Product Description

Track 'n Trend: Track and spot Trends like never before!

Track 'n Trend has been designed to be easy to learn and use. Its a tool for keeping, analyzing, and displaying tracked information such as financial, operations, events, and more. Once values have been entered, combinations of periods of time, for selected **Items** and selected data types (**actual, planned or standard**), can be reviewed. This selected data may be used to produce derived values including TRENDS. Any of the data sets of selected and **computed** data may be used to produce a graph. Data can be imported and exported via the TRACK Spreadsheet. Graph images and the graph spreadsheet values can be moved to other applications via the clipboard.

> **Use Formulas to get the most out of data entered for Tracked Items!**
>
> **Extensive display and report options are available!**
>
> **Retrieve data by relative dates and custom date ranges in addition to calendar periods!**
>
> **Graph data in 2D pie, 3D pie, 2D bar, 3D bar and line formats!**

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How To...

The following list of How To topics will provide you with a basic description of each function. Please refer to the specific window descriptions, the REVIEW program and the TIPS in Track n Trend for more information that can help you.

Getting Started

A tour of the application has been provided so that you may become familiar with the **Track 'n Trend** application quickly. Please take a look at the tour as the first step in using this application. Secondly, the TOUR outlines how to create your first database and we suggest creating a sample database to experiment with. These steps are probably the fastest way to learn how to use **Track 'n Trend**, and to see how powerful this application can be.

Please feel free to contact us. Even if you have not registered, we want to help you. We have spent countless hours developing this software. We believe it's the best software for the purpose it was designed, and we want to hear from everyone!

Creating a SAMPLE database

A method for creating a SAMPLE database has been included in Track n Trend. This is initiated by selecting CREATE A SAMPLE DATABASE under GETTING STARTED in the main window menu bar. A SAMPLE database will contain Tracked Items and one or two years of computer generated values for each Tracked Item. These generated values are created based on a initial values that you provide. This will provide a database with values, quickly, for learning or modeling purposes.

Hint: Using a SAMPLE database is probably the fastest way to learn more about Track n Trend.

Setting Up the Calendar

The purpose of entering a calendar is to put collecting statistics into perspective in terms of periods of time. The typical case would be a business that enters **actual** Tracked Item values on a daily basis. Perhaps **planned** data and **standard** data were entered as well. In any case, reviews of data will be on a business schedule: comparing this week to last, this month to last, a custom date range to another custom date range, **actual** to **planned**, and so on. A calendar, and daily values, is essential to accomplish this. Please see the description of the windows: **CALENDAR**, **HOLIDAYS** and **CUSTOM DATES** for more information.

The calendar is initially setup when creating a database. Basic dates and options are used to initially create the calendar. This can be changed later by using the setup option from the main menu bar. Select **GENERAL SETUP** under **DEFINITIONS** in the main window menu bar to access the calendar setup window. Holidays and custom dates can also be updated from this initial window.

Entering the calendar is fast and gives Track n Trend a lot of power!

Setting Up Items

Items include Tracked Items for which you will enter values. For instance Tracked Items may include: sales, salesmen, customer calls, units shipped, etc. Tracked Items are all of the topics that you want to keep statistics on.

Entering Tracked Items is described in detail in the **TRACKED ITEM AND FORMULA SETUP** window description. Two types of items can be defined in **Track 'n Trend**. Tracked Items are like those already mentioned above. A second type of item is a Formula. Values cannot be entered for Formulas, but rather values are calculated whenever the Formula is used. Formulas can include other Formulas.

Tracked Items are initially defined for a SAMPLE database when the database is being created, and you can select from some predefined Tracked Item descriptions. Databases that are not set up as SAMPLE databases are created with no Tracked Items.

Once a database exists new Tracked Items and Formulas can be entered. Tracked Items and Formulas can be edited or deleted as well. To access the maintenance window that allows these functions: select **TRACKED ITEM AND FORMULA SETUP** from **DEFINITIONS** in the main window menu bar.

Tracked Items and Formulas are often listed in description sequence so a technique for grouping items by the first characters in the description may be desirable.

Creating Formulas

While using the **TRACKED ITEM AND FORMULA SETUP** window, a new item can be defined as **Tracked** or **Formula**. When **Formula** is selected the **method** specification is replaced with a **Formula** button and a display line for the formula. Use the **Formula** button to display a build window for specifying the formula desired.

