**

Location Map

Create, edit and manage the **facility location map**. In Facility, we can create multiple clients from the **Contact Module** sub-menu **Client Info**. Each client can have multiple **Location**s, which can have multiple **Areas**. An **Area** contains multiple **Properties** and **Infrastructure**, while each **property/infrastructures** can contain multiple **Items** of different specifications. We create, edit and manage each of these units of a facility.

Facility Operations

We can carry out a **PPM Service**, **Fault Repair**, **Maintenance** or **Installations** on the various units of a facility. The sub-menus under this Module lead to the script that accomplishes these. We record, edit, manage and query the record on these activities from the sub-menus scripts

Project/Jobs

A project is defined as a job with a minimum of one specified **Task** - assigned to a staff; or **contract** - assigned to a vendor. We create, edit, manage and query job records using the sub-menu scripts at this module.

Requisitions

Material requisitions to fill up stores are made from the sub-menus of this module. Materials are also released for the various tasks, PPM Service, Fault repairs, Installation and maintenance as requested by the field staff. Through the Sub-menus here, we create material requisitions for store replenishments, and record material requisition status.

Store.

We create, edit and manage the multiple stores and their material stock levels here. **Tracker** recognises store per client, per location or per Branch. The store sub-menu is built with composite functionality to achieve the multiple requests.

Materials

We define our material, their classification and their units for counting from the sub-menus of this module.

Management

The Management Module contains scripts for setting broad limits, generating reports, setting Clients SLA standards etc. The **Set limits** sub-menu allows the allocation of financial approval levels to the various levels of staff; whereas the **Reports** allows for the generation of reports on all work types.

Start and Log-on to Tracker

Using a suitable browser of your choice go to the web address and enter http://mis.fmxservicesng.com as shown below.

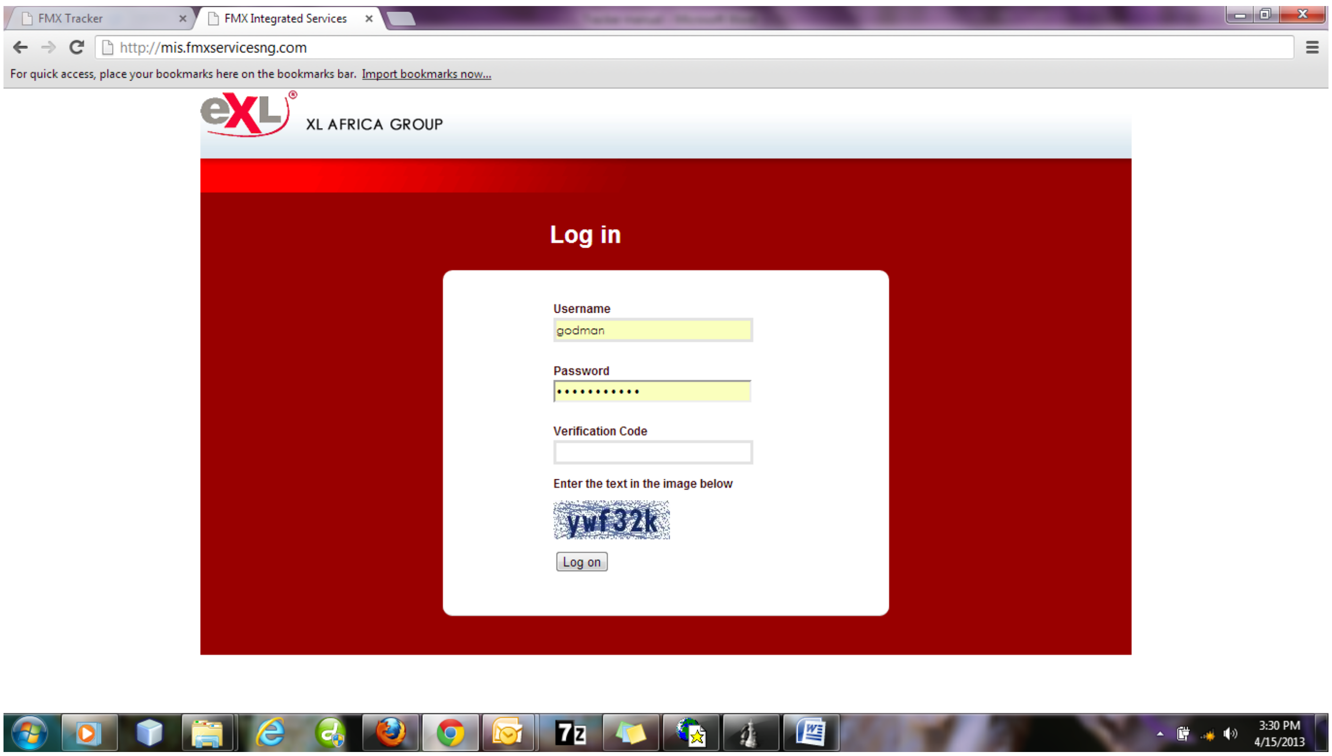

Fig. 2 Tracker Log in Page

- Enter your Tracker's address in the browser address bar to get the above **Log on** page displayed.
- Enter your **username**, the **password** and the **Verification** displayed to open the Menu of Tracker.
- On your first **Log on**, a password change screen will be displayed and your are required to change your default password given to you.

Locating individual sub-menu screen

- Locate the Module of interest.
- Click to open up the sub menus
- Click on the sub menu to open up the application page.

Contact Info

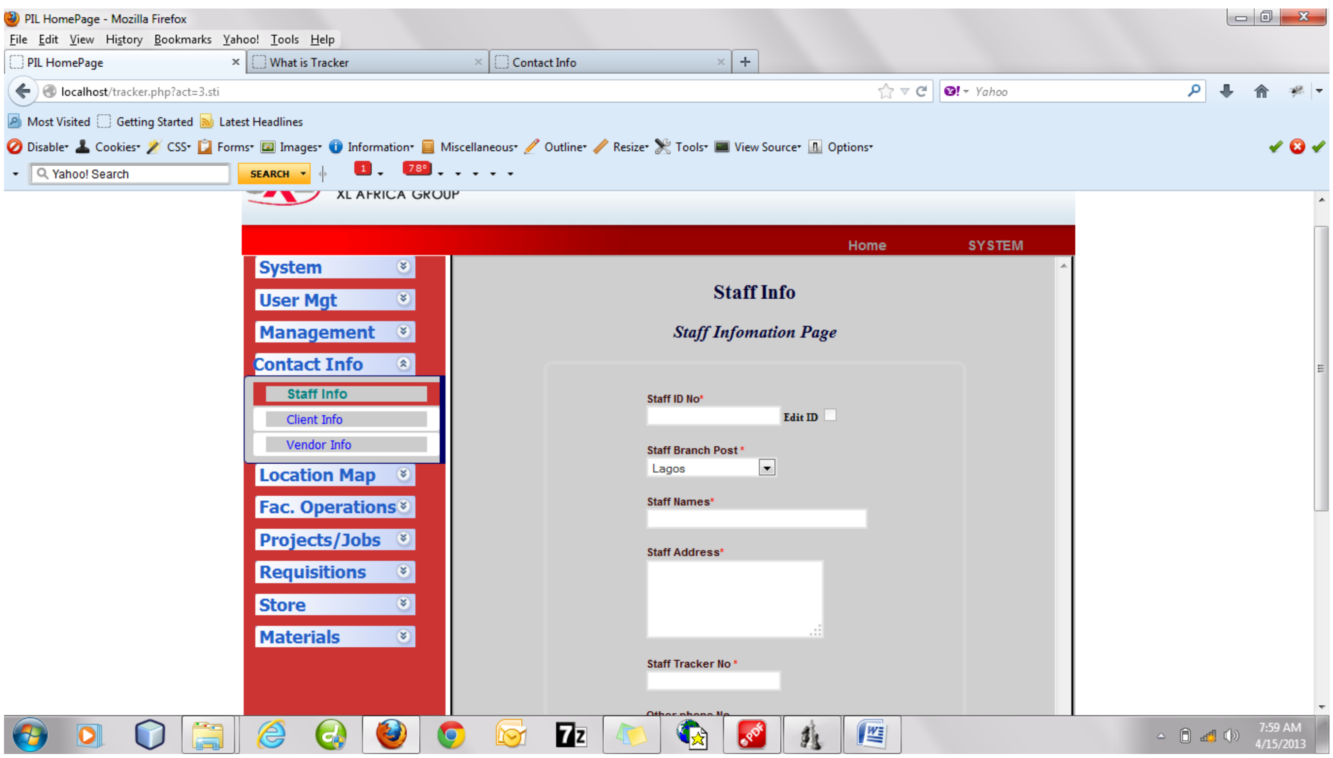

Fig. 3 Contact Info. (Staff Edit Page)

- **Staff Info**: Requirement**: Unique Staff ID No. – Alphanumeric**
  - Clicking on the **Staff Info** sub menu of the Contact Info Menu opens the **Staff Information Page**
  - **Create:**
    - Fill in the forms requirements ensuring every compulsory field is filled.
    - Click Save Staff details Button to save record
  - **Edit:**
    - E**nter the Unique** **Staff ID No** and click anywhere on the form**.**
    - Allow Tracker to automatically load the staff details and then edit the required field
    - Click Save Staff Details Button to update record.
  - **Delete:**
    - Enter the Unique **Staff ID No** and click anywhere on the form.
    - Allow Tracker to automatically load the staff details.
    - Click Delete Button and Tracker will remove Staff detail from Database.
  - **Edit Unique ID No.**
    - Load the Staff detail as stated in the **Edit**
    - Check the Edit ID field to enable the **Staff ID No** for Edit.
    - Edit and enter the new unique ID Card No.
    - Allow Tracker to automatically load the staff details.
    - Click Save Staff Details Button to update record.

Note: Tracker alerts you when there is a conflict with an already existing Staff ID.

- **Client Info**: Requirement**: Unique Client Mnemonic – Alphanumeric**
  - Clicking on the **Client Info** sub menu of the Contact Info Menu opens the **Client Information Page**
  - **Create:**
    - Fill in the forms requirements ensuring every compulsory field is filled.
    - Click Save Client details Button to save record.
  - **Edit:**
    - Enter the Unique **Client Short Name** and click anywhere on the form**.**
    - Allow Tracker to automatically load the client details and then edit the required field

  - Click Save Client Details Button to update record.
- **Delete:**
  - Enter the Unique **Client Short Name** and click anywhere on the form.
  - Allow Tracker to automatically load the client details.
  - Click Delete Button and Tracker will remove client detail from Database
- **Edit Unique Client Short Name.**
  - Load the Client detail as stated in the **Edit**
  - Check the Edit ID field to enable the **Client Short Name** for Edit.
  - Edit and enter the new unique ID Card No. and click outside the field, allowing Tracker to verify ID Card No.
    - Tracker alerts you when there is a conflict with an already existing Client Short Name
  - Allow Tracker to automatically load the client details.
  - Click Save Client Details Button to update record**.**

Vendor Info: Requirement**: Unique Vendor Mnemonic – Alphanumeric**

- Clicking on the **Vendor Info** sub menu of the Contact Info Menu opens the **Vendor Information Page**
- **Create:**
  - Fill in the forms requirements ensuring every compulsory field is filled**.**
  - Click Save Vendor details Button to save record
- **Edit:**
  - Enter the Unique **Vendor's Short Name** and click anywhere on the form**.**
  - Allow Tracker to automatically load the vendor details and then edit the required field
  - Click Save Vendor Details Button to update record.
- **Delete:**
  - Enter the Unique **Vendor's Short Name** and click anywhere on the form.
  - Allow Tracker to automatically load the vendor details.
  - Click Delete Button and Tracker will remove vendor detail from Database
- **Edit Unique Vendor Short Name.**
  - Load the Vendor detail as stated in the **Edit**
  - Check the Edit ID field to enable the **Vendor's Short Name** for Edit.
  - Edit and enter the new unique Vendor Short Name.
    - Allow Tracker to automatically verify the Short name.

