User Manual

ProTrack v3.5.1

September, 2014

ProTrack

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1 General Information

1.1 System Overview

ProTrack is a web based application accessible over the internet via any internet browser. The purpose of ProTrack is to allow users to enter and track their projects for Gerard Professional Solutions.

1.2 Authorisation

ProTrack uses the Company's active directory for signing on. What does this mean? It means that you use your Windows username and password to sign on (your username is the first part of your email address). For example, jbloggs@gerardlighting.com.au, the username is jbloggs.

It is important to keep your logon details confidential and log off ProTrack when you have finished.

You will be automatically logged off the system after 3o minutes of inactivity.

2 System Summary

2.1 System Configuration

The system resides on an SQL and Web server. It is securely accessible via the World Wide Web. It can be accessed via any device which connects to the internet and has a web browser. This includes laptops, desktops and smart phones. The performance of ProTrack is partly dependent on the speed of the internet connection being used

We support the following browsers:

- Internet Explorer 8 and higher
- Firefox 3.6 and higher
- Safari 4 and higher
- Chrome 8 and higher

2.2 Data Flows

The status of the project follows certain business rules. These are outlined below.

From Status	Allowed to Status	Further comments
Raised	Active, Concept, Design Logged, Design in Revision, Cancelled	This status is automatically set when the project is entered See Active.
Active	Active (Builder Awarded), Active (Contractor Awarded), Sample, Design in Revision, Design logged, Lost, On Hold	Manual process once order is Raised
Concept	Active, Design in Revision, Design Logged, Cancelled, On hold	Manual process for pipeline projects
Sample	Active (Builder Awarded, Active (Contractor Awarded), Active (Wholesaler Awarded), Design in Revision, Design Logged, Won, Lost, Cancelled	
Design Logged	Design Completed, Design in Revision, Lost, Cancelled	Used by design department
Design in Revision	Design Completed, Design Logged	Used by design department
Design Completed	Active, Design in Revision, Design logged, Lost, Cancelled	Need to change to Active – manual process
Active (builder awarded)	Active (Contractor awarded), Sample, Design in Revision, Design logged, Cancelled, On hold	This status is automatically set when the builder is awarded.
Awarded (contractor awarded)	Won, Active (Wholesaler awarded), Sample, Design in Revision, Design Logged, Cancelled, On hold	This status is automatically set when the contractor is awarded.
Awarded (wholesaler awarded)	Won, Sample, Design in Revision, Design logged, Lost, On Hold, Cancelled	This status is automatically set when the wholesaler is awarded.
Lost	No changes can be made	
On hold	Active, Design in revision, Design logged	You must enter a reason
Cancelled	No changes can be made	You must enter a reason

Partially Won	Won	This status is set when you enter an order number and value
Won	Partially Won	This status is automatically set when all project requirements are met and an order number has been placed

Other project rules:

- If project is specified, a consultant or architect must be selected. Specified quote value must be entered.
- There must be at least one sales representative attached to a project.
- If project is marked for design, a designer must also be assigned.

2.3 User Access Level

There are four types of user access levels:

Level	User Type	Description
1	National	Can view all data
2	State	Can view all data for their assigned state NB: You can be assigned to multiple states
3	Sales Representative	Can view only their own data, i.e., projects assigned to them
4	Designer	Can view design projects

3 Getting Started

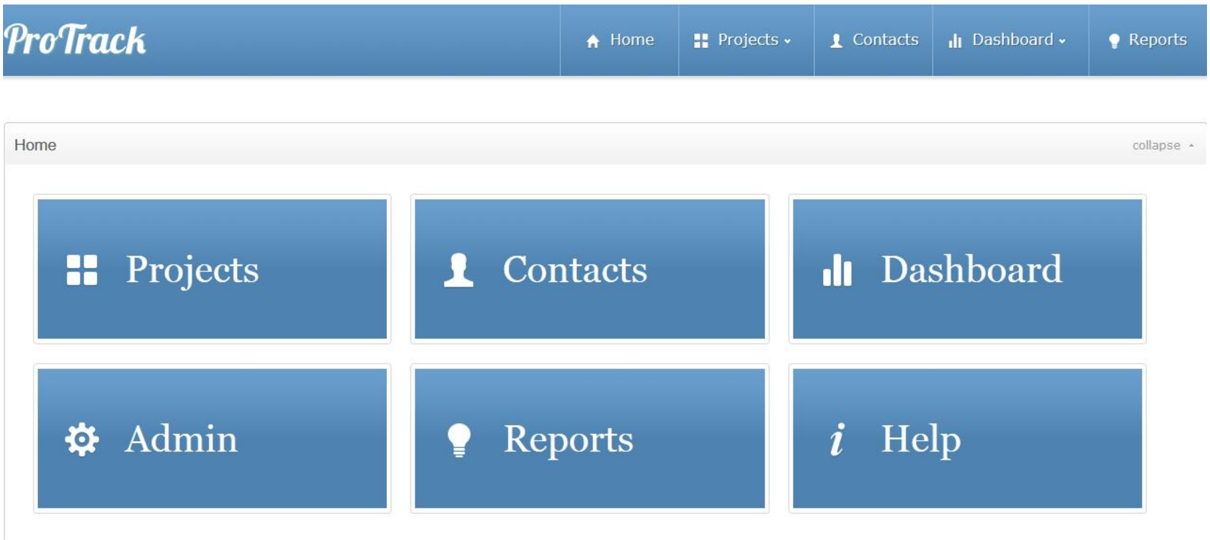
3.1 Accessing ProTrack

GPS http://protrack.gerardlighting.com.au/

3.2 Home Page

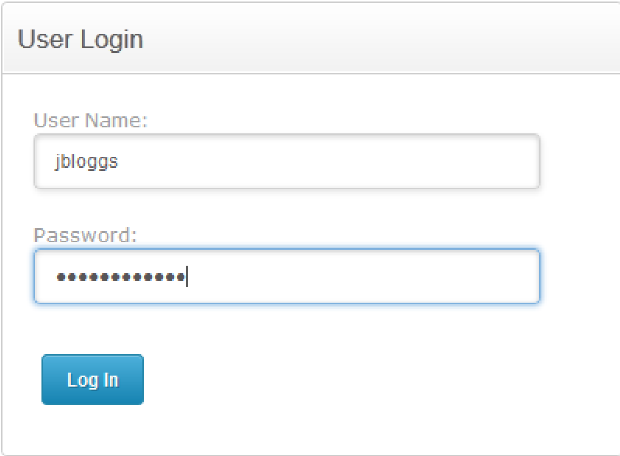
The home page allows you to access projects, dashboards, contacts and user manuals. Your assigned access level controls whether you can access these different areas. Refer to 2.3 for detail on the different levels.

- **Projects** – available to users with level 1, 2, 3, 4 access
- **Contacts** – available to users with level 1,2 access
- **Dashboard** – available to users with level 1, 2, 3, 4 access
- **Admin** – available to users with level 1 access only
- **Reports** – available to users with level 1, 2 access only
- **Help** – available to everyone



3.3 Logging On

With the exception of **Help**, if you click on any other button you will be prompted for your logon details.



Enter your Windows username and password and click the **Log in** button.

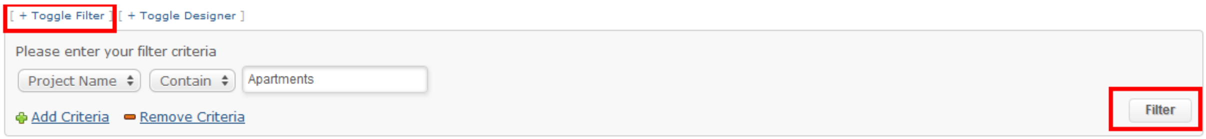
3.4 System Navigation

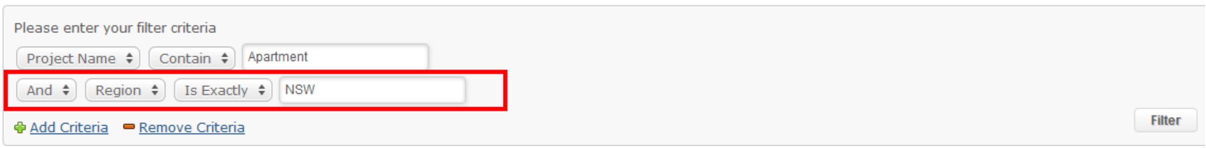
	Displays the projects the user is authorised to see. From here you can also create new projects.
	A user can create, search or update a contact. A contact has three levels: - Company, Branch, Contact Each Company must be assigned at least one Branch. Each Branch must be assigned an associated rep.
	The dashboards show counts and total values of certain fields against status types. You can click on a value to see the involved projects. All status calculations are based on the Quote Value or Quote Spec Value, except Partially Won and Won. These two status types are based on the calculation of the Order Number section of project
	Control user’s access levels. Can also view what Company branches are assigned to the user.
	Allows users to run pre-defined reports depending on their region. As a state user / project champion you will only be authorised to reports in your region

Other Navigation features

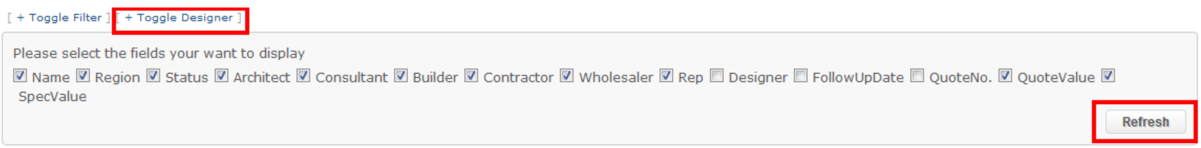
Throughout ProTrack we have created some useful features to help you search, filter, and extract data from the system.