The build window uses notations for each selected field. This notation is the letter x followed by the internal Tracked Item or Formula identification number. This creates a short identifier. Use the build function to select each Tracked Item, Formula, operator and constant that you type in. The formula can also be edited directly in the formula text area.

To visually check the formula and to see it with expanded Tracked Item and Formula descriptions, use the **Expand** button. This button will display another window that will display the notated formula and an expanded formula with expanded Tracked Item and Formula descriptions with indentation to show the levels of each part of the formula. Nested (formulas called within a formula) formulas will be indented in the display.

Formulas may include parentheses and calculations are performed using mathematical precedence.

Entering Values

The detailed description of how to enter data for **items** is covered in the description of the **TRACK Spreadsheet window**. Entering data is done for each data type of **actual, planned and standard** separately. Values can be entered for each day or for a month. Daily values are entered into the database as you enter the values. Monthly values are prorated to the business days in the month. When monthly values are entered; all values already in the database for the month are replaced.

Note: Values can only be entered for Tracked Items.

In addition to keying in values, data may be imported via the clipboard from other applications including spreadsheet programs. All data that is imported is added to the bottom of the spreadsheet and the data type is ?. Each imported row must be resolved by adding or moving the values to another defined Tracked Item, creating a new Tracked Item out of the row, or deleting it.

New Tracked Items can be added to the database by typing in a description and values on the last row of the spreadsheet. The last row is always blank and available for the entry of a new Tracked Item.

Importing and Exporting Data

Importing data is completely handled in the TRACK Spreadsheet window. Data from other application such as spreadsheets, can be imported to **Track n Trend** using a paste command (or CTRL V keystroke). Data is added to the bottom of the spreadsheet as new rows and can then be incorporated into the database in several different ways.

Data can be exported to other applications at various places in **Track n Trend**. The following summarizes:

TRACK Spreadsheet

Select cells to be exported via the clipboard and use cut and copy functions to move the data to the clipboard. Paste the data in another application.

TREND Spreadsheet

Select cells to be exported via the clipboard and use cut and copy functions to move the data to the clipboard. Paste the data in another application.

Graph

Use the Clipboard option in the menu bar to place a color or monochrome copy of the graph on the clipboard. Paste the graph in another application.

Displaying the Calendar and Notes

The Calendar and Notes window offers a lot of information and is also used as a way to select a default date for reports, displays and queries.

Notes: The calendar has underlined numbers for days that have notes. Selecting the day will automatically display the note. Notes can be entered for any day and edited or removed.

Completeness: Radio buttons are provided to select actual, planned or standard for the purpose of checking the values for that data type for the month shown. The calendar will be coded or color coded to show the results. A legend window is available to describe the colors and codes.

Dates: Performing queries that are based on relative dates will use the last date selected in the calendar as the basis for the query. Displays and reports also use the last selected date as the initial value for the date for the display or the report.

Data Selection

The TREND button on the main window will present a parameter window that allows you to select combinations of Tracked Items/Formulas and dates. The consolidation method is specified. The selection and reporting style must be selected also. The selection and reporting style means that the values will be selected on one basis while the data is displayed on another basis. For instance: Months > Days, means that values will be selected for a month and displayed as individual days.

Once parameters have been selected, a macro name can be assigned. This allows later query that needs the same parameters to be quickly set from a macro name selection. This is particularly helpful for relative date queries. For instance: selection criteria can be set up to compare *this month* to *last month* - *this month* will be relative to the currently selected date from the Calendar Window.

Once the selection parameters have been entered and OK is clicked, the appropriate values are collected and a TREND Spreadsheet appears. Here data can be selected for graphs, some math can be performed including cumulating values and calculating TRENDS. Data can be exported as well.

Displaying Reports

Reports can be displayed for daily, weekly, monthly, quarterly and yearly periods. Different combinations of A/P/S values can be selected. When two A/P/S types are selected the third column is a variance. Displays can be initiated while using the TRACK or TREND spreadsheets.

Click on the DISPLAY button on the main window and make parameter selections for the display desired. The display will appear in a window for your review.

Printing Reports

Reports can be printed for daily, weekly, monthly, quarterly and yearly periods. Different combinations of A/P/S values can be selected. When two A/P/S types are selected the third column is a variance. Reports can be initiated while using the TRACK or TREND spreadsheets.

Click on the REPORT button on the main window and make parameter selections for the report desired. The report will be printed for your review.