    - Tracker alerts you when there is a conflict with an already existing Vendor Short Name.
- Click Save vendor Details Button to update record.

User Management

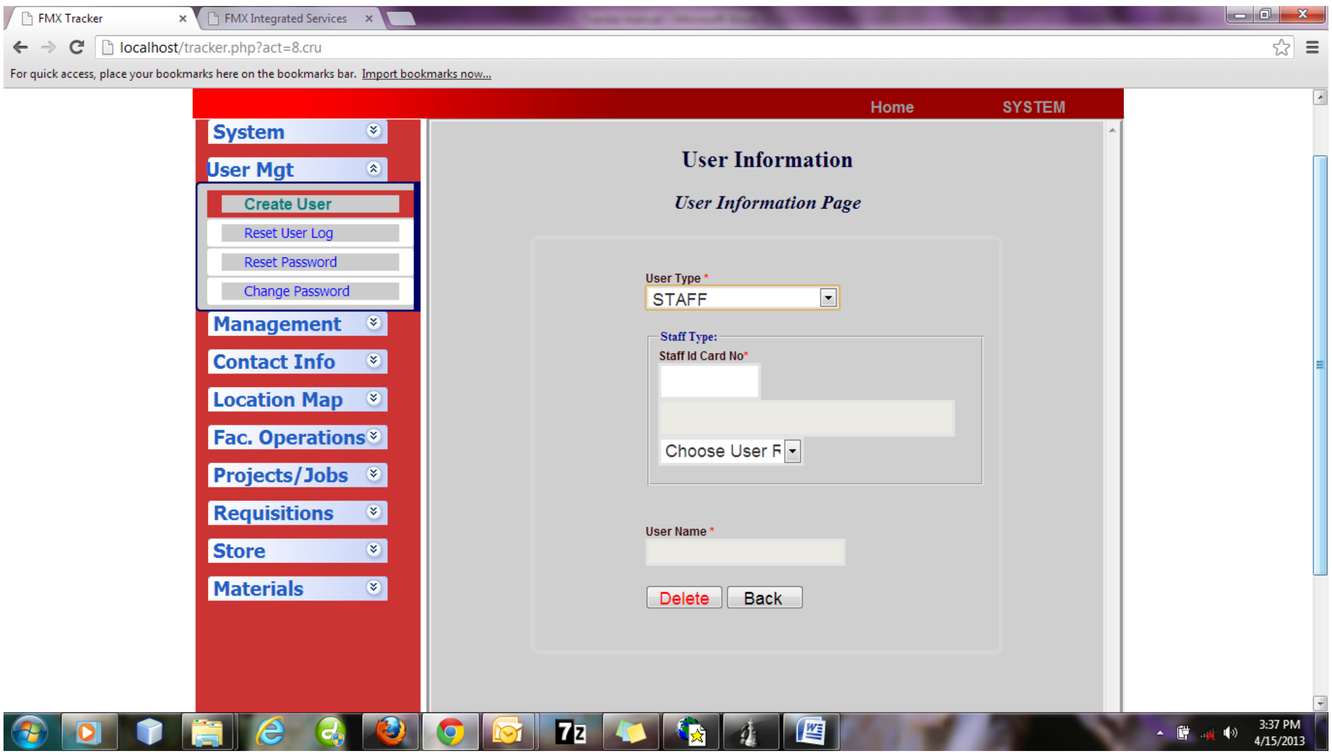

Fig. 4 User Information (User Edit Page)

- **Create user**: Requirement: **Contact Info** member (ID or Mnemonic)
    - Clicking on the **Create User** sub menu of the Contact Info Menu opens the **User Information Page**
    - **Select User type:**
        - Chose the **User Type** [staff, vendor, client] you want to create and Tracker will load the corresponding form.
    - **Creating Staff user:**
        - Enter the Unique **Staff ID No** and click anywhere on the form.
        - Wait while Tracker loads the staff details
        - Choose the User Right.
        - Enter an un-existing Username (Tracker will verify this for you)
        - Click Save User Details Button to save record. Tracker will create user with a default password.
    - **Creating Client user:**
        - Enter the Unique **Client Short name** and click anywhere on the form.
        - Wait while Tracker loads the Client details.
        - Enter an un-existing Username (Tracker will verify this for you)
        - Click Save User Details Button to save record. Tracker will create a client user with a default password.
    - **Creating vendor user:**
        - Enter the Unique **Vendor Short name** and click anywhere on the form.
        - Wait while Tracker loads the Vendor details.
        - Enter an un-existing Username (Tracker will verify this for you)
        - Click Save User Details Button to save record. Tracker will create a vendor user with a default password.

- **Reset User Log**: Requirement: **Unique User Name – Alphanumeric**
    - Clicking on the **Reset User Log** sub menu of the Contact Info Menu opens the **Reset User Log**
    - Enter the Unique **User Name** and click anywhere on the form.
    - Click Reset User Button to reset user log.

- **Reset Password**:Requirement: **Unique User Name – Alphanumeric**
    - Clicking on the **Reset Password** sub menu of the Contact Info Menu opens the **Reset Password Page**
    - Enter the Unique **User Name** and click anywhere on the form.
    - Click Reset Password Button to reset password to default.

- **Change Password**: Requirement: **None**
  - Clicking on the **Change Password** sub menu of the Contact Info Menu opens the **Change Password**
  - Enter the old password, the new password and a confirmation of the new password on the fields provided.
  - Click Change Password Button to change to new password

Location Map

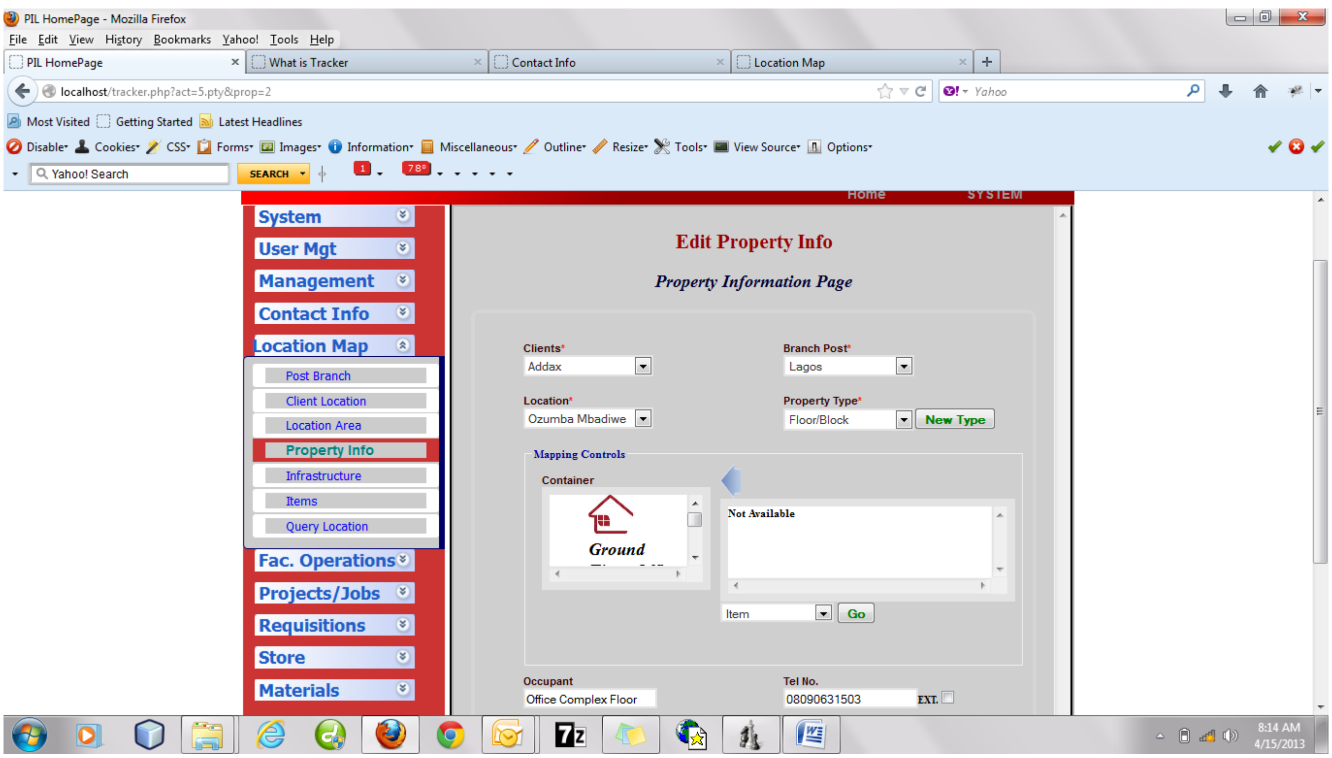

Fig 5. Location Map (property Edit Page)

- Post Branch: Requirement: **Unique Branch Name**
  - Clicking on the **Post Branch** sub menu of the Location Map Menu opens the **Branch Post Page**
  - The page automatically loads the page of the current user.
  - **Create New post:**
    - Check the **New Post** checkbox beside the **Post Branch Name** field to enable the field receive new post name.
    - Enter the New Post/Branch Name.
    - Check the **Edit** checkbox beside the **Post Manager** field and select a staff from the displayed options.
    - Enter the post address and click Save details Button **to save record**
  - **Edit:**
    - Select the Branch option from the displayed options at the **Post Branch Name.**
    - Check the **Edit** checkbox beside the **Post Manager** field and select a staff from the displayed options to change Branch manager.
    - Edit the post address and click Save Details Button **to save record.**

- Client Location: Requirmt**: Unique Location Name per client – Alphanumeric**
  - Clicking on the **Client Location** sub menu of the Location Map Menu opens the **Client Location Page**
  - **Create New Location**
    - Select the Post/Branch and the Client from the options displayed on **Post** and **Client Name** respectively.
    - Enter the New location Short Name. If already existing name, Tracker loads the detail. Tracker also loads the part of the clients' details for the new location.
    - Fill and edit other details.
    - Click Save Detail to save record.
  - **Edit Location**
    - Enter the New location Short Name and click anywhere on the Page.
    - Tracker will load the old details to be edited.
    - Edit the field you want to change.
    - Click Save Detail to save record.

Location Area: Requirement**: Unique Area Name per Location – Alphanumeric**

- Clicking on the **Location Area** sub menu of the Location Map Menu opens the **Location Area Page**
- **Create New Area**
  - Select the Post/Branch, Client, and Location from the options displayed on **Post** ,**Clients** and **Location** respectively.
  - Enter the New Area Name. If already existing name, Tracker loads the browser detail.
  - Click Save Detail to the name and create the area.
- **Edit Area**
  - Enter the Area Name and click anywhere on the Page.
  - Tracker will load the old details.
  - Check the **Edit** field and the **New Area Name** field will open for edit.
  - Click Save Detail to save record.