- Toggle Filter
  - To filter the displayed list so you only display certain values
  - Below example will display a list of projects containing a Project Name with the word “Apartments”
  - Click on the Filter button to activate
  - Click +Add Criteria to add another field selection (e.g., Region)
  - Click –Remove Criteria to remove the filter





- Toggle Designer
  - To change the columns displayed on the screen
  - Select the fields you want displayed (this can also control what fields you want to extract to Excel)
  - Click on the Refresh button to activate



- Data Extraction
  -  Extract all values to Excel
  -  Extract only those fields you have selected in Toggle Designer (see above). This is a great way to reduce the fields extracted.

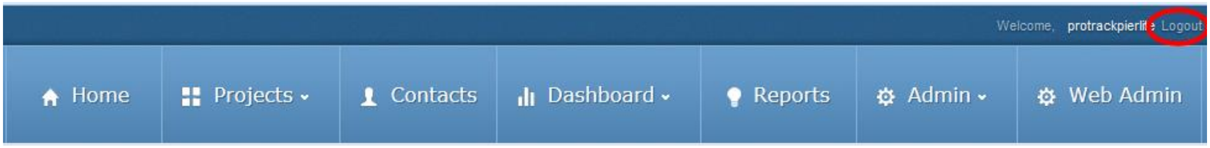
  Click on one of the above icons to extract the data that is currently displayed on your screen.

- Records per page 

 - Control the number of records displayed on the screen. The default will be 10 records per page.

3.5 Logging Off

To log off ProTrack, click the Logout link in the top right hand corner of the application.



4 Project Maintenance & Follow Up

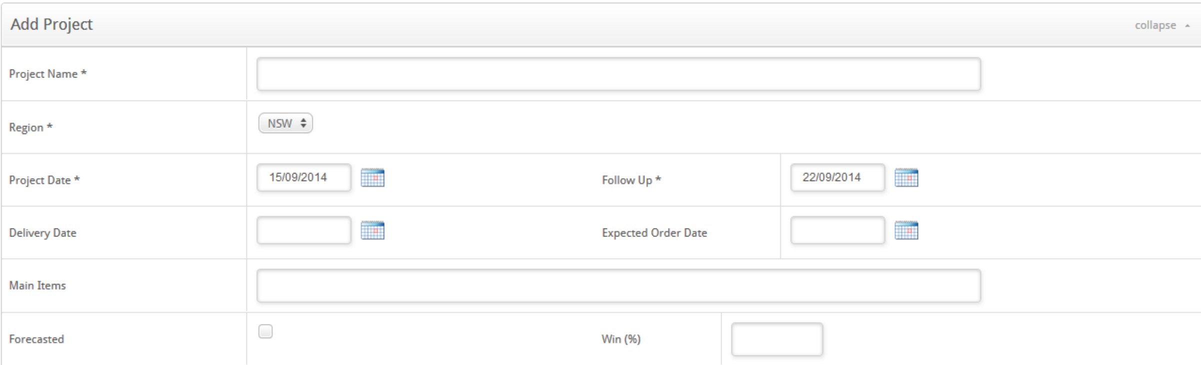
4.1 Creating a Project

On the Projects page click on the 

button. This can be found at the bottom of the screen.

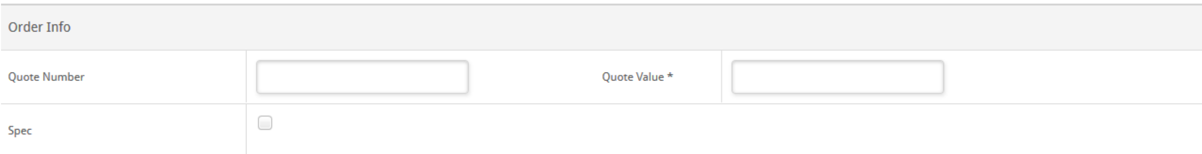
The screen is broken down into four sections. Please note fields followed by an asterisk (*) are mandatory.

Section 1 – Project detail



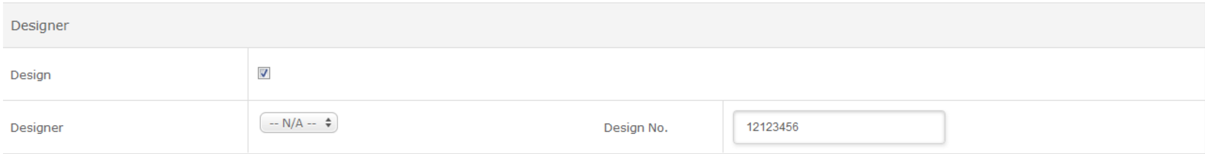
- **Project name** – enter the name of your project. This must be a unique name.
- **Region** – defaults to your assigned region.
- **Project date** – enter / confirm the project date.
- **Follow up** – enter / confirm the follow up date. This will default to today's date + 7 calendar days.
- **Main items** – enter the main items, product groups for this project
- **Forecasted** – if the probability of winning this project is in excess of 80% you can click the Forecasted option and enter the % likelihood of winning.

Section 2 – Order Detail



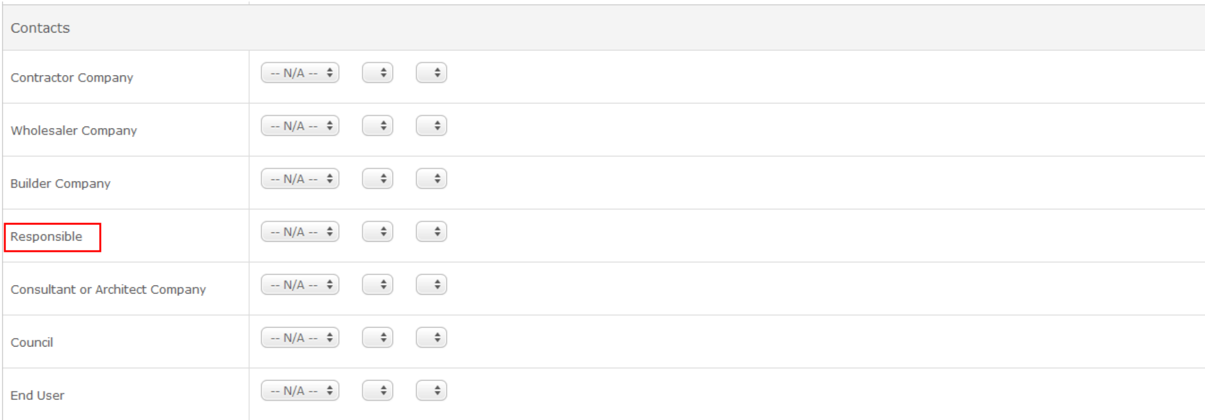
- **Quote number** – enter the quote number from Project Manager
- **Quote value** – enter the value of the project
- **Spec** – mark if the project is to be specified.
- **Spec Value** – if the project is specified you must enter the specified value

Section 3 – Design



- **Design** – mark here if the project requires design
- **Designer** – if the project is to be designed you must enter the relevant designer
- **Design No**. – this will automatically default to a number. You may change this.

Section 4 – Contacts



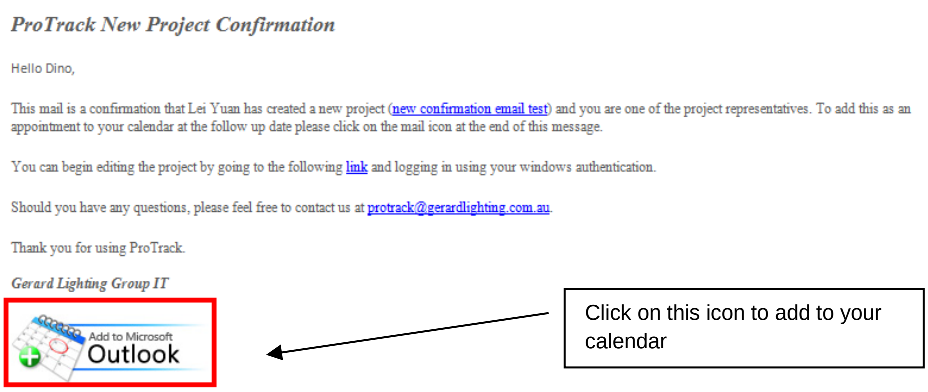
Enter the relevant contact information. If the project is specified you must enter an architect or consultant. You cannot have both in this version.

NB: Responsible Rep is the overall rep responsible for the project. This is used by management when reporting on ProTrack.

Once you have entered and validated all information click the  button to create the project. Any error messages (missing values) will be displayed at the top of the screen.

4.1.1 Email alerts

When a new project is added all associated representatives will be emailed about this new project. In the body of this email they have the opportunity to add this to their calendar as a follow up appointment.



ProTrack New Project Confirmation

Hello Dino,

This mail is a confirmation that Lei Yuan has created a new project (new confirmation email test) and you are one of the project representatives. To add this as an appointment to your calendar at the follow up date please click on the mail icon at the end of this message.