Using the Clipboard

The clipboard can be used in several places in **Track n Trend!** This offers a lot of flexibility in interfacing with other applications, making the most of your data. Data can be imported from, or exported to, other applications like spreadsheets. Additionally, data can be exported to word processors making tables or displaying graphs. The following lists ways that the clipboard can be used to enhance the value of your data:

TRACK Spreadsheet

Import data from other applications (like a spreadsheet program).

Export data to another application (like a spreadsheet or word processor).

TREND Spreadsheet

Export data to another application (like a spreadsheet or word processor).

Graph

Export data to another application (like a word processor).

Import the clipboard data from an originating application. This is completed by using the originating application's CUT or COPY option and then using PASTE within **Track n Trend**.

Export the clipboard image, or data, to a destination application. This is completed by using the destination application's PASTE option.

Use the CLIPBOARD utility program distributed with WINDOWS to view what has been copied to the clipboard.

Windows

Main

The control center, and always visible.

Calendar Setup

Setup the database **calendar**.

Holiday Setup

Setup the **holidays**.

Custom Date Setup

Setup the **custom date ranges**.

Tracked Item and Formula Setup

Setup **items**.

Formula

Build a formula.

Formula Expansion

Display an indented list formula with item descriptions.

Create dB: Calendar

Setup a **calendar** for a new database.

Create dB: Items

Setup **items** for a new database.

TREND Parameters

Select items and date periods for review.

TREND Spreadsheet

Display selected data.

Graph

Graph selected data in various ways.

Report Parameters

Select a report for a date period and combination of A/P/S type.

Calendar and Notes

Select a date; enter and display daily notes.

Calendar Legend

Explains calendar color codes.

TRACK Parameters

Specify daily/monthly, date and A/P/S type.

TRACK Spreadsheet

Display, edit, import/export daily or monthly values for all items.

New Row Options

Determine how to handle new rows.

Display Parameters

Select a display for a date period and combination of A/P/S type.

Display Report

Display of items and values for given parameters.

Main Window

Access to everything in the **Track 'n Trend** database is accessible from this window. The menu bar includes standard control and option choices with a special selection of GETTING STARTED for newcomers. The row of icon buttons includes buttons for database access, data maintenance, viewing data and help. The following summarizes this window:

Menu Bar

All of the file, printing and exit options can be found here. Additionally, all of the access to HELP is included in the menu bar. Note that the repair and compacting options are under the FILE option. SAMPLE databases can be created by selecting the CREATE SAMPLE DATABASE under GETTING STARTED.

New

Create a new Track n Trend database.

Open

Open an existing Track n Trend database

TRACK

Specify daily/monthly and the A/P/S type, then manage the Tracked Items and values through the TRACK Spreadsheet. Import and export data.

TREND

Specify selection criteria and then review values in the TREND Spreadsheet and GRAPHS.

CALENDAR

Review a month at a time; select a date; review and enter daily notes.

DISPLAY

Display a report for selected items, date and A/P/S types.

REPORT

Print a report for selected items, date and A/P/S types.

HELP

Display the HELP file.

EXIT

Exit the Track n Trend program.

Calendar Setup Window

The **calendar** window is used to review, and modify your application calendar. The calendar is for the current database only. Each **Track 'n Trend** database will have its own calendar. The calendar establishes business days, closed days and holidays. The highlights of this window are:

From
Enter the first year that you want for entering data. No data will be deleted if you make this a later date than you have already entered data for.

Through
Enter the last year that you want for entering data. No data will be deleted if you make this an earlier date than you have already entered data for.

Preference
Choose the frequency for entering data.

First Day
Select Sunday through Saturday as the first day of your work week.

Number of days
Enter the number of consecutive work days in the work week.

A/P/S Types
Check all of the data types that you want from the list of **actual, planned and standard**. No data will be deleted if you clear a selection that formerly existed.

OK Button
Click on this button to update your database after all selections have been made.

Cancel Button
Click on this button to cancel pending changes and close the window.

Holidays Button
Click on this button to modify the holiday list.

Custom Dates Button
Click on this button to modify the custom dates.

Holiday Setup Window

This window provides you with the opportunity to create, and modify, the list of holidays for your **calendar**. The term holiday is used throughout **Track 'n Trend**, but may also include days that you are closed for inventory, or other purposes than traditional holidays. The following summarizes this window:

Holidays
A list of the holidays that for the database.

Edit Area
Select an item from ALL HOLIDAYS to edit or click on NEW for a new holiday.

Common Holidays
Click on this button to have the common holidays for a specified year created automatically. All holidays already defined for the selected year will be removed first.