Property Info: Requirement**: Known property type.**

- Clicking on the **Property Info** sub menu of the Location Map Menu opens the **Property Info Page**
- **Create Property:**
  - Select the Post/Branch, Client, Location and Property type from the options displayed on **Post** ,**Clients, Location** and **Property Type** respectively. To create a new property-type, click the **New Type** button beside the **Property Type** field.
  - Use the Browser to navigate to the Area you intend to locate the property
  - Enter other property details in the fields provided.
  - Click Save details Button **to save** property.
- **Edit:**
  - Click on the property from the browser and tracker loads the property details
  - Edit the required fields.
  - Save details Button **to save record.**

- Infrastructure: Requirement: **Known Infrastructure type**
  - Clicking on the **Infrastructure** sub menu of the Location Map Menu opens the **Infrastructure Info Page**
  - **Create Property:**
    - **Select the Post/Branch, Client, Location and Infrastructure type from the options displayed on** **Post**, **Clients,** **Location** **and** **Infrastructure Type** respectively. To create a new Infrastructure type, click the New Type button beside the **Infrastructure Type** field.
    - Use the Browser to navigate to the Area you intend to locate the Infrastructure
    - Enter other Infrastructure details in the fields provided.
    - Click Save details Button **to save** Infrastructure.
  - **Edit:**
    - Click on the Infrastructure from the browser and tracker loads the Infrastructure details
    - Edit the required fields.
    - Save details Button **to save record.**

- Items: Requirement: **Unique Label name**
  - Clicking on the **Items** sub menu of the Location Map Menu opens the **Item Info Page**
  - **Create Item:**
    - Use the Browser to navigate to the Property/Infrastructure that contains the item
    - Select the Item group, Item material group and the Item name of the Item you want to create. Click the new buttons beside fields to create an un-existing option.
    - Enter other details in the fields provided.
    - Click Save details Button **to save** Item.
  - **Edit:**
    - Click on the Item from the browser and tracker loads the Item details
    - Edit the required fields.
    - Save details Button **to save record.**

Note. To load and edit details of the area, property, infrastructure and Item units of facility hold the mouse over the unit for 5 secs and Tracker will open up underlying units.

- **Query Location**: Requirement: **Unique Label name**
  - Clicking on the **Query Location** sub menu of the **Location Map Menu** opens the **Query location Page**
  - Choose the Location asset type of interest from the **Location Type** select options
  - Check the appropriate query criteria and fill in the details properly.
  - Click **Send Query** button and wait for Tracker to display the query Result.

Facility Operations

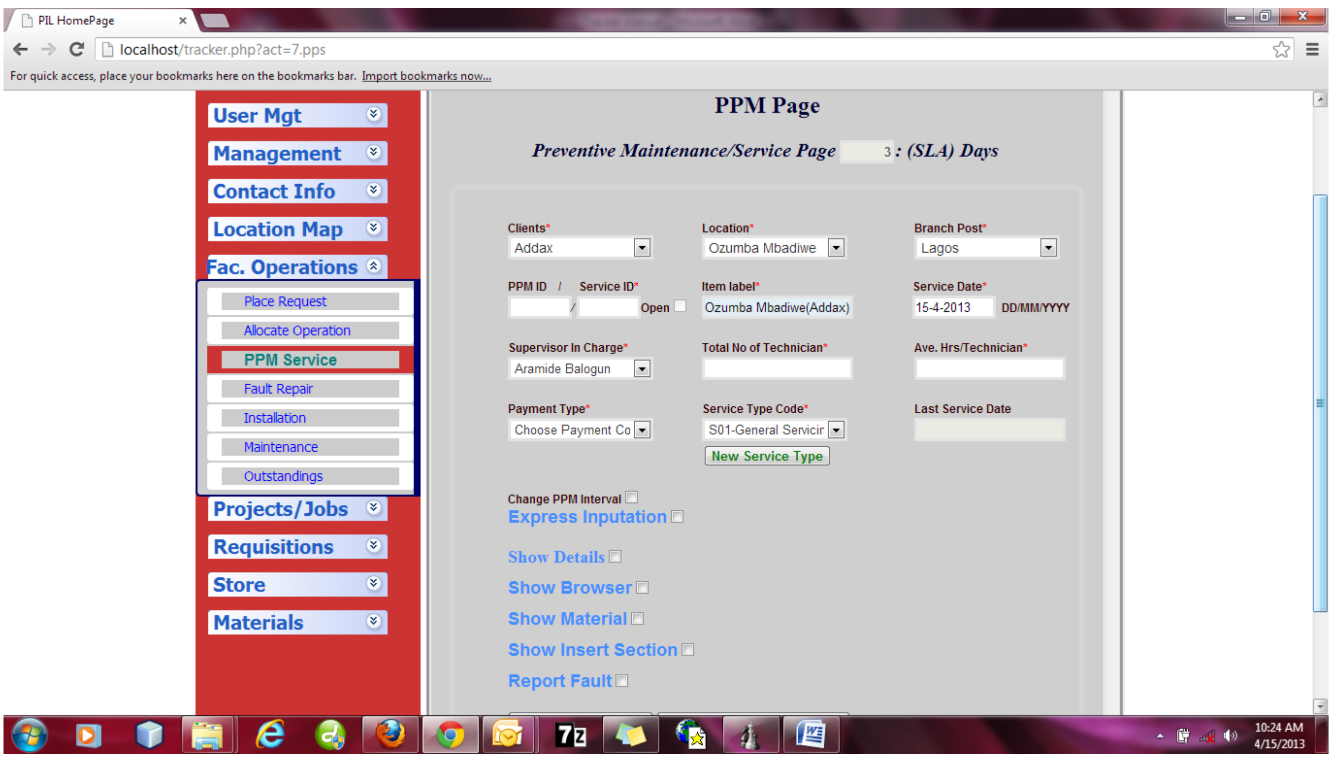

Fig. 6 Facility Operation (PPM Service Page)

- **Place Request**: Requirement: **None**
  - Clicking on the **Place Request** sub menu of the Fac. Operations Menu opens the **Service Request Page**
  - Select unit of interest using the Post/Branch, Client and Location from the options displayed on **Post**, **Client** and **Location** fields respectively; and/or by navigating using the browser.

- Select the service type from the **Request Description** options, enter details in the provided area and click the save details to post request.

- **Assign Operation**: Requirement: **Unique PPM ID – Numeric**
  - Clicking on the **Allocate Operation** sub menu of the Fac. Operations Menu opens the **Assign Operations Page**.
  - Enter the PPM ID to the **PPM ID** field and click anywhere for Tracker to load the details.
  - Select a staff to handle to requested service from the option in **Supervisor In Charge**
  - Fill other fields and click Assign Operation to allocate operation to the selected staff.

- **PPM Service**: Requirement: **Unique PPM ID / Service ID – Numeric**
  - Clicking on the **PPM Service** sub menu of the Fac. Operations Menu opens the **PPM Service Page**.
  - Enter the PPM ID or Service ID to the **PPM ID** or **Service ID** field and click anywhere for Tracker to load the details.
  - Fill missing details on the spaces provided.
    - If Service Type option is unavailable, click on the **Service Type Code** (Type-ID) button to create a corresponding Service Type as specified in SLA.
  - **Attach Material item** by checking the **Show Insert Section** checkbox.
  - Fill in details by checking **Show Details** checkbox.
  - **Locate Item** by checking the **Show Browser** checkbox.
  - **View material** details by checking **Show Materials** checkbox.
  - Report accompanying fault by checking the **Report Fault** checkbox.
  - Save the record by clicking the Save Details Button.

- **Fault Repair**: Requirement: **Unique PPM ID / Service ID – Numeric**
  - Clicking on the **Fault Repair** sub menu of the Fac. Operations Menu opens the **Fault Repair Page**.
  - Enter the PPM ID or Fault ID to the **PPM ID** or **Fault ID** field and click anywhere for Tracker to load the details.
  - Fill missing details on the spaces provided.

    - If Fault Code option is unavailable, click on the **New Fault Type** (Type-ID) button to create a corresponding Fault Code Type as specified in SLA.
  - **Attach Material item** by checking the **Show Insert Section** checkbox.
  - Fill in details by checking **Show Details** checkbox.
  - **Locate Item** by checking the **Show Browser** checkbox.
  - **View material** details by checking **Show Materials** checkbox.
  - Save the record by clicking the Save Details Button.

- Installation: Requirement: **Unique Installation ID – Numeric**

  - Clicking on the **Installation** sub menu of the Fac. Operations Menu opens the **Installation Page**.
  - Enter the Installation ID to the **Installation ID** field and click anywhere for Tracker to load the details.
  - Fill missing details on the spaces provided.
    - If Installation Type option is unavailable, click on the **New Installation Type** (Type-ID) button to create a corresponding Installation Type as specified in SLA.
  - **Attach Material item** by checking the **Show Insert Section** checkbox.
  - Fill in details by checking **Show Details** checkbox.
  - **Locate Item** by checking the **Show Browser** checkbox.
  - **View material** details by checking **Show Materials** checkbox.
  - Save the record by clicking the Save Details Button.

- Maintenance: Requirement: **Unique PPM ID / Service ID – Numeric**

  - Clicking on the **Maintenance** sub menu of the Fac. Operations Menu opens the **Maintenance Page**.
  - Enter the PPM ID or Maintenance ID to the **PPM ID** or **Maintenance ID** field and click anywhere for Tracker to load the details.
  - Fill missing details on the spaces provided.
    - If Maintenance Type option is unavailable, click on the **New Type** (Type-ID) button to create a corresponding Maintenance Type as specified in SLA.
  - **Attach Material item** by checking the **Show Insert Section** checkbox.
  - Fill in details by checking **Show Details** checkbox.
  - **Locate Item** by checking the **Show Browser** checkbox.
  - **View material** details by checking **Show Materials** checkbox.
  - Save the record by clicking the Save Details Button.

- **Outstandings**: Requirement**: Unique Location Name per client – Alphanumeric**
  - Clicking on the **Outstandings** sub menu of the Location Map Menu opens the **View Pending Page**
  - Select unit of interest using the Post/Branch, Client and Location from the options displayed on **Post**, **Client** and **Location** fields respectively; and/or by navigating using the browser.
  - Select the query task Type from the **Task Type** options.
  - Select the operations status from the **Status** options.
  - Click Query pendings button and wait for Tracker to display the results.

Project / Job

Fig. 5 Project/Job (Job Manager Page)

- **Job Request**: Requirement: **None**
  - Clicking on the **Job Request** sub menu of the Projects/Jobs Menu opens the **Job Request Page**
  - Tracker will restrict user to his Post only.
  - Select the client from the options displayed on **Client**, choose the Job classification type and enter any other details.
  - If Job is property maintenance, Tracker will display a browser to be used to locate the property/infrastructure.
  - Click the save details to post request.

- **Job Post**: Requirement: **Unique Job ID or Temp ID – Numeric**
  - Clicking on the **Job Post** sub menu of the Projects/Jobs Menu opens the **Job Post Page**.
  - Enter the Temp ID or Job ID to the **Temp ID** or **Job ID** field and click anywhere for Tracker to load the details.
  - Fill other fields as required
  - Click Save Details to save record.

- **Job Manager**: Requirement: **Unique Job ID – Numeric**
  - Clicking on the **Job Manager** sub menu of the Projects/Jobs Menu opens the **Job Manager Page**.
  - Enter the Job ID to the **Job ID** field and click anywhere for Tracker to load the details.
  - Fill missing details on the spaces provided.
  - Lines of accomplished levels will be displayed.
  - Click on each button to record or edit operations.
  - Save the record by clicking the Save Details Button.

- **Job Schedule**: Requirement: **Unique Job ID – Numeric**
  - Clicking on the **Job Schedule** sub menu of the Projects/Jobs Menu opens the **Job Schedule Page**.
  - Enter the Job ID to the **Job ID** field and click anywhere for Tracker to load the details.
  - Tracker displays present Job stage or reverts to the required page if necessary.

- Using the options displayed at **Job stage** field, select the present job stage and fill in required filed from the spaces displayed by Tracker.
- Save the record by clicking the Save Details Button.