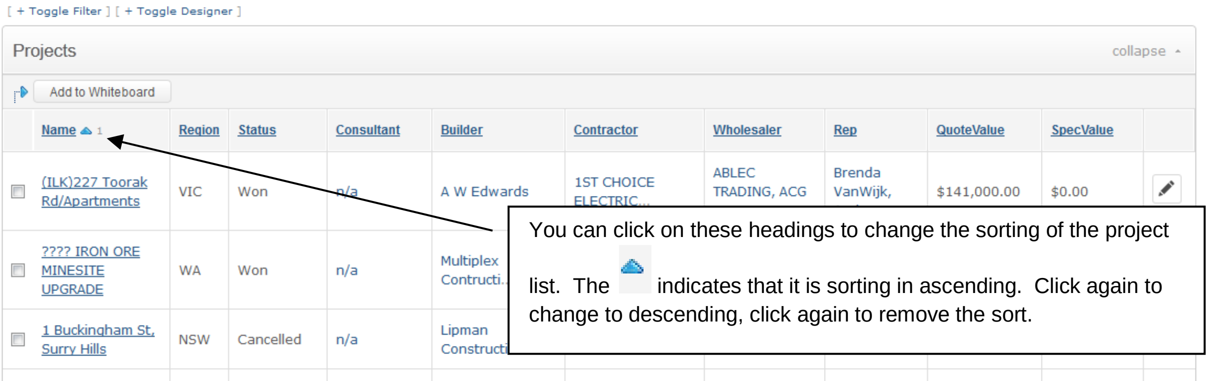
You can begin editing the project by going to the following link and logging in using your windows authentication.

Should you have any questions, please feel free to contact us at protrack@gerardlighting.com.au.

Thank you for using ProTrack.

Gerard Lighting Group IT

4.2 Changing / Updating a Project



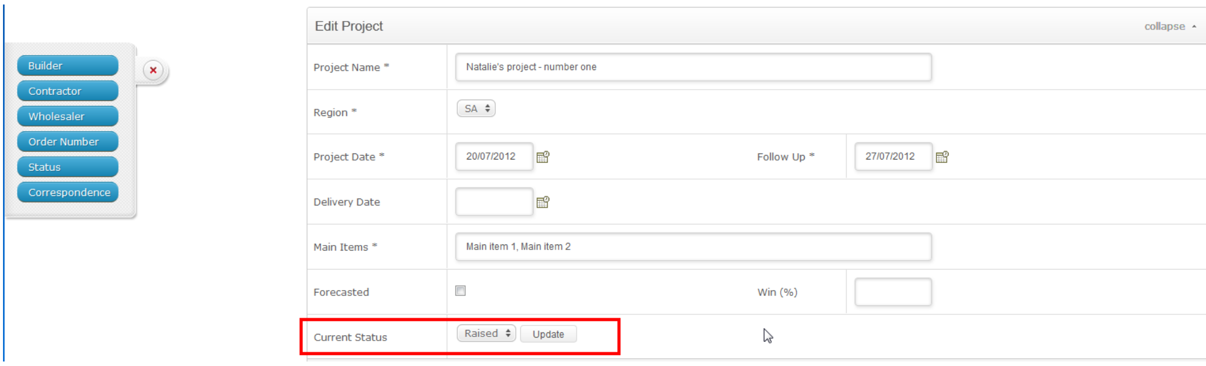
To access a project either click on the project name or click on the pencil on the far right hand side of the project.

Remember you can use the “Toggle Filter” feature to filter the project list.

4.2.1 Changing the Status

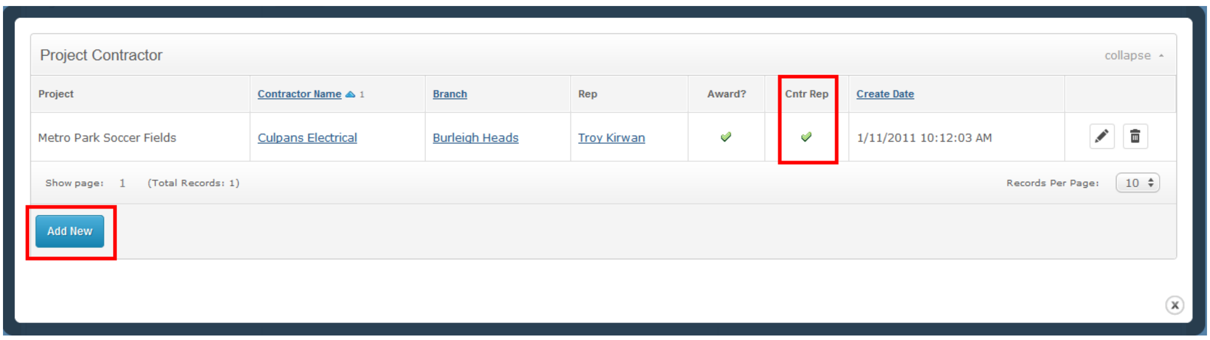
To change the status of a project select the status from the drop down list and <u>click update</u>. Please refer to section 2.2 of this manual for the rules regarding status change.

It is very important you <u>click update next to the status</u> for this to work correctly and update the status history.



4.2.2 Adding an additional contact

To add an additional contact, click on the relevant button to the left of the screen (e.g., ).



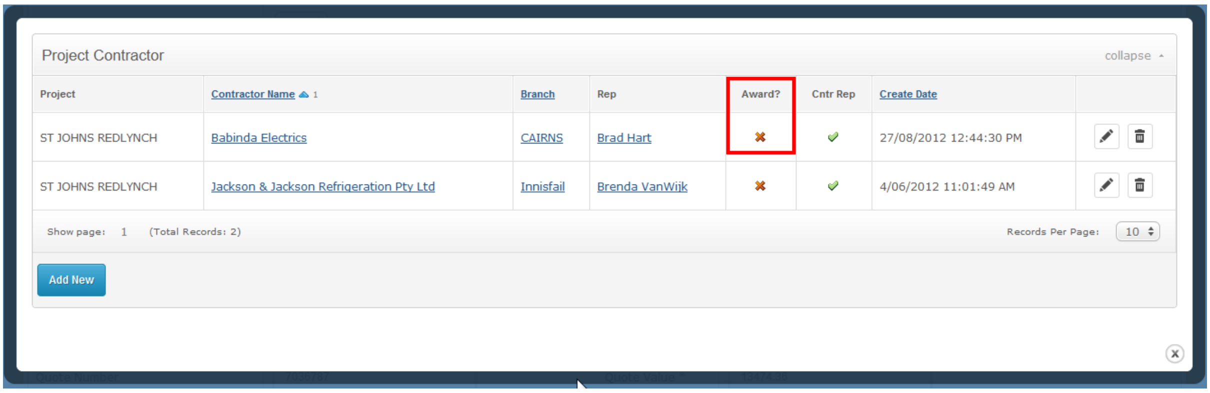
This will display a list of current builder, contractor or wholesaler contacts (depending on the button you selected). Click on the “add new” button to add an additional one. Enter the additional contact / branch details and click insert.

Contr Rep – This will default to yes. This means the rep is a controlling rep for the project – they are responsible for follow up. If you do not want them to receive follow up emails change this to a red cross. All controlling reps will receive the follow up email.

4.2.3 Awarding the project

To award the project to a Builder, Contractor or Wholesaler, click on the relevant button to the left of the screen. E.g. to award a contractor click on the 

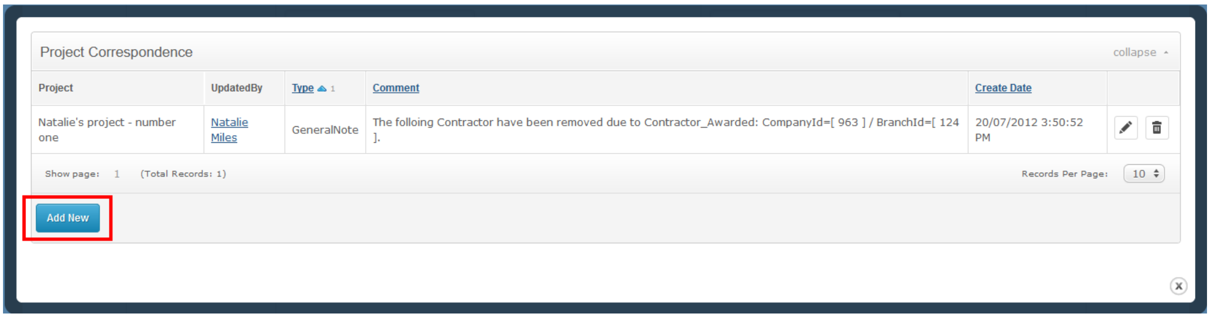
button. This will display a list of attached Contactor contacts.