Date
Enter a date for a holiday.

Description
Enter the description for the date entered.

New Button
Click on this button to clear all fields for a new date.

Remove Button
Click on this button to remove one selected holiday in the holiday list.

Save Button
Click on this button to update the date and description entered.

OK Button
Click on this button to update the calendar window. The database will not be updated until you select OK in the CALENDAR window.

Cancel Button
Click on this button to cancel pending changes and close the window.

Custom Date Setup Window

Custom date ranges can be established for date ranges that are not standard calendar periods. The highlights of this window are:

Custom Dates

Lists all of the custom date ranges with the start date and the number of (inclusive) calendar days in parentheses.

Edit Area

Select an item from ALL CUSTOM DATES to edit or click on NEW for a new custom date range.

Description

Enter a description for a custom date range.

From

Enter the first date of the custom period..

Through

Enter the last day of the custom period.

New Button

Click on this button to clear all fields for a new date range.

Remove Button

Click on this button to remove one selected date range.

Save Button

Click on this button to update the date and description entered.

OK Button

Click on this button to update the calendar window. The database will not be updated until you select OK in the CALENDAR window.

Cancel Button

Click on this button to cancel pending changes and close the window.

Tracked Item and Formula Setup Window

Use this window to create and maintain the definitions of the **Tracked Items** and **formulas**. Tracked Items are topics for keeping statistics such as SALES, CUSTOMER CALLS, etc. The following summarizes this window:

Tracked Items and Formulas
: All of the **Tracked Items and Formulas** that are currently in your database.

Edit Area
: Select a Tracked Item or Formula from the list of Tracked Items and Formulas to edit or click on NEW for a new Tracked Item or Formula definition.

Tracked Item or Formula
: For new items, select **Tracked Item** if values are to be entered. Select **Formula** to calculate a value from a combination of Tracked Items, Formulas and constants.

Long Description
: Select a predefined description or enter one.

Short Description
: A text area to enter a short description to use for labels in graphs. A generated value will be entered that can be changed. This should be just a few characters and is limited to five characters for graph data point descriptions.

Type
: Defines the value **type** for this item.

Method
: Defines how to handle the consolidation of the item. The **method** is not provided for formulas.

Formula Button
: This button appears when defining a formula. Click on this button to display the formula build window.

Formula
: Formula, in notation form.

New Button
: Click on this button to clear all fields for a new Tracked Item or Formula.

Remove Button
: Click on this button to remove the selected Tracked Item or Formula. Note that the Tracked Item or Formula cannot be in use in any formulas or macros.

Save Button
: Click on this button to update the Tracked Item or Formula entered.

Formulas
: All formulas that use the selected item, are listed.

Macros
: All macros that use the selected item, are listed.

OK Button

Click on this button to close the item setup window. The database has already been updated for each item via the SAVE button.

Cancel Button

Closes the window. All updates that have been completed remain in the database.

Formula Window

Items that are defined as formulas do not have values entered directly to them, but rather compute values as the item is used in displays and reports. To assist in creating the formula, a build function has been provided. Selecting Tracked Items, Formulas, operators or constants and then clicking on the ADD IN button will cause the defined entry to be added to the end of the existing formula. Use this function to quickly build the formula and then edit the formula text directly. The following summarizes this window:

Formula
: The text box that contains the complete formula, as currently defined. Edit the formula in this text box using the standard edit keys (CTRL X, CTRL C and CTRL V) or use the build ADD IN function.

Formula Builder
: Type in a constant or select an item from the list. Select an operator (note that item or constant is automatically set). Click on ADD IN to append the current selection to the formula text.

Add In Button
: Appends the selected combination of Tracked Item, Formula or constant and operator to the formula.

Expand Button
: Click on this button to display the Formula Expansion Window. The formula will be expanded to an indented list using expanded item descriptions.

OK Button
: Click on this button to close the Formula window. The formula text will be copied to the Item Setup window and saved when OK is clicked on in that window.

Cancel Button
: Closes the window without copying the formula to the Item Setup window.

Formula Expansion Window

The formula text is displayed in the text box at the top of the window. The expanded formula is listed in the larger scrolling text box. The expanded formula is displayed with levels indented to reflect called formulas. Called formulas are expanded to show each Tracked Item, Formula and constant used. All Tracked Items and Formulas notations are expanded to use full descriptions.