Scope Job

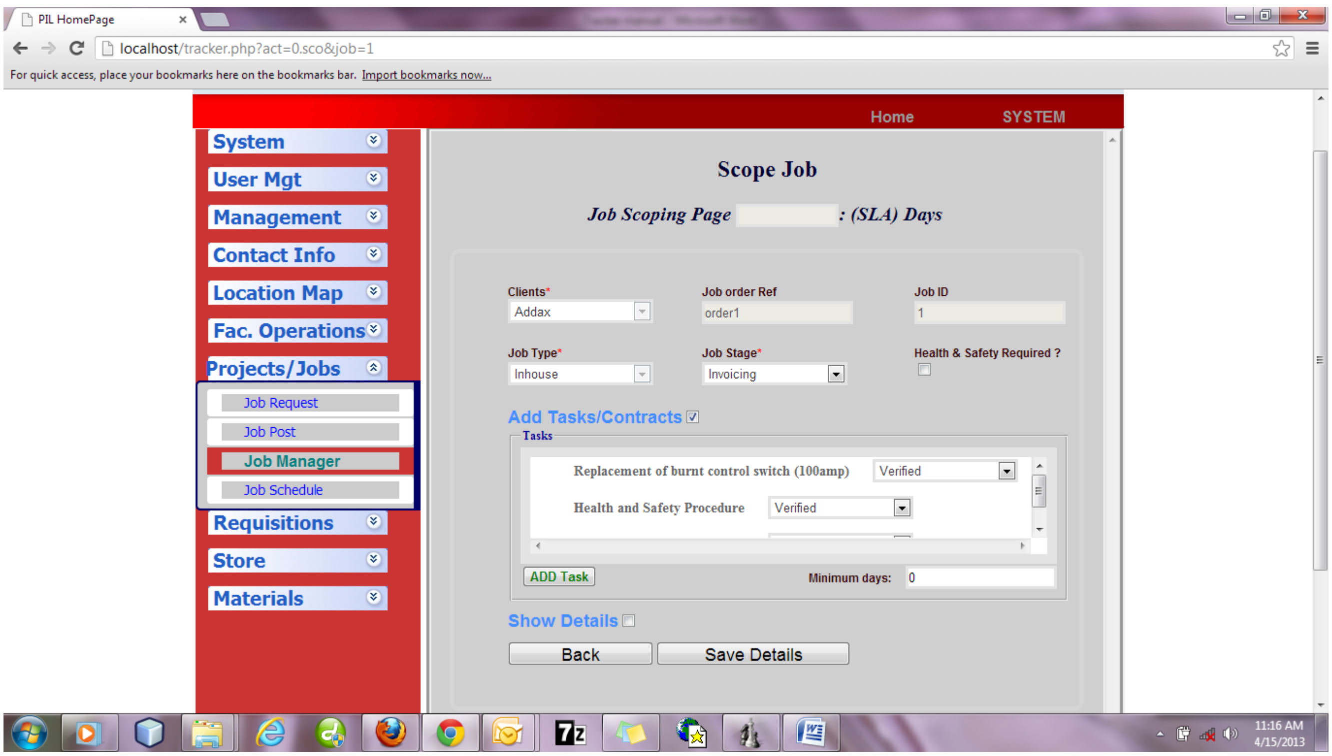

Fig. 8 Scoping page

- The Job Scoping page can be displayed from the Job Manager page (fig 5.).
- Display the Job details from the Job Manager sub menu of the Projects/Jobs Menu.
- Click on "**Job Scoped by ..**" or "**Scope Job**" line among the lined-up buttons at the bottom of the page to open the Job Scoping page.

- **Job Scope**: Requirement: **Linked from Job Manager**
    - To add Tasks or Contracts to the Job, check the **Add Tasks/Contracts** checkbox and tracker will open a frame to add Task, Contracts or Both depending on the Job Type options.
    - Check the **Show Details** checkbox to enter scope details.
    - Clicking on the Add Task or Add Contract Button to add each.
    - Tracker will display the individual task/contract details as they are being attached on the section.
    - To edit of the attached tasks or contracts, click the link from the page.
    - Click the save details to post request.

Task

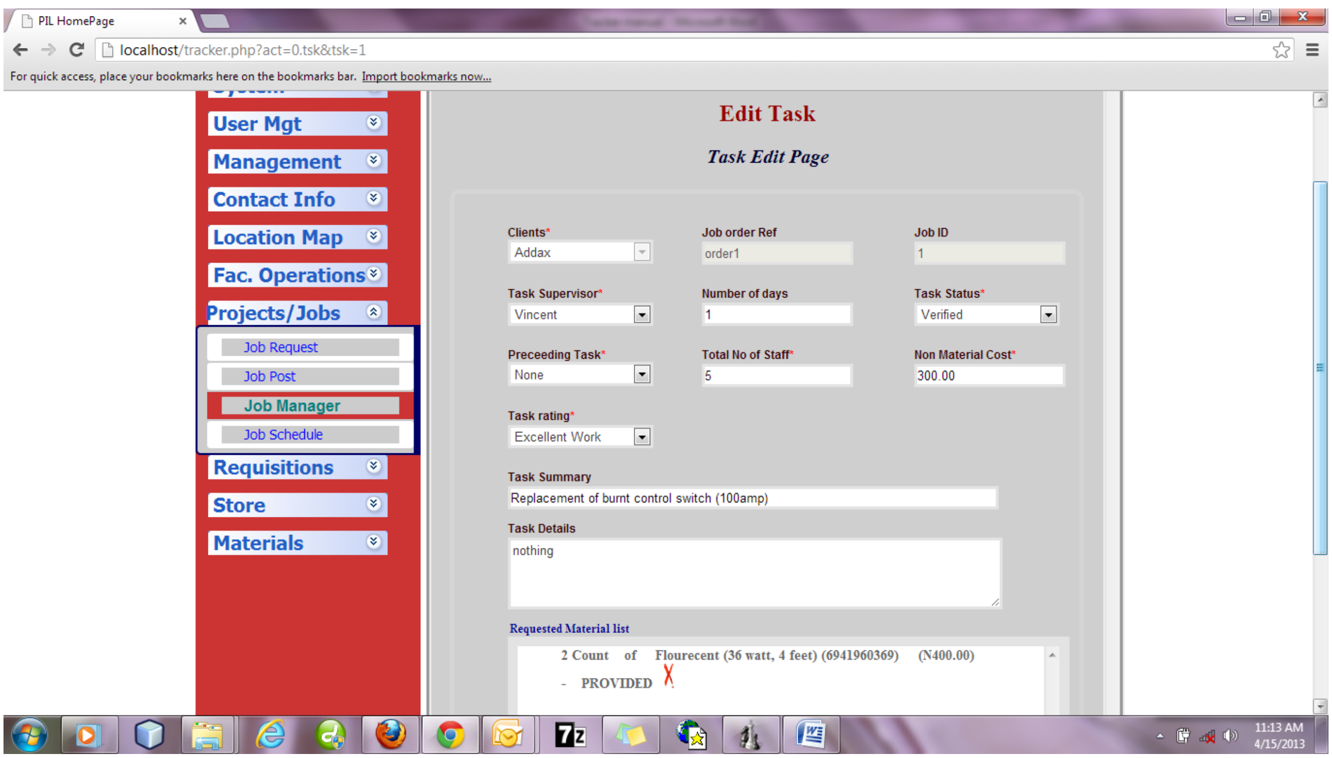

Fig. 9 Task Edit Page

- Click on the task link displayed on the Add Task/Contract Section of the Scoping Page (fig. 6)to display the particular task.
- Check the **Show Insert Section** checkbox on the Task Edit Page to Attach Materials to tasks.
- Edit other fields as required.
- Click on Save Details to save record.

Contract

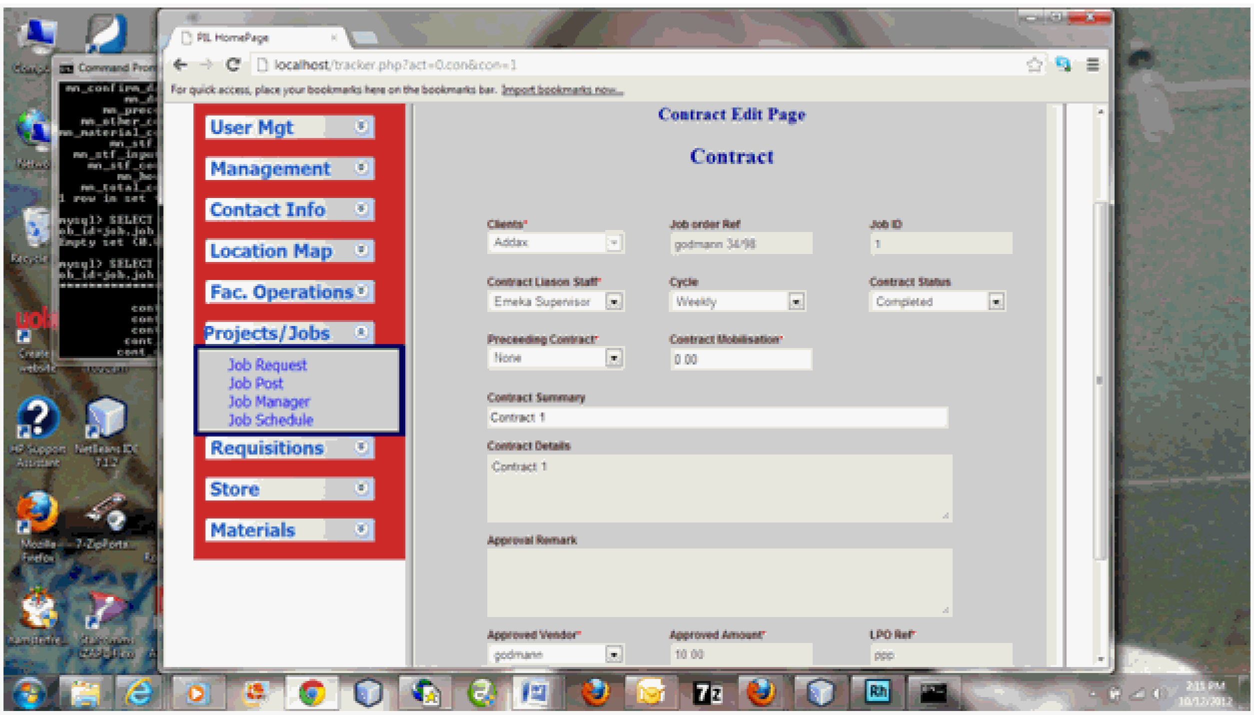

Fig. 10 Contract Edit Page

- Click on the Contract link displayed on the Add Task/Contract Section of the Scoping Page to display the particular Contract

- Check the **Show Vendors** checkbox to fill Vendor option and request approval for contract award.
- Edit other fields as required.
- Click Save Details to record.
- To view Contract and for approval, the mail requesting link will automatically open this same page with required fields.