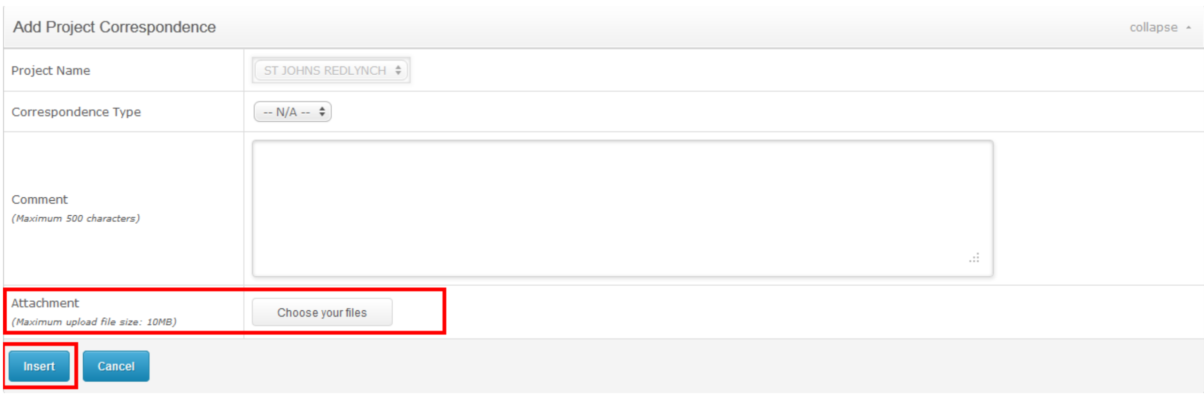
Click on the award red cross. This will change to a green tick meaning the project has been awarded. The status of the project must be at least active for this to work.

4.2.4 Adding Correspondence

To add any correspondence, select the correspondence button to the left of the screen.



A list of already entered correspondence will be displayed. Click on the "add new" button to add some new correspondence.

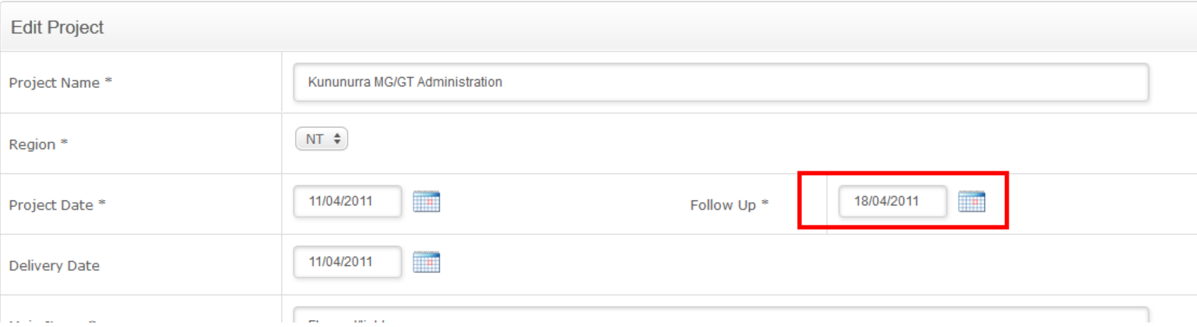


Enter the correspondence type and some comments.

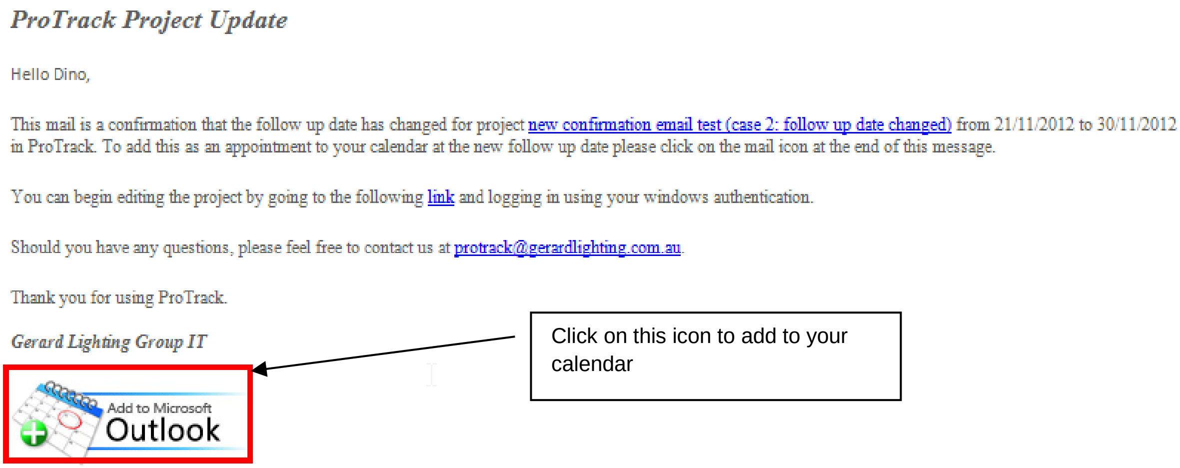
You can also attach any relevant documentation (e.g., the original quote) and upload to ProTrack. Click the "Insert" button to complete the correspondence. Please note you can upload multiple files at the same time.

4.2.5 Updating the follow up date – email sent to controlling reps

To change the follow up date simply click on the calendar icon to the right of the date and change to the new follow update.



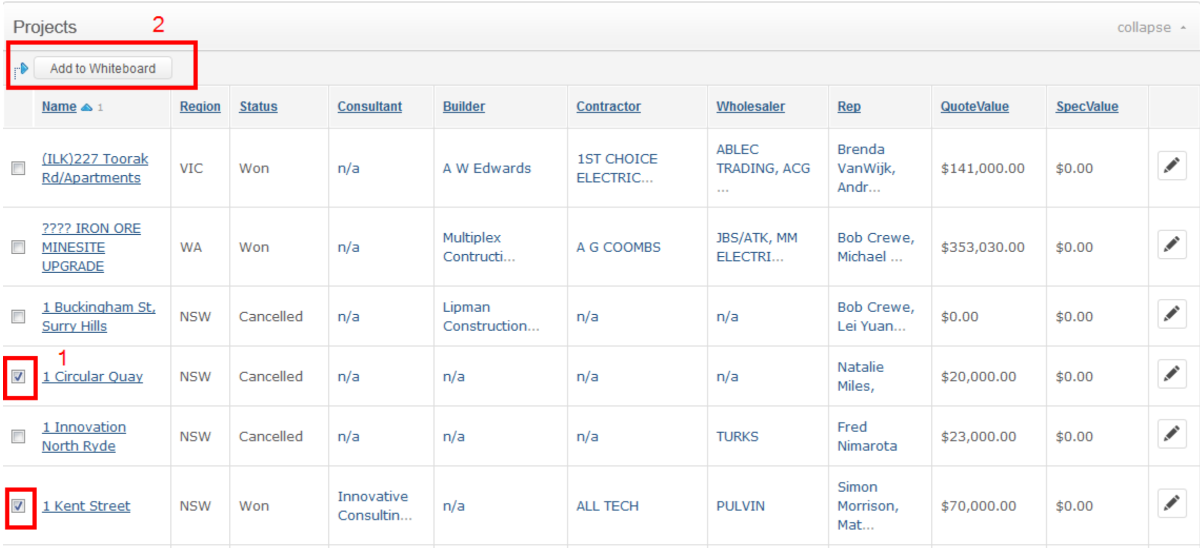
An email will be sent to all controlling reps for the project. In the body of this email they have the opportunity to add this new follow update date to their calendar as an appointment.



4.3 Projects Whiteboard

A whiteboard has been created to allow you to add certain projects that you need to particularly focus on and easily navigate to.

4.3.1 Adding a project to your whiteboard

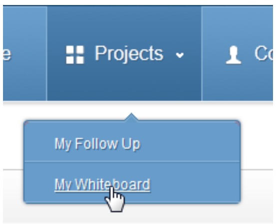


Name	Region	Status	Consultant	Builder	Contractor	Wholesaler	Rep	QuoteValue	SpecValue
(ILK)227 Toorak Rd/Apartments	VIC	Won	n/a	A W Edwards	1ST CHOICE ELECTRIC...	ABLEC TRADING, ACG ...	Brenda VanWijk, Andr...	$141,000.00	$0.00
???? IRON ORE MINESITE UPGRADE	WA	Won	n/a	Multiplex Contructi...	A G COOMBS	JBS/ATK, MM ELECTRI...	Bob Crewe, Michael ...	$353,030.00	$0.00
1 Buckingham St, Surry Hills	NSW	Cancelled	n/a	Lipman Construction...	n/a	n/a	Bob Crewe, Lei Yuan...	$0.00	$0.00
1 Circular Quay	NSW	Cancelled	n/a	n/a	n/a	n/a	Natalie Miles,	$20,000.00	$0.00
1 Innovation North Ryde	NSW	Cancelled	n/a	n/a	n/a	TURKS	Fred Nimarota	$23,000.00	$0.00
1 Kent Street	NSW	Won	Innovative Consultin...	n/a	ALL TECH	PULVIN	Simon Morrison, Mat...	$70,000.00	$0.00

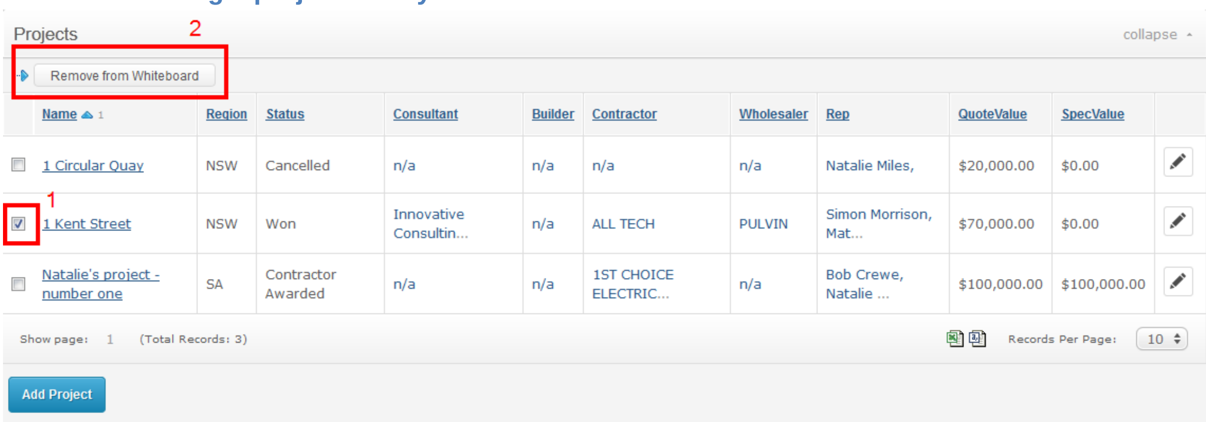
To add a project to your whiteboard, from the projects page on the left hand side of the project name mark the projects you want to add to your whiteboard and then click the "Add to Whiteboard" button at the top of your list.