Create dB Calendar Window

This is the first of two windows that are used for entering information to create a new database. This window functions the same for both a SAMPLE and PRODUCTION database. The information provided via this window establishes the database calendar. The highlights of this window are:

Date Range
Enter a from and through year. The maximum number of years allowed is ten..

Workdays
These entries establish work weeks including business days and closed days.

Holidays
Check this to automatically set up the common holidays. For some countries this is disabled if the common holidays are not known by **Track 'n Trend**.

Preference
Daily or monthly can be specified. This will determine the technique used for completeness checking in the calendar.

A/P/S Types
Check all that you want to include.

OK Button
Click on this button to create the database.

Cancel Button
Click on this button to cancel creating a database.

Create dB Items Window

This is the second of two windows that are used for entering information to create a new SAMPLE database.

A SAMPLE database requires that typical values be entered for each A/P/S type that you have included in the database. These typical values are used to generate values for each business day. Creating a SAMPLE database is a good way to learn more about **Track 'n Trend** and to also try models before setting up PRODUCTION databases. The highlights of this window are:

Tracked Items to add...
All of Tracked Items that have been defined are listed for review.

Item Description
Select a predefined description or type in a description.

Type
Select CURRENCY, PERCENTAGE or UNITS.

New Button
Clears the edit area to enter a new item.

Save Button
Adds the new Tracked Item to the list of items for the database.

Remove Button
To remove a Tracked Item from the list to add to the database, click on the item to remove then click on REMOVE.

OK Button
Click on this button to update your database after all items have been defined.

Cancel Button
Click on this button to cancel the adding of any items.

TREND Parameters Window

This window sets up the data to select for the TREND spreadsheet and for making graphs. Combinations of Tracked Items/Formulas and date ranges can be selected. Any number of Tracked Items/Formulas **or** any number of dates can be selected, but not many dates and many items. The first **type** of a selected Tracked Item or Formula will be retrieved as **data set 'A'**. The second type of Tracked Item or Formula will be retrieved as **data set 'B'**. All subsequent Tracked Item or Formula that are selected will be grouped in data set A or B. Once the data is retrieved it can then be used with math functions, producing a third data set (**data set 'C'**, see the TREND SPREADSHEET window for more on this).

The following summarizes this window:

Macro Name
Select a macro name to recreate the section criteria defined by a macro name. Type in a macro name to save selection criteria for future use.

Remove Button
Click on this button to remove a macro definition.

None Button
Click on this button to clear a selected macro.

Spreadsheet Format
Describes the format of the TREND Spreadsheet that will be created from the selection criteria. This information box also will describe problems including no items or dates selected as well as too many combinations.

Reset Choices Button
Clears all choices including a macro name.

Method
Choose the consolidation method for all selected Tracked Items and Formulas.

Select by > Report by
Choose the selection and reporting period. For instance, the entry of WEEKS > DAYS means that data will be selected for a week and displayed as days, i.e. MON., TUE., etc. MONTHS > ITEMS means that data will be selected for a month and result in a single value to be displayed for each item selected.

Date Button
This is activated for RELATIVE selection methods. The relative date periods are based on the current default date. For instance THIS WEEK compared to LAST WEEK is based on the current default date and will include completely different data by just changing the default date.

Tracked Item and Formula Selection
All Tracked Items and Formulas are listed in the combo box for selection. When Tracked Item or Formula is selected it is added to the selection list and removed from the combo box list. Use the arrow keys, or double click on the Tracked Item or Formula.

Formula Button
Display the expanded text for a selected formula.

Date Selection

First choose the **A/P/S Type** for the date period. Then select the date period desired. Use the arrow buttons to select, or remove dates. Selected dates are not removed from the date list in the combo box since dates can be selected with different A/P/S Types.

OK Button

All of the selection criteria must have been made before clicking on OK. Clicking on this will result in selecting the appropriate data and displaying the TREND SPREADSHEET window.

Cancel Button

Use this button to close the window. All selection criteria will be kept in case this window is used later.

TREND Spreadsheet Window

Once selection criteria has been entered in the TREND PARAMETER window and OK is clicked, the appropriate data is selected and will be displayed in this window. Two sets of data may be selected, and a third may be calculated from the **'A' data set** and the **'B' data set**. This window is used to calculate a third set of data and for selecting graph options.

A menu bar offers choices to print all rows or selected rows and move data to the clipboard. Data moved to the clipboard can then be PASTED in other applications.

The following summarizes this window:

(Value Grid)
The grid displays data sets 'A', 'B' and 'C'. Data sets 'A' and 'B' were retrieved based on your selection criteria. Data set 'C' is computed in this window as you direct.