Attach material/Item

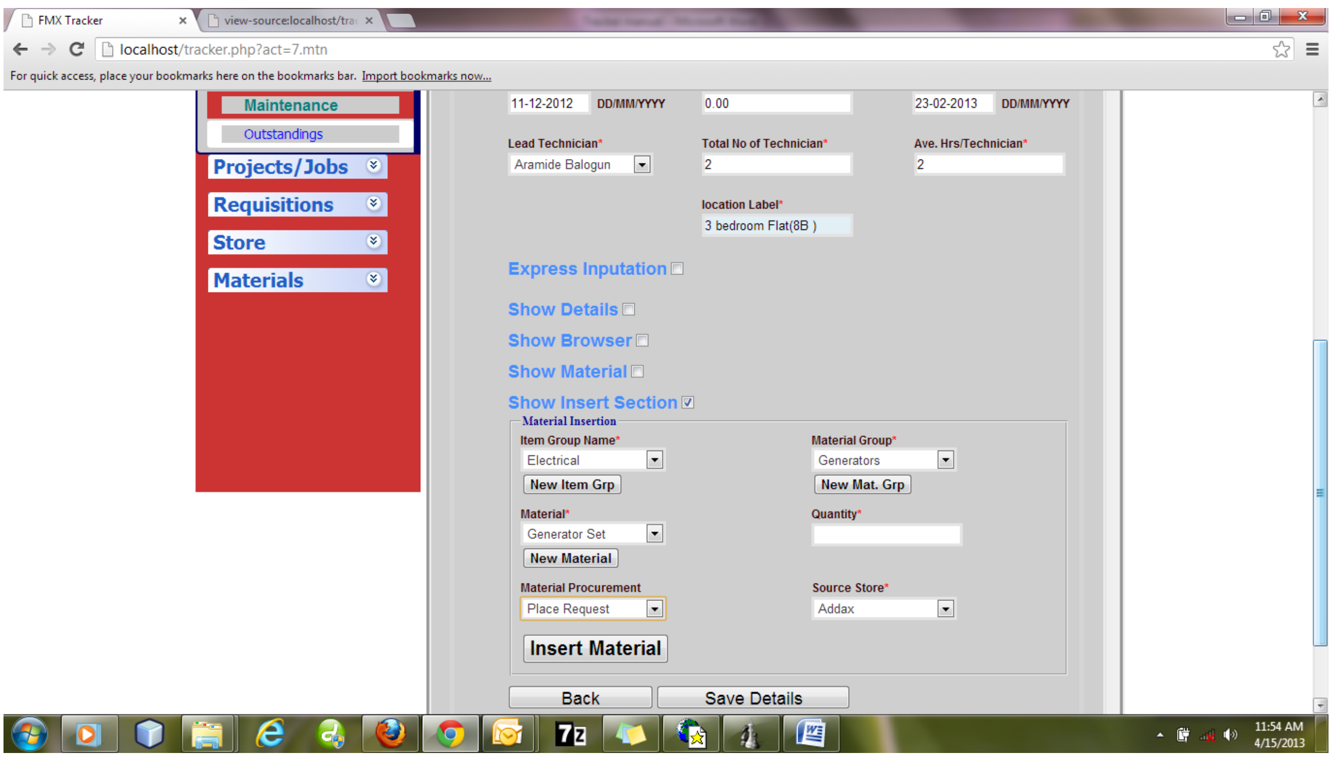

Fig. 11 Material Attachment Section

This action is required to allocate/request material (item) to operations (PPM Service, Fault Repair, Installation, Maintenance, Project task).

- Check the **Show Insert Section** checkbox in any of the operations page and the material insertion section will open.

- Select the material from the **Item Group Name**, **Material Group** and **Material** options. To add new option, click the underline New button.
- Fill the other fields.
- Fill in the material procurement options requirements.
- Click the Insert Material Button to attach the material the operation.
- Repeat for all required materials.

Requisition

Fig. 12 Material Requisition Page

- Store Replenishment Request: Requirement: **None**
  - Clicking on the **Request Materials** sub menu of Requisition Menu opens the **Material Requisition Page**.
  - Select **store** as the option on **Requisition Type** and Tracker displays list of applicable stores.

- Select the store to be replenished from the **Store** options.
- Check the **Show Insert Section** checkbox and Tracker will display the Material Insertion section.
- Using the options and fields displayed in the Material insertion section, insert every material in the present requisition.
- To view the list of material inserted, check the **Show Material** checkbox.
- Check the **Show Vendors** checkbox to enter the bidding vendor's details. After entering all the required 3 vendors, choose one by checking the corresponding radio button.
- Fill the **Selection/Release Justification** details.
- Click the save details to post requisition.

- Approving store Replenishment Request: Requirement**: Req. ID**

  - Clicking on the **Request Materials** sub menu of Requisition Menu opens the **Material Requisition Page**.
  - Enter the Req. ID in the **Requisition Id** field and Tracker will load the Requisition details.
  - **Cross-check the requisition as displayed.**
  - To view the list of material inserted, check the **Show Material** checkbox .
  - Check the **Show Vendors** checkbox to view the vendor bidding summary.
  - Click Approve to approve Requisition.

- Issuing approved Replenishment LPO: Requirement**:** **Req. ID**

  - Clicking on the **Request Materials** sub menu of Requisition Menu opens the **Material Requisition Page**.
  - Enter the Req. ID in the **Requisition Id** field and Tracker will load the Requisition details.
  - **Cross-check the requisition as displayed.**
  - To view the list of material inserted, check the **Show Material** checkbox.
  - Check the **Show Vendors** checkbox to view the vendor bidding summary.
  - Enter the LPO Reference on the **LPO Ref** field
  - Click Record LPO to save record.

- **Updating Material Request Status**:Requirement**: Oper. Type & ID**
    - Clicking on the **Request Materials** sub menu of Requisition Menu opens the **Material Requisition Page**.
    - Select **usage** as the option on **Requisition Type** and Tracker displays list of operations type as option under **Requisition Type.**
    - Select the operations type from the options on **Requisition Type** and Tracker will list all pending Material Requisitions for the Operations type with the names of the staff making the request.
    - Select the corresponding Requisition and Tracker will load the details.
    - Check **Show Store Details** checkbox (if not open) to open the store details
    - Fill as required.
    - Check **Show Material** checkbox to view the materials.
    - Click Save Details to save record.

LPO Payment

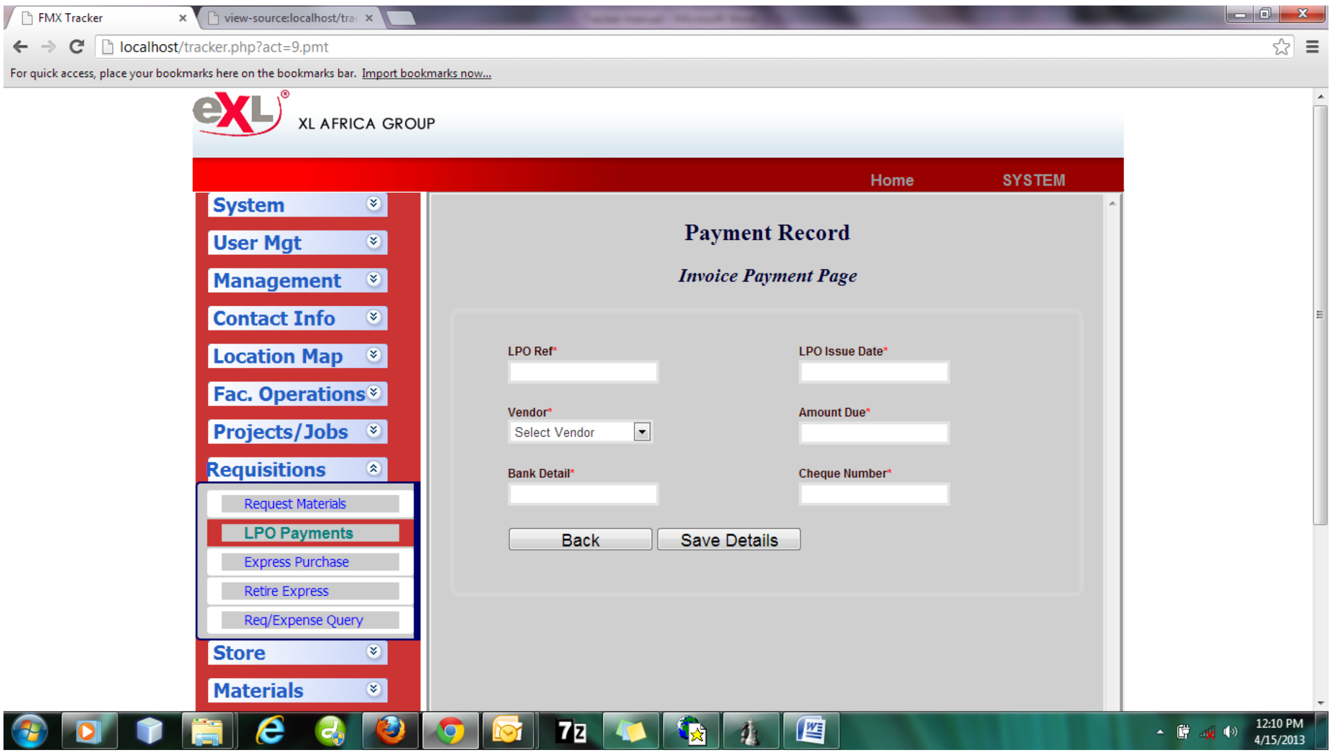

Fig. 13 LPO Payment Page

- **Make Lpo payment**: Requirement: **lpo ref**
    - Clicking on the **LPO Payments** sub menu of Requisition Menu opens the **Record Payment Page**
    - Enter the LPO reference on the **LPO Ref** field and click anywhere for Tracker to load the details
    - Fill the required fields (payment details) appropriately and Click the Save Details Button to save details.

Expense Request

Fig. 14 Expense Detail

- **Expense Request**: Requirement: **Existing Operation/Store/Others.**
  - Clicking on the **Express Purchase** sub menu of Requisition Menu opens the **Expense Details Page**.
  - Enter the Expense ID in the **Expense No** field, and click anywhere on the page for Tracker to load existing Expense details.
  - **OR**
    - Check the **Expense No * / Select** the checkbox.
    - Select the Operation type from the options shown on the **Operations Type** fields and select the Operation of interest from the options shown on the **Requisitor Detail** fields. Tracker loads your option on the **Requisitor Detail** options.
    - Select the appropriate option and wait for Tracker to load the Expense Details.

- Check the **Show Insert Section** checkbox and Tracker will display the Material Insertion section.
- Using the options and fields displayed in the Material insertion section, insert every material in the present expense requisition.
- To view the list of material inserted, check the **Show Material** checkbox.
- Check the **Show Details** checkbox to enter other related expense as **Other Expenses Amount.**
- Select the Staff Expense Initiator and the Approving staff.
- Fill the Expense Justification field.
- Click the Save Details Button to Request Expense.

- **Approving Expense Request**: Requirement: **Exp. ID**
    - Clicking on the **Express Purchase** sub menu of Requisition Menu opens the **Expense Details** Page.
    - Enter the Expense ID in the **Expense No** field and Tracker will load the Expense details.
    - **OR**
        - Check the **Expense No * / Select** the checkbox.
        - Select the Operation type from the options shown on the **Operations Type** fields and select the Operation of interest from the options shown on the **Requisitor Detail** fields. Tracker loads your option on the **Requisitor Detail** options.
        - Select the appropriate option and wait for Tracker to load the Expense Details.
    - **Cross-check the Expense details as displayed.**
    - To view the list of material inserted, check the **Show Material** checkbox.
    - Check the **Show Details** checkbox to view others.
    - Click Approve to approve Expense.

- **Paying approved Expense**: Requirement: **Exp. ID**
    - Clicking on the **Express Purchase** sub menu of Requisition Menu opens the **Expense Details** Page.
    - Enter the Expense ID in the **Expense No** field and Tracker will load the Expense details.
    - **OR**

  - Check the **Expense No * / Select** the checkbox.
  - Select the Operation type from the options shown on the **Operations Type** fields and select the Operation of interest from the options shown on the **Requisitor Detail** fields. Tracker loads your option on the **Requisitor Detail** options.
  - Select the appropriate option and wait for Tracker to load the Expense Details.
- **Enter the payment details as requested by page**
- Click Save Details Button to record Expense.

- **Retire Paid Expense**: Requirement: **Exp. ID**
  - Clicking on the **Retire Express** sub menu of Requisition Menu opens the **Expense Details** Page.
  - Enter the Expense ID in the **Expense No** field and Tracker will load the Expense details.
  - **OR**
    - Check the **Expense No * / Select** the checkbox.
    - Select the Operation type from the options shown on the **Operations Type** fields and select the Operation of interest from the options shown on the **Requisitor Detail** fields. Tracker loads your option on the **Requisitor Detail** options.
    - Select the appropriate option and wait for Tracker to load the Expense Details.
  - **Enter the Retirement details as requested by page**
  - Click Save Details Button to record Expense.