4.3.2 Accessing your whiteboard

To access your whiteboard, from the projects page select **Projects > My Whiteboard**



4.3.3 Removing a project from your whiteboard

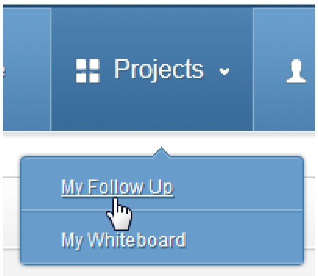


Name	Region	Status	Consultant	Builder	Contractor	Wholesaler	Rep	QuoteValue	SpecValue
1 Circular Quay	NSW	Cancelled	n/a	n/a	n/a	n/a	Natalie Miles,	$20,000.00	$0.00
1 Kent Street	NSW	Won	Innovative Consultin...	n/a	ALL TECH	PULVIN	Simon Morrison, Mat...	$70,000.00	$0.00
Natalie's project - number one	SA	Contractor Awarded	n/a	n/a	1ST CHOICE ELECTRIC...	n/a	Bob Crewe, Natalie ...	$100,000.00	$100,000.00

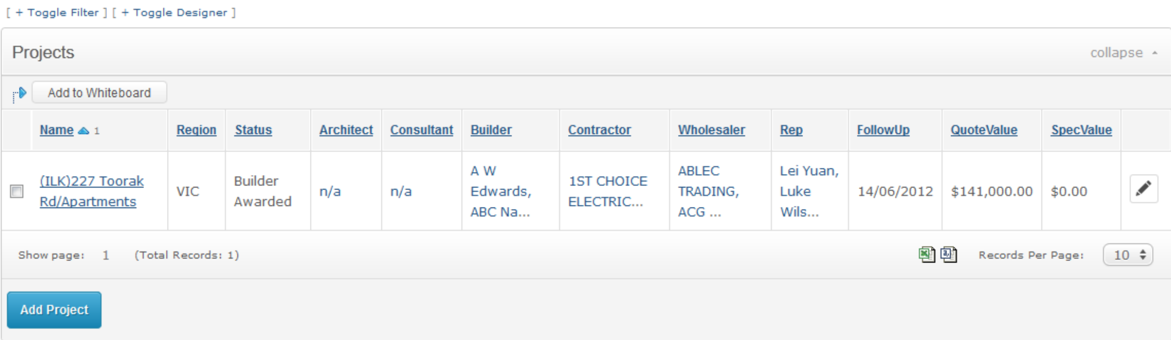
To remove a project from your whiteboard, from the projects page on the left hand side of the project name mark the projects you want to remove and then click the "Remove from Whiteboard" button at the top of your list.

4.4 Follow Up Projects

To view a list of projects that have passed the follow up date, from the projects page select **Projects > My Follow Up**



This will display a list of projects that have passed the follow up date and must be updated, followed up as soon as possible. It will only show the projects where you are a controlling representative.

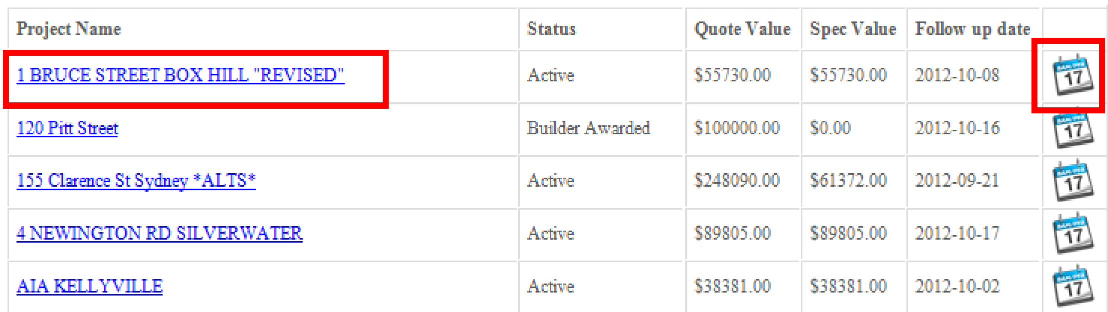


4.5 Weekly follow up emails

Each Monday every rep associated with a project (note they must be a controlling rep) will be emailed a list of projects that have passed follow up or are due for follow up that week.

This will not include Won, Lost or Cancelled projects.

They can click on the hyperlink to access the project or they can add to their calendar as an appointment reminder.



Project Name	Status	Quote Value	Spec Value	Follow up date	
1 BRUCE STREET BOX HILL "REVISED"	Active	$55730.00	$55730.00	2012-10-08	17
120 Pitt Street	Builder Awarded	$100000.00	$0.00	2012-10-16	17
155 Clarence St Sydney *ALTS*	Active	$248090.00	$61372.00	2012-09-21	17
4 NEWINGTON RD SILVERWATER	Active	$89805.00	$89805.00	2012-10-17	17
AIA KELLYVILLE	Active	$38381.00	$38381.00	2012-10-02	17

Individual email appointments will also be sent to associated controlling reps when a follow up date changes.

5 Contact Maintenance

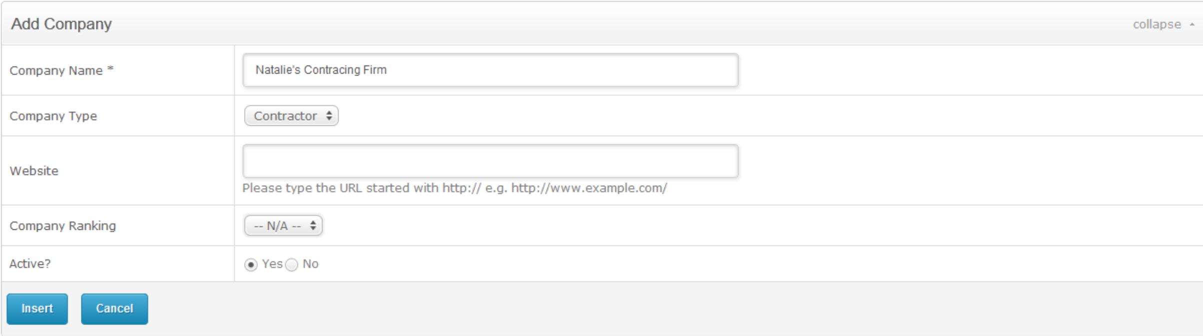
5.1 Adding a new Company

From the Home Page or the navigation section, at the top, click the 

button.

At the bottom of the screen click the 

button.



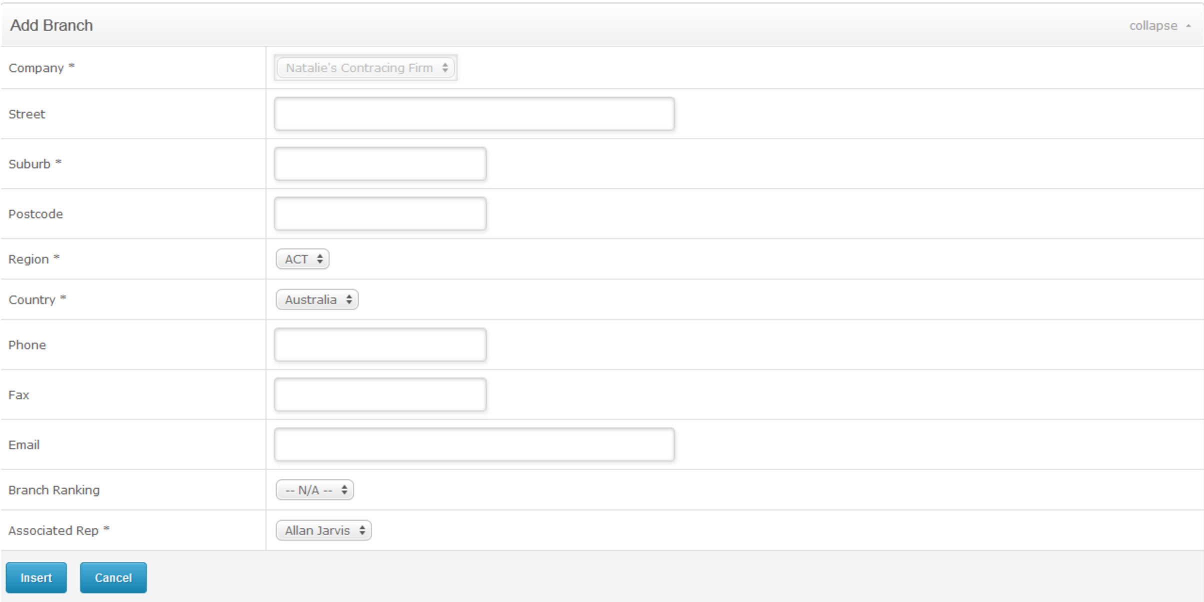
Add Company	collapse
Company Name *	Natalie's Contracing Firm
Company Type	Contractor
Website	Please type the URL started with http:// e.g. http://www.example.com/
Company Ranking	-- N/A --
Active?	Yes No
Insert	Cancel

- **Company Name** – enter a valid Company name. This must be a unique name. Before adding a contact make sure it is not already there.
- **Company Type** – click on the Company type and select valid type from the list.
- **Website** – enter the Company's website if known
- **Company ranking** – optional field to rank the entire Company. Will be used in reporting. This is not mandatory and it may be more applicable to rank the individual branch.

Click on the 

button.

You will now be prompted to enter at least one branch. Every Company must have at least one branch assigned.



Add Branch	collapse
Company *	Natalie's Contracing Firm
Street	
Suburb *	
Postcode	
Region *	ACT
Country *	Australia
Phone	
Fax	
Email	
Branch Ranking	-- N/A --
Associated Rep *	Allan Jarvis
Insert	Cancel

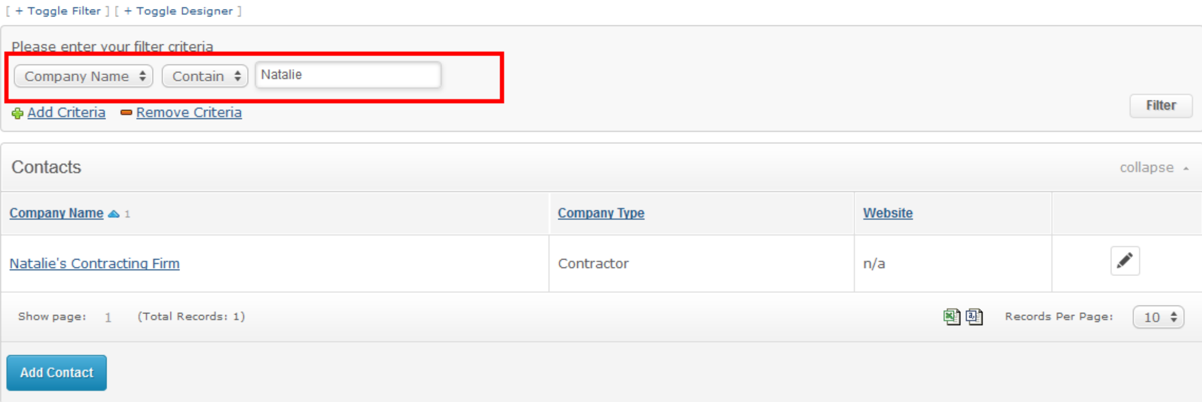
- **Suburb** – enter the suburb of the branch
- **Postcode**

- **Region**
- **Country**
- **Phone, fax and email**
- **Branch Ranking** – if applicable enter the relevant ranking for this Company / Branch. E.g., is this one of your top contractors? If so select A.
- **Associate Rep** – enter the sales representative associated with this branch

Click on the Insert button to attach the branch to the Company.

5.2 Adding a new Branch to an existing Company

When the Company already exists and you only need to add a new branch, go to the Contacts page and use the + Toggle Filter option to find the Company.



Click on the Company Name to maintain. A list of existing branches will be displayed. Click on the Add Branch button to add a new one.

Enter all relevant details for the Branch and click insert to add.

5.3 Adding a contact to a Branch

To add a contact name to a branch, go to the Contacts page and use the + Toggle Filter option to find the Company.

Click on the relevant Company Name to display a list of attached branches.

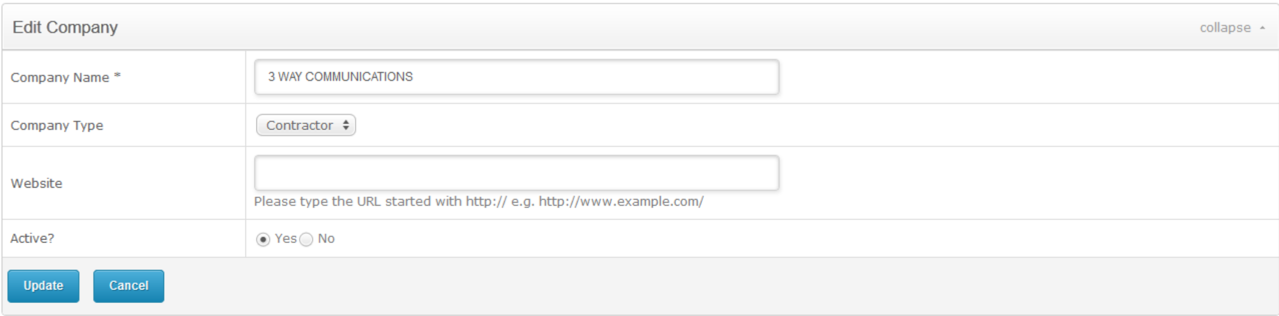
Click on the relevant Branch name to maintain.

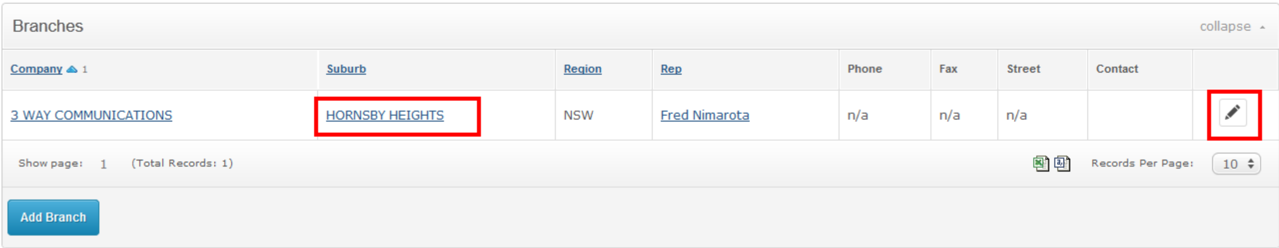
Click on the Add Contact button to add a contact name to the Branch. Enter the details and insert.

5.4 Changing an associated rep or ranking against a branch

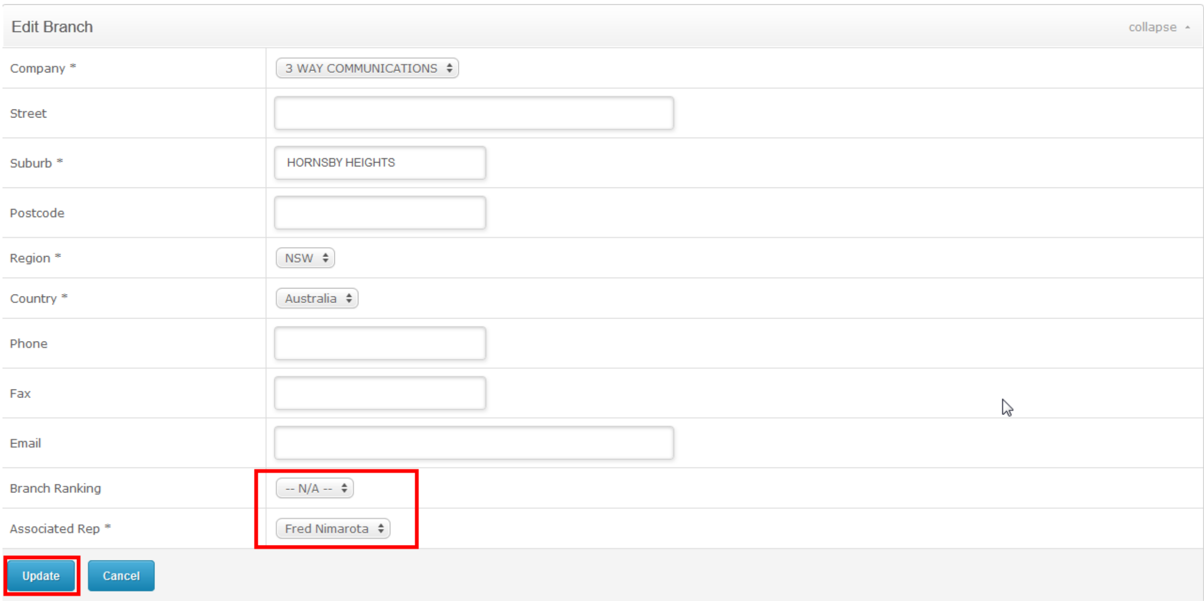
Go to the Contact page and filter for the right Company.