Query Requisition/Expense

Fig. 15 Req./Expense Query

- **Req/Expense Query**: Requirement: **none**
  - Clicking on the **Req/Expense Query** sub menu of Requisition Menu opens the **Requisition/Expense List Query** Page
  - Choose the Req. Exp type from the option on **Query Type** select options
  - Choose the processing stage from the option on **Processing Stage** select options.
  - Fill the **FROM (DD/MM/YYYY)** (From Date) and **TO (DD/MM/YYYY)** (to date).
  - Fill the amount relation and the Amount Value in the provided space.
  - Click on the **Send Query** Button and wait for Tracker to display the result.

Store

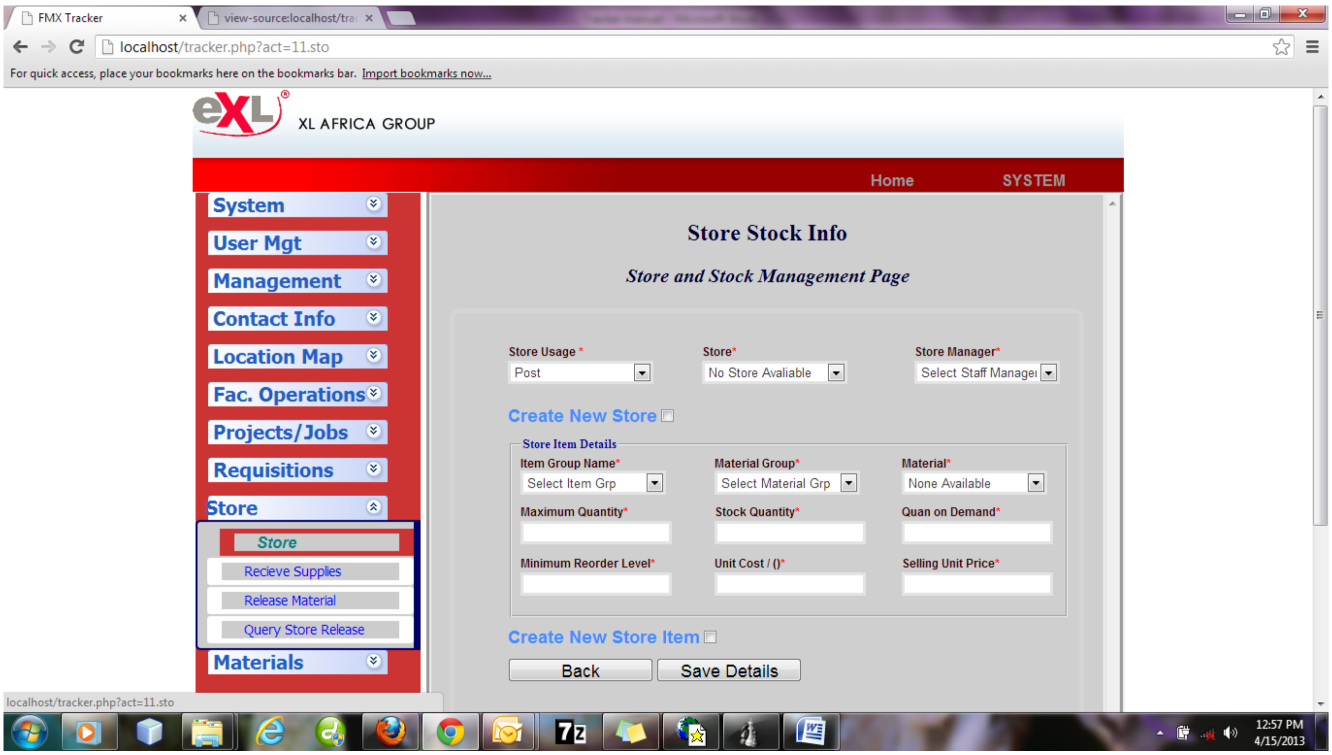

Fig. 16 Store

- **Create Store**: Requirement: **None**
  - Clicking on the **Store** sub menu of Store Menu opens the **Store Stock Info** Page
  - Select Store level [Branch, Client, location] from the options displayed on **Store Usage** field.
  - Check the **Create New Store** checkbox.
  - Select the store manager from the staff options displayed in the **Manager for New Store**.
  - Select the corresponding (Branch, Client or Location) where the store is domiciled
  - Click the Create Store Button to create new store.

- **Navigating and Editing Stores**: Requirement: **None**
  - Clicking on the **Store** sub menu of Store Menu opens the **Store Stock Info** Page
  - Select Store level [Branch, Client, location] from the options displayed on **Store Usage** field.
  - Select the Store from the options displayed in **Store** field.
  - Edit the store manager by changing the option in **Store Manager** field.
  - Click the Create Save Details to save.

- **Viewing and Editing store contents**: Requirement: **None**
  - Clicking on the **Store** sub menu of Store Menu opens the **Store Stock Info** Page
  - Navigate to the required store as shown above.
  - Select appropriate material item group from the option **Item Group Name** and **Material Group** fields of **View Store Content** subsection.
  - Use the New ... Buttons to create a group if not in option.
  - Select the material from the options in the **Material** fields.
  - Edit the **Stock Minimum** , **Stock Quantity** , **Quan on Demand** , **Stock Minimum** , **Unit Cost** , **Selling Unit Price** as required.
  - Save the record by clicking the Save Details Button.

- **Creating New material per store**: Requirement: **existing Store**
  - Clicking on the **Store** sub menu of Store Menu opens the **Store Stock Info** Page
  - Navigate to the required store as shown above.
  - Check the **Create New Store Item** checkbox to open the **Material Insertion** subsection.
  - Select appropriate material item group from the option **Item Group Name** and **Material Group** fields of **Material Insertion** subsection.
  - Select the material and enter its minimum in the **Minimum Stock** field.
  - Save the record by clicking the Save Details Button.

- **Viewing Store Stock levels**: Requirement: **existing Store**
  - Clicking on the **Store** sub menu of Store Menu opens the **Store Stock Info** Page
  - Select Store level [Branch, Client, location] from the options displayed on **Store Usage** field.
  - Select the Store from the options displayed in **Store** field.
  - Select appropriate material item group from the option **Item Group Name** and **Material Group** fields of **Store Item Details** subsection.
  - Tracker displays the stock details.

Receive Store Materials

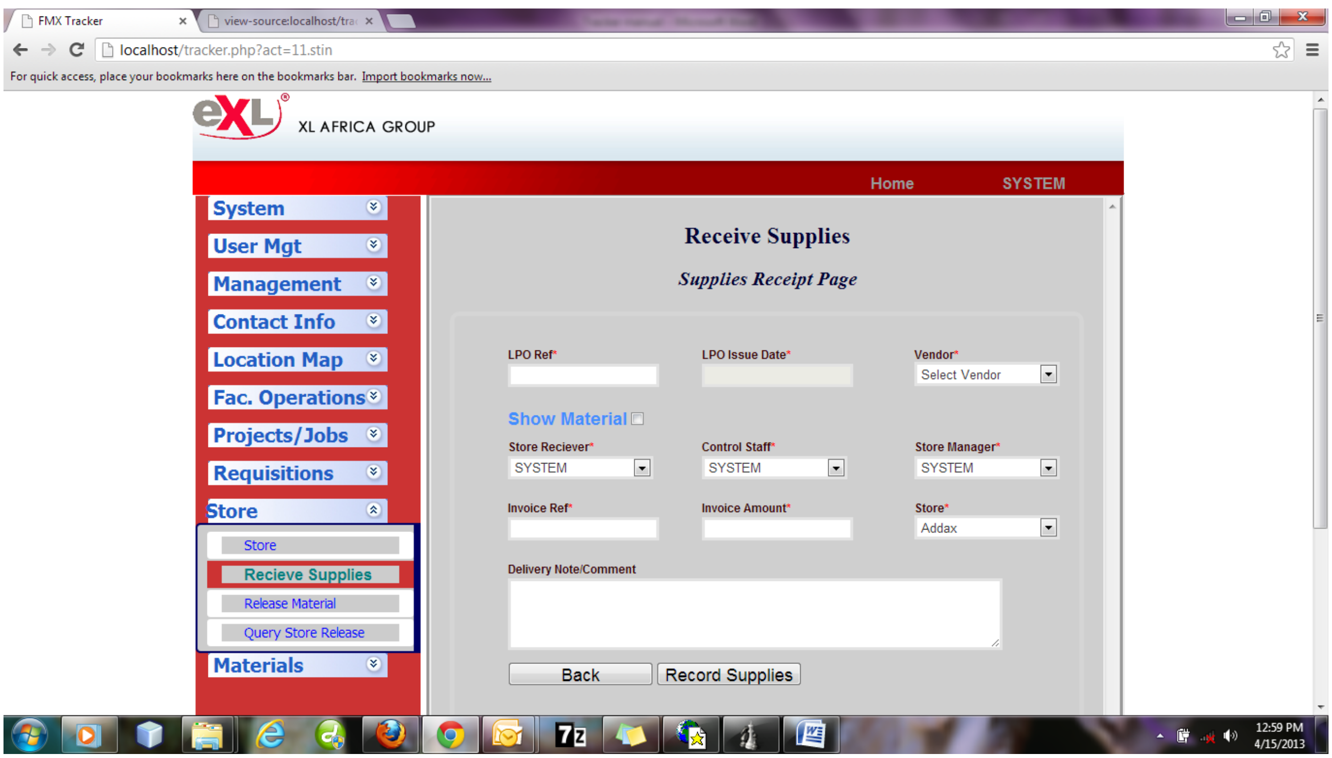

Fig. 17 Store (Receive Supplies)

- **Receive Store materials**: Requirement: **Existing store**
    - Clicking on the **Receive Supplies** sub menu of Store Menu opens the **Receive Supplies** Page
    - Enter the LPO reference on the **LPO Ref** field and click anywhere for Tracker to load the details
    - Check the **Show Material** checkbox to view the material order in the LPO.
    - Fill the required fields appropriately and Click the Record Supplies Button to save details.