Click on the Company name to go the relevant branch. This will take you to the “Edit Company” page listing all branches attached





To change the rep or ranking either click on the Suburb name or the pencil icon (NOT the company name). This will take you to the “Edit Branch” page



You can now change the rep or ranking by clicking on the name to bring up the list

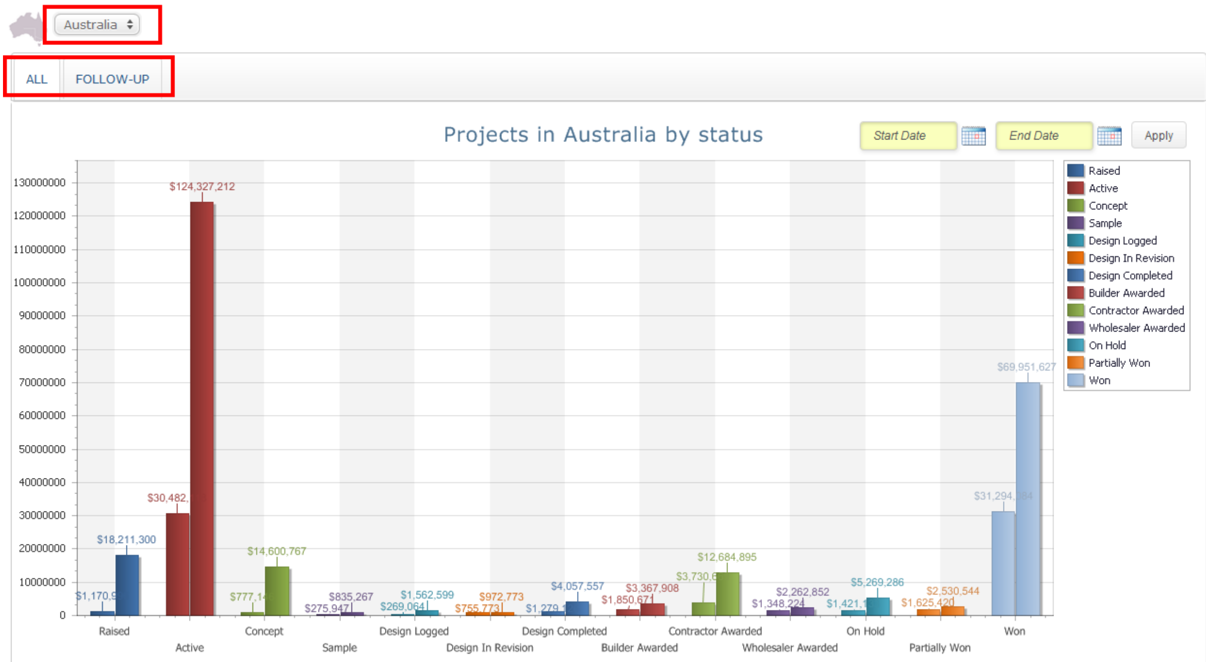
6 Dashboards

6.1 Internal Dashboard

The internal dashboard is available to all user access levels. It contains a summary display of projects in the system by status and by sales representative.

If you are a sales representative you can only view project detail you have been assigned to.

If you are a state user you can view projects assigned to your state.



If you are a National user you can view this information at a National level or by state.

There are two columns of information display per status. The first column is the specified value the second column is the project value. For "Won" and "Partially Won" the values are the actual order value and order specified value entered.

Click on the bar chart to take you to the project details for the relevant status. You can then extract this information to Excel if you want to further analyse.

To restrict the list to a date range (this is by project date) enter the start and finish date in the top right hand corner and click apply.

To see the same information but only for projects passed follow up date click on the follow up tab within the internal dashboard

There is also breakdown by Sales Representative. A state or national user can click on the names on the left hand side to check the data.

Rep in Region   collapse

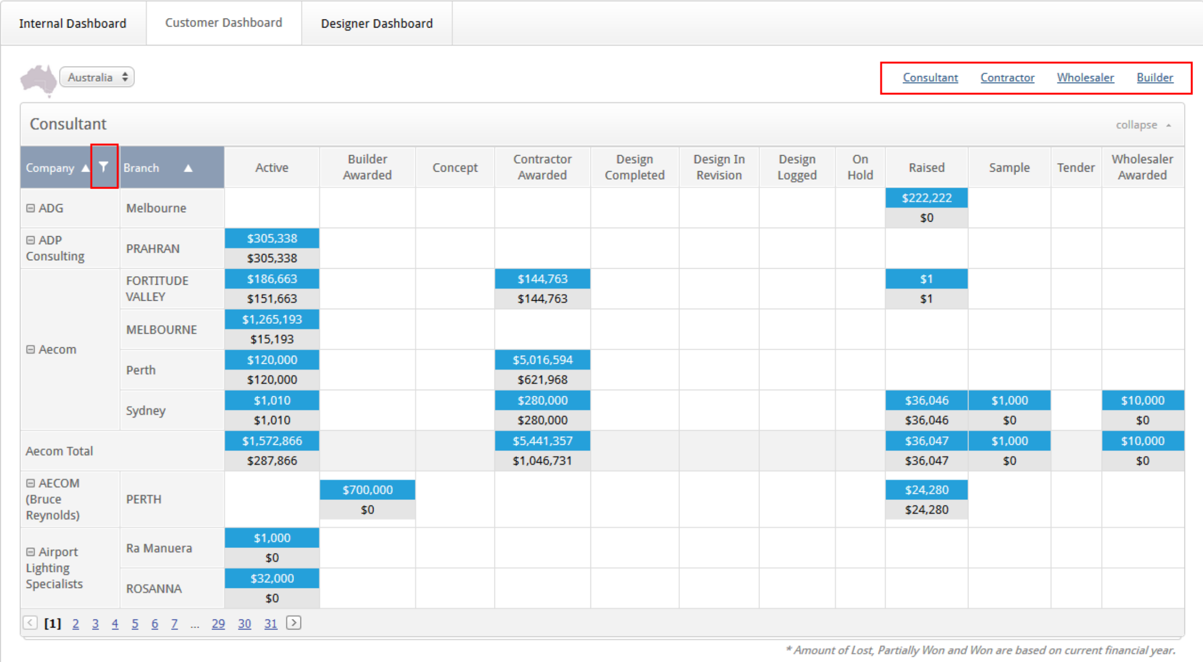
Rep	Status	Total	Quote Value	Spec Value
⊞ Allan Jarvis		37	$29,195,702.00	$21,465,220.00
⊞ Andrew Murray		9	$1,403,550.00	$501,336.00
⊞ Andrew Tiley		3	$3.00	$0.00
⊞ Andy Leung		3	$373,449.95	$173,449.55
⊞ Anthony Rogic		1	$35,220.61	$34,717.85
⊞ Bec Harper		16	$1,856,214.60	$1,122,506.97
⊞ Bill Patterson		1	$80,000.00	$0.00
⊞ Brad Hart		6	$56,001.00	$0.00
⊞ Brendan Ward		17	$24,622,736.00	$16,277,492.00
⊞ Brent Snashall		12	$939,143.73	$68,200.00

[1] 2 3 4 5 6 7

** Amount of Lost, Partially Won and Won are based on current financial year.*

6.2 Customer Dashboard

The customer dashboard is available to state and national users only. It contains a summary list of projects by Consultant, Contractor, Wholesaler and Builder.



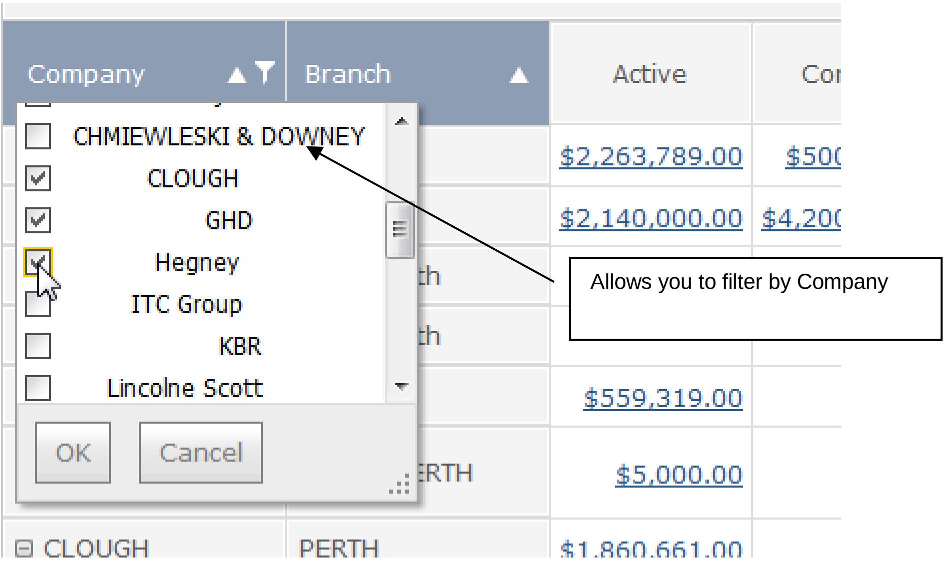
Company	Branch	Active	Builder Awarded	Concept	Contractor Awarded	Design Completed	Design In Revision	Design Logged	On Hold	Raised	Sample	Tender	Wholesaler Awarded
ADG	Melbourne									$222,222 $0			
ADP Consulting	PRAHRAN	$305,338 $305,338											
Aecom	FORTITUDE VALLEY	$186,663 $151,663			$144,763 $144,763					$1 $1			
	MELBOURNE	$1,265,193 $15,193											
	Perth	$120,000 $120,000			$5,016,594 $621,968								
	Sydney	$1,010 $1,010			$280,000 $280,000					$36,046 $36,046	$1,000 $0		$10,000 $0
Aecom Total		$1,572,866 $287,866			$5,441,357 $1,046,731					$36,047 $36,047	$1,000 $0		$10,000 $0
AECOM (Bruce Reynolds)	PERTH		$700,000 $0							$24,280 $24,280			
Airport Lighting Specialists	Ra Manuera	$1,000 $0											
	ROSANNA	$32,000 $0											

[1] 2 3 4 5 6 7 ... 29 30 31

* Amount of Lost, Partially Won and Won are based on current financial year.

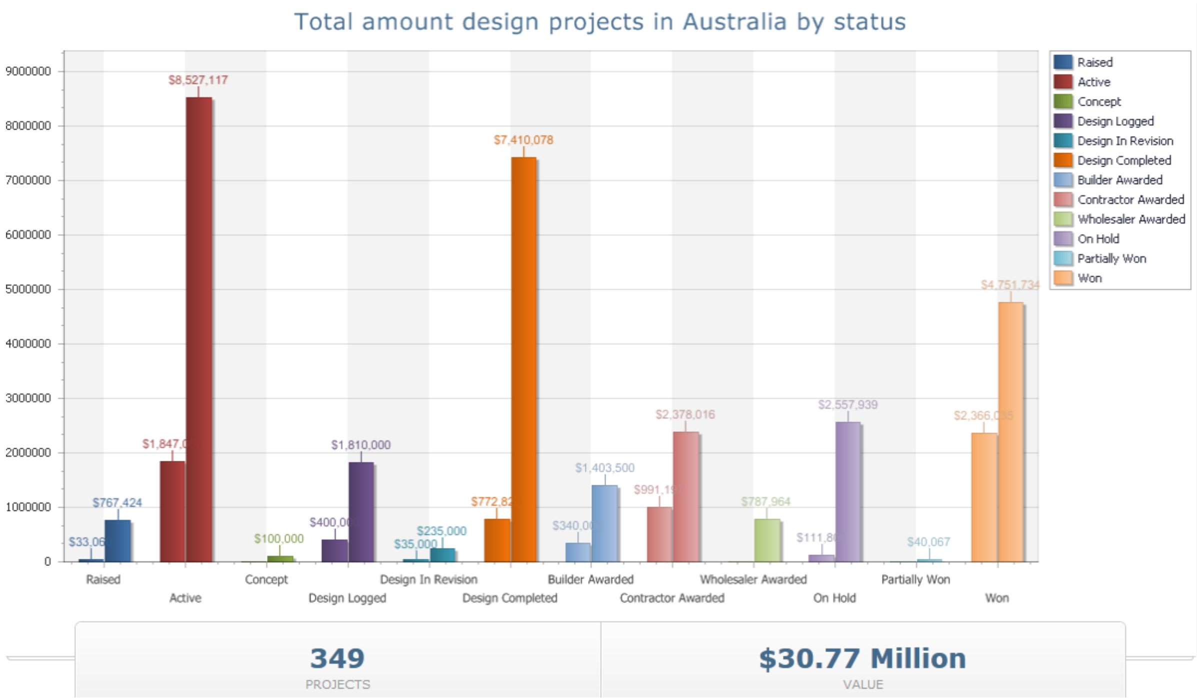
You can display a list of projects for a particular status by clicking on the value.

You can filter by Company by clicking the filter icon to the right of the Company heading.



6.3 Designer Dashboard

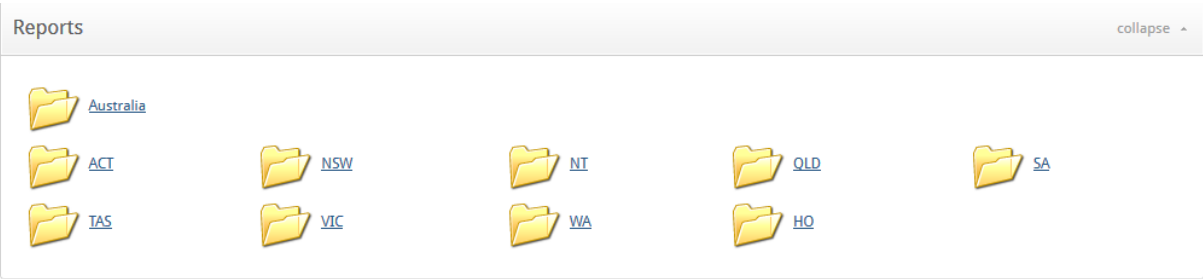
The designed dashboard is very similar to the internal dashboard but will only display a summary for projects that are design Projects.



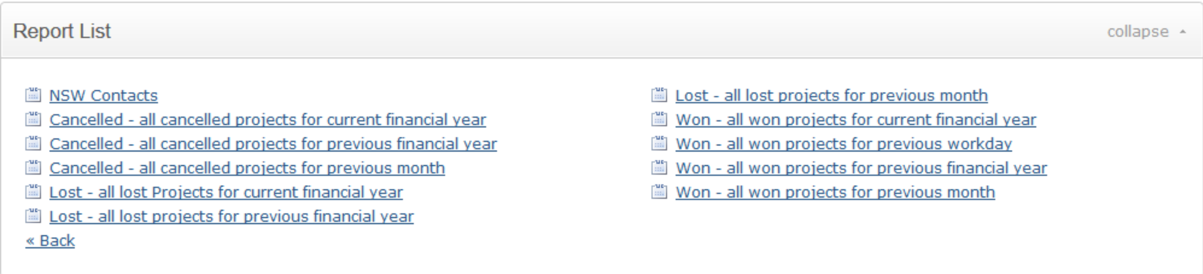
Again, you can click on the bar chart to take you to the project detail.

7 Reports

A reports section is available for authorised users to run pre-defined reports. Only National and State users are authorised to the reports section. A state user is only authorised to reports within their assigned state.



Clicking on your region will display a list of available reports.



Click on the report link to display the results.

Cancelled - all cancelled projects for current financial year

Project Name	Region	Status	Quote Value	Quote Spec Value	% Win	Comment	Date Cancelled	Month Cancelled	FY Cancelled
Park Fuels Terminal	NSW	Cancelled	12000.0000	0.0000	50.00	duplicated design	2014-07-30	2014-7	2015
162-166, Willougby Road, Crows Nest - SALLY	NSW	Cancelled	20000.0000	0.0000	50.00	Customer was only pricing D&C and using us only for design and estimates	2014-07-09	2014-7	2015
162-166, Willougby Road, Crows Nest - SALLY	NSW	Cancelled	20000.0000	0.0000	50.00	Job cancellations request from business.	2014-07-09	2014-7	2015
DUBBO HOSPITAL RE-DEVELOPMENT - alt package - at tender stage - SALLY	NSW	Cancelled	374447.0500	25231.2800		Contractor is on budget with original Spec and did not ask for alternatives this was a Matt job	2014-07-09	2014-7	2015

Show page: 1 (Total Records: 4) Records Per Page: 10

You can then extract to Excel for further analysis.

Any report request must go through Marty Kaye.

8 Help

The Help section 

of ProTrack contains some useful information regarding ProTrack releases, frequently asked questions and an easy email form to send any questions you may have.

8.1 F.A.Q

The frequently asked questions section briefly answers commonly asked questions.

8.2 Download user manual

Download this manual so you have a copy with you.

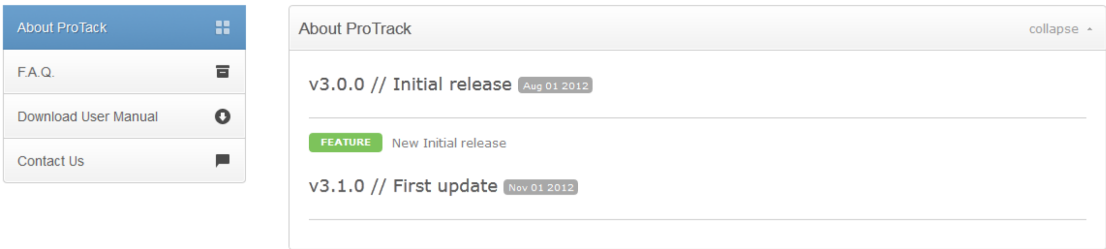
8.3 Version Control – About ProTrack

Any changes / bug fixes to ProTrack will be managed using version control. This will allow us to track all requests and give you an estimate as to when they will be uplifted to the live system.

ProTrack will be assigned a version number, e.g., v3.0.0. The version number is made up of 3 digits:

- The first digit – represents a major release. This is for considerable changes to the system requiring project management and considerable resource (e.g., link to Project Manager).
- The second digit – represents a minor release. This will be for minor approved change requests from the business. There will be 4 minor releases per year.
- The third digit – represents bug fixes to the current release. These will be applied as soon as possible.

You can keep track of change requests, bug fixes under the Help section of ProTrack => About ProTrack



This will detail what features will be included in each release.

8.4 Contact Us

If you encounter a problem with ProTrack please contact the email address. Please ensure you include as much detail in the message as possible.

Any change request to ProTrack must go through Marty Kaye and Fred Nimarota. These will then be analysed, approved (or not) and managed through version control.

<End>