Store Materials Release

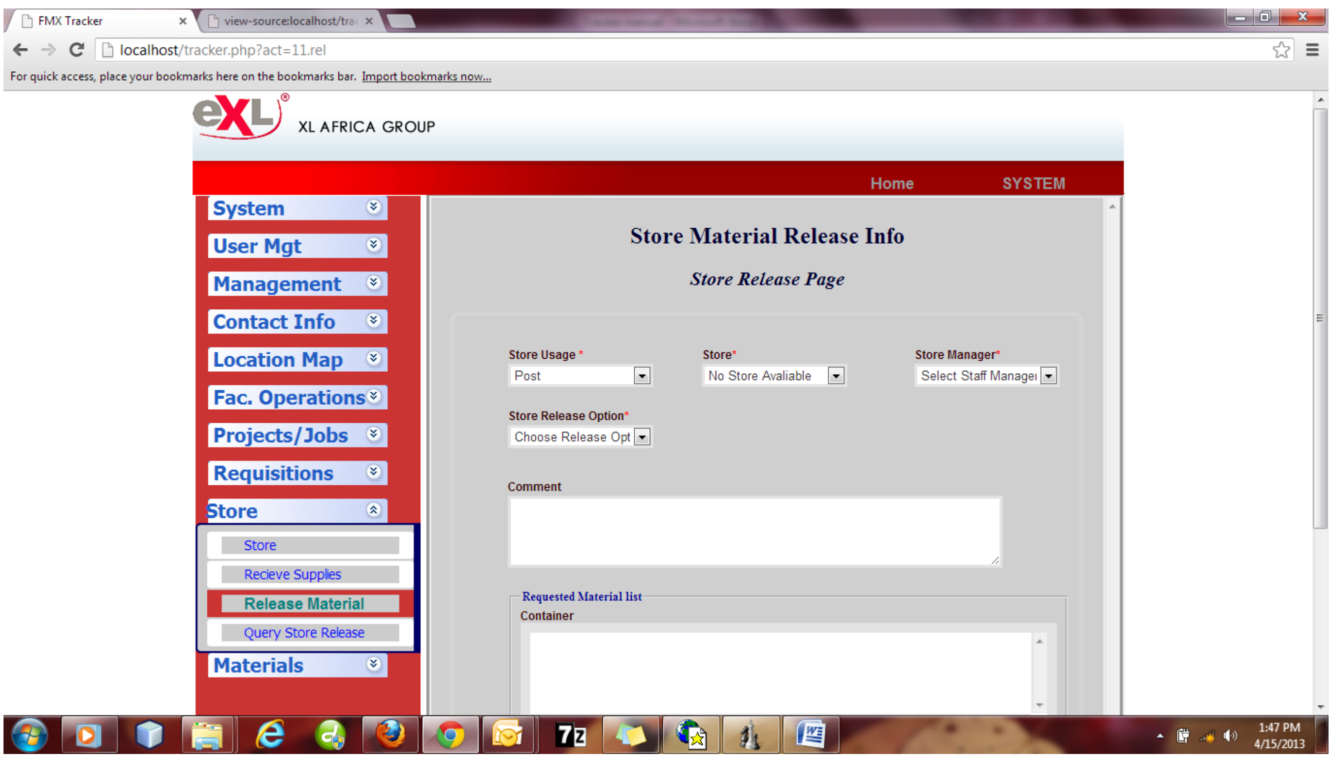

Fig. 18 Material Release

- **Release Material from Store**: Requirement: **Existing store/material**
    - Clicking on the **Release Material** sub menu of Store Menu opens the **Store Material Release** Page
    - Select Store level [Branch, Client, location] from the options displayed on **Store Usage** field.
    - Select the Store from the options displayed in **Store** field.
    - Choose the Store Release option from **Store Release Option**.
    - Choose the corresponding item from the options displayed by Tracker
    - Check the **Select Material Item** checkbox to open the **Material Insertion** subsection.
    - Using the **Item Group Name**, **Material Group** and **Material** select options; and **Quantity** input field with **INSERT MATERIAL** button to upload the corresponding materials.
    - Fill in any other required fields.
    - Click the Save Details to record material release.

Store Query

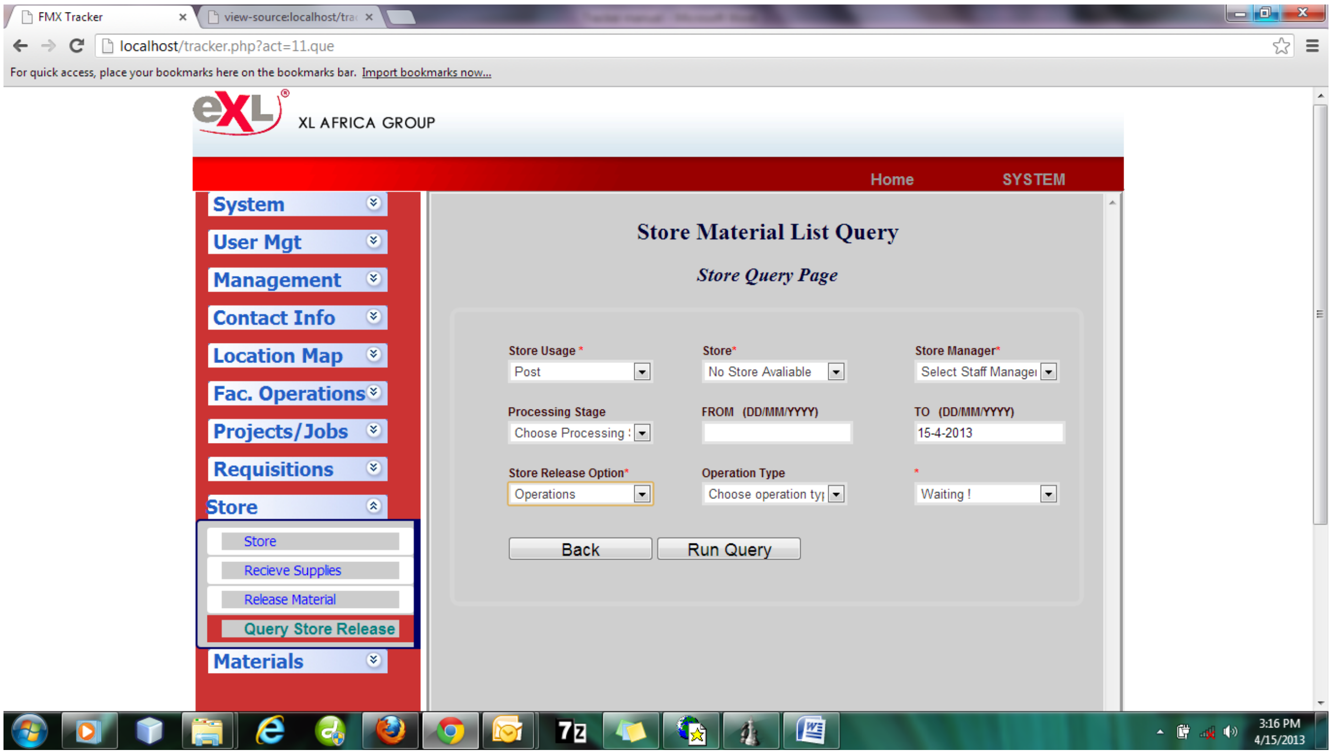

Fig. 19 Store Query

- **Query Store Release**: Requirement: **Existing Store**
  - Clicking on the **Query Store Release** sub menu of Requisition Menu opens the **Requisition/Expense List Query** Page
  - Select Store level [Branch, Client, location] from the options displayed on **Store Usage** field.
  - Select the Store from the options displayed in **Store** field.
  - Choose the processing stage from the option on **Processing Stage** select options.
  - Fill the **FROM (DD/MM/YYYY)** (From Date) and **TO (DD/MM/YYYY)** (to date).
  - Choose the Store Release Option from the option on **Store Release Option** select options.
  - Select/Fill the appropriate values in the fields displayed by Tracker.
  - Click on the **Run Query** Button and wait for Tracker to display the result.

Materials

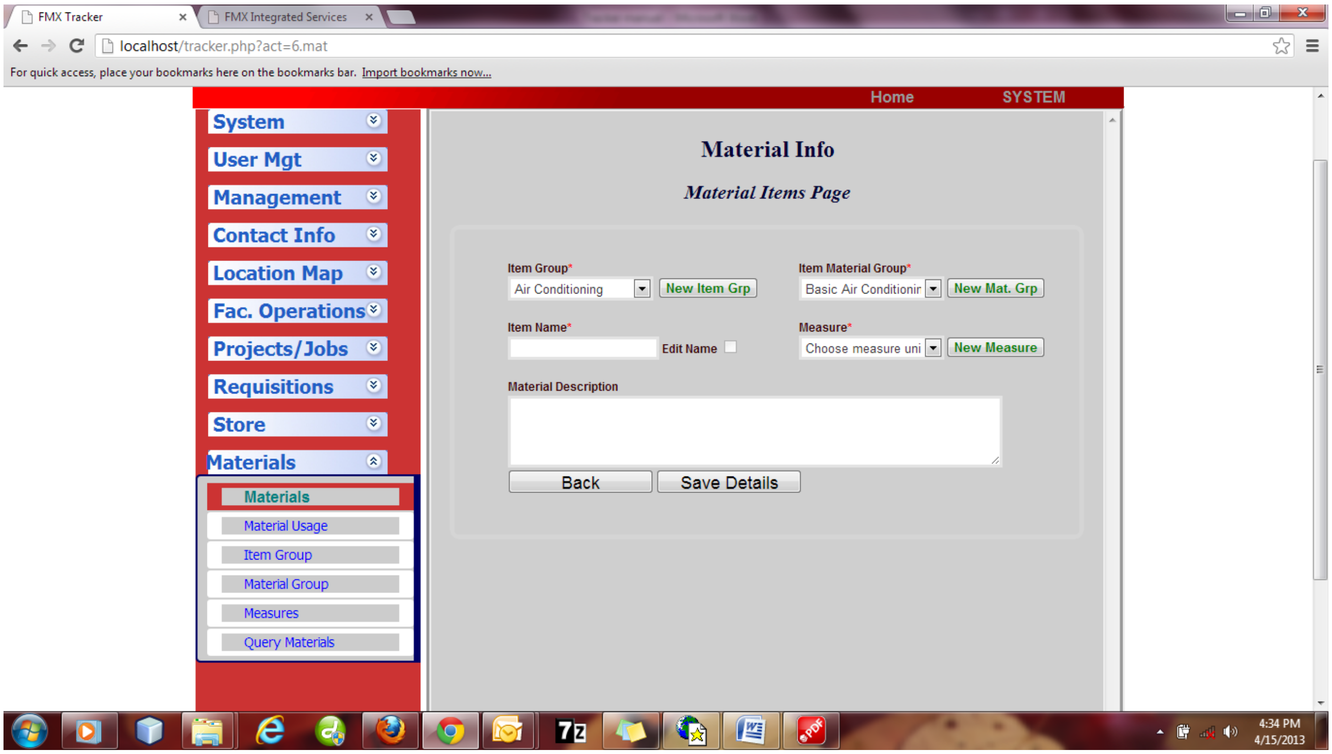

Fig. 20 Material

- **Materials**: Requirement: **None**
  - Clicking on the **Materials** sub menu of Materials Menu opens the **Material Item** Page
  - **Create:**
    - Choose the Material classification groups from the option displayed on **Item Group** and **Item Material Group** select option.
    - Enter the Material Name on the **Item Name** field and click outside the field for Tracker to check if the name exists (use the **New Item Grp** and **New Mat. Grp** buttons to create new option if required).
      - If already existing material, Tracker gives the option of loading to edit material.

    - Choose the **Measure** select option (use the **New Measure** to create un-existing measure option).
    - Enter any material description.
    - Click Save Details Button to save record
  - **Edit:**
    - Choose the Material classification groups from the option displayed on **Item Group** and **Item Material Group** select option.
    - Enter the Material Name on the **Item Name** field and click outside the field for Tracker to check if the material exists in the selected class.
      - If material exists, Tracker loads the fields for edit.
    - Edit the required fields.
    - Click Save Details Button to update record.
  - **Edit Material Name.**
    - Load the material as described above in the **Edit**
    - Check the Edit ID field to enable the **Item Name** for Edit.
    - Edit and enter the preferred material name and click outside the field.
      - Tracker alerts you when there is a conflict with an already existing material name.
    - Click Save Details Button to update record.

- Material Usage: Requirement: **Operation/material**

  - Clicking on the **Material Usage** sub menu of Materials Menu opens the **Material Usage** Page
  - Choose Operation Type from the **Material Usage** select options
  - Choose corresponding Item from the options displayed by Tracker
  - Select the material using the **Item Group Name** and **Material Group** and **Measure** select options. Fill the quantity field.
  - Select the **Material Procurement** option and fill the corresponding fields.
  - Click Save Details to update attach material to operation.

- Item Group: Requirement: **Operation/material**

  - Clicking on the **Item Group** sub menu of Materials Menu opens the **Item Group** Page
  - **Create:**
    - Enter the Group name in the **Item Group Name** field and click outside the field to allow Tracker verify conflict with existing name.

        - Tracker alerts you if the name already exists, and will load for edit if you want.
    - Fill in the description in the **Group Desc** field.
    - Click Save Details **button** to create Item Group.
- **Edit:**
    - Enter the Group name in the **Item Group Name** field and click outside the field to allow Tracker verify conflict with existing name.
    - Tracker alerts you if the name already exists, and will load for edit if you want
    - Edit the description under the **Group Desc** field.
    - To open the Item Name for Edit, check the **Edit Name** checkbox; and edit the Item name.
        - Click outside the field for Tracker to verify conflict with existing Item name.
        - If Item name exists, Tracker gives an option of loading or canceling operation.
        - Correct Item Name if required.
    - Click Save Details Button to update record.

- **Material Group**: Requirement: **Operation/material**

    - Clicking on the **Material Group** sub menu of Materials Menu opens the **Material Group** Page
    - **Create:**
        - Choose the Item group from the select options on **Item Group**
        - Enter the Material Group name in the **Material Group Name** field and click outside the field to allow Tracker verify conflict with existing name.
            - Tracker alerts you if the name already exists, and will load for edit if you want.
        - Fill in the description in the **Group Desc** field.
        - Click Save Details **button** to create Material Group.
    - **Edit:**
        - Choose the Item group from the select options on **Item Group**
        - Enter the Material Group name in the **Material Group Name** field and click outside the field to allow Tracker verify conflict with existing name.
        - Tracker alerts you if the name already exists, and will load for edit if you want
        - Edit the description under the **Group Desc** field if required.

        - To open the Material Group Name for Edit, check the **Edit Name** checkbox; and edit the Material Group Name.
            - Click outside the field for Tracker to verify conflict with existing Material Group name.
            - If Material Group name exists, Tracker gives an option of loading or canceling operation.
            - Correct Material Group Name if required.
        - Click Save Details Button to update record.

- **Measure**: Requirement**: None**

    - Clicking on the **Measure** sub menu of Materials Menu opens the **Material Group** Page
    - **Create:**
        - Enter the Measure Name on the **Conventional Name** field and click outside the field for Tracker to check if the name.
            - If already existing name, Tracker gives the option of loading to edit the measure.
        - Click Save Details Button to save Measure.
    - **Edit:**
        - Enter the Measure Name on the **Conventional Name** field and click outside the field for Tracker to check if the name.
            - If already existing name, Tracker gives the option of loading to edit the measure.
        - Check the **Edit Name** field to open the Measure name for Edit.
        - Edit the Measure name and Click Save Details Button to update Measure name.

- **Query Materials**: Requirement**:** **None**

    - Clicking on the **Measure** sub menu of Materials Menu opens the **Material List Query** Page
    - Select the search criteria of Interest among **Material Name**, **Material Description**, **Material Item Group** and **Material Sub Group** by checking the corresponding checkboxes.
    - Select the comparative terms of search for each selected search criteria and fill the corresponding field.
    - Click the **Send Query** button and wait for Tracker to display the result.

Management

Fig. 21 User Limit

- **Assign Approval Limit**: Requirement: **None**
  - Clicking on the **Set Limits** sub menu of Management Menu opens the **Limits** Page
  - Enter/Edit the fields corresponding to the staff functional positions.
  - Click on the Save Details Button to save Limits.
- **Set Client SLA**: Requirement: **Existing Client**
  - Clicking on the **Set Client SLA** sub menu of Management Menu opens the **SLA** Page
  - Select the Client's Post Branch from the **Branch Post** select options.
  - Select the Client from the **Client** select options. (Note if Client does not exist, Create Client from the **Client Info** sub menu on the **Contact Info** Menu).

- Select the Operation type from the **Operations Type** select options and wait for Tracker to display the available Type-IDs for the operation. If unavailable Type-ID class, **create Type-ID** from the corresponding sub menu on the **Facility Operations** Menu.
- Under the **SLA Target Days** subsection, select the matching Type-ID and enter the number of days in the corresponding **Days** field.
- Continue the above for all matching Operations type and Type_IDs.
- Click on the **Save SLA** Button to save Limits.

- **Reports**: Requirement: **None**

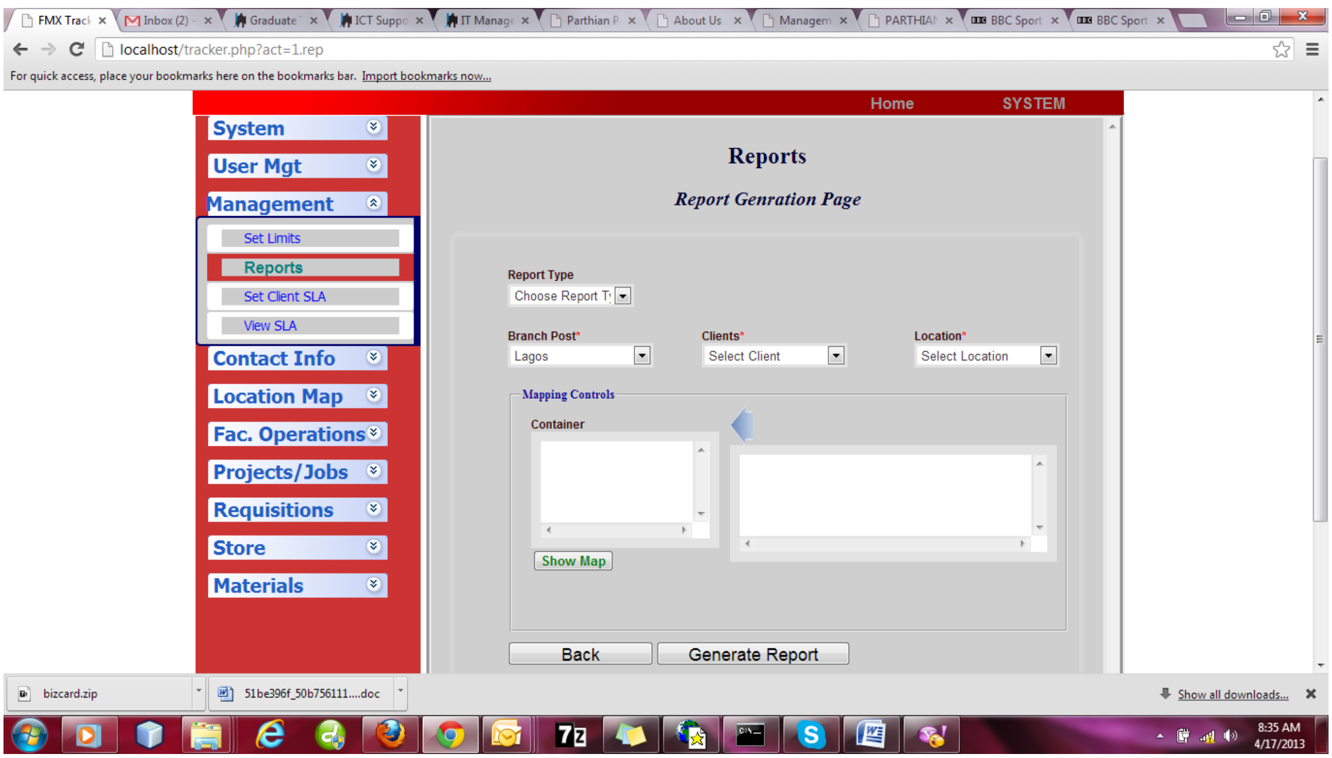

Fig. 22 Reports

- Clicking on the **Reports** sub menu of Management Menu opens the **Reports** Page
- Choose the report type from the **Report Type** select options.

    - If **Detailed Report** option selected, choose the **Operation Type** from the **Work Type** options displayed by Tracker to replace **Report Type** select option.
- Enter the report start period and the end period on the **Date From:** and **To:** fields respectively.
- Select the Post Branch, client and Client's Location from the **Branch Post**, **Client**, and **Location** select options respectively as desired report dictate.
    - If the report is desired on some limited area within a given location, select the subunit using the functionalities provided under the **Mapping Controls** subsection.
- Click on the **Generate Report** button and wait for Tracker to display report.

- **View SLA Report**: Requirement: **None**

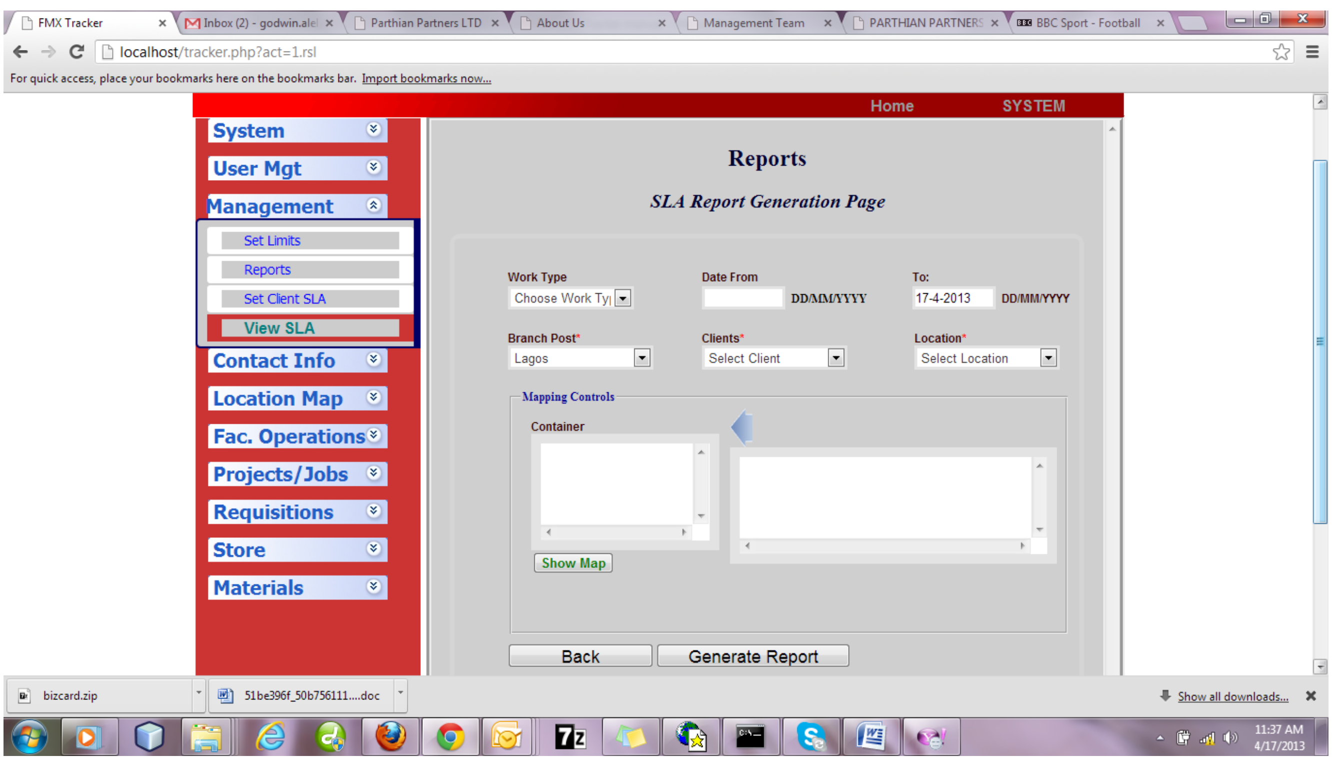

Fig. 23 SLA Report

- Clicking on the **View SLA** sub menu of Management Menu opens the **SLA Reports Generation** Page

- Choose the Operation Type from the **Work Type** select options.
- Enter the report start period and the end period on the **Date From:** and **To:** fields respectively.
- Select the Post Branch, client and Client's Location from the **Branch Post**, **Client**, and **Location** select options respectively as desired report dictate.
  - If the report is desired on some limited area within a given location, select the subunit using the functionalities provided under the **Mapping Controls** subsection.
- Click on the **Generate Report** button and wait for Tracker to display SLA performance analysis report.

Creating Type-IDs for various Operations. Refer to the corresponding Operations Type to learn how to create the various SLA types per operation type.

System Daily.

- **Run Daily**: Requirement**: None**
  - Clicking on the **Run Daily** sub menu of System Menu performs some required system daily procedures. Important.