Data Set C is
Select two operands and an operator to CALCULATE **data set 'C'**.

Data
Select the data set to be displayed in the graph.

Title
Default titles are displayed for 'A' and 'B'. Enter your own description as desired.

Graph Type
2D pie, 3D pie, 2D bar, 3D bar, and line formats can be selected.

Style
Choose the style that you would like. The options are based on GRAPH TYPE.

Grid Lines
Applies to 2D bar, 3D bar and line formats.

Compute 'C' Button
The **compute** button is used to calculate a value for the 'C' data set, based on your choices in the **DATA SET C IS** line.

Cumulate/Detail Button
The values in each row initially are displayed as stored in the database (detail). You can use this button to calculate cumulative totals and then revert back to the detail.

Graph Button
Display (or redisplay) a graph based on parameters set in this window.

Cancel Button
Close the GRAPH window (if visible) and this window.

Graph Window

Once data has been selected and graph parameters selected, this window can be displayed. A graph will be displayed based on the selected data values and choices in the graph format. This graph can be changed to a larger size on your screen, and can be enlarged to the full screen size, if desired.

A menu bar is provided in the window to provide a print capability and an option to move the graph image to the clipboard. Use the image on the clipboard to PASTE the image in other applications. Monochrome and color options are provided.

Report Parameter Window

Reports can be produced for selected Tracked Items and Formulas (or all). The reports fall into three categories: A Worksheet, a Day Report and Multi-Purpose Reports. The Worksheet can be used for manually collecting values to enter into Track n Trend. The Day Report will list all Tracked Items and Formulas and selected A/P/S values for a given day. The Multi-Purpose Report will list values for selected Tracked Items and Formulas, calendar periods and A/P/S types. When two A/P/S Types are selected the third column will be a variance.

The following summarizes this window:

Report
Select the report type.

Date
The current default date will be displayed initially. A new date can be type in, or use the Date Button.

Date Button
To refer to the calendar and define another default date, click on this button.

A/P/S Types
Choose one, or more, A/P/S Types.

Tracked Items and Formulas to Report
Select one, or more, Tracked Items and Formulas to include in the report. The Worksheet and Day Reports do not require the selection of Tracked Items and Formulas, as all items are included in these reports.

All Button
Select all Tracked Items and Formulas for the report.

None Button
Clear the selection of all items. No items are selected.

Formula Button
Display the expanded text for the selected formula item.

OK Button
All of the selection criteria must have been made before clicking on OK. Clicking on this will result in selecting the appropriate data and printing the report.

Cancel Button
Use this button to close the window.

Calendar and Notes Window

The calendar and Notes window can be used view actual calendars so that dates can be seen in perspective. The last date selected in this window appears at the bottom of the main window and is the current default date. The current default date is used as the initial date for display and report parameters and for relative dates in the TREND function.

Notes can be entered for any day and when a note exists the day is underlined in the calendar. The note displayed always pertains to the selected day in the calendar.

The following summarizes this window:

Calendar
The calendar is color coded. See the legend window for more on the colors and codes used. Use the date button to change a date or click on any day in the month displayed. The current date is shown in the button and is displayed in italics.

Date Button
Click on the button with the date displayed to type in another date. The valid range of dates will be displayed when prompted for a new date.

<<   <   Today   >   >>
Use the date navigation buttons to move the current date. The double arrows move one year at a time, the single arrows move one month at a time. Use the Today button to set the calendar to todays date.

Legend Button
Click on this button to display a legend of the colors and codes used in the calendar.

Codes/Color Button
This button will change colors to codes and vice-versa. See the legend window for more details.

Note for the Day
The text area is used for the note. If the text area is blank then no note exists for the date. Key in new text or edit text to create a note for the day. Delete all of the text to remove a note.

Save Button
Use the Save Button to save a note or delete it if the text has been deleted.

Completeness Check
Choose the A/P/S Type to check. Once an A/P/S Type has been selected the values for that type will be checked for the selected month. The calendar colors, or coding, will be updated to reflect the status of the A/P/S Type selected. This provides a fast way of determining the completeness of data values.

Close Button
Close the calendar window. If note text updating is pending it will be completed before closing the window.

Cancel Button
Use this button to close the window without updating notes.

Calendar Legend Window

This window describes the color coding and the codes used in the calendar window.

TRACK Parameters Window

This window appears before the TRACK Spreadsheet so that the spreadsheet values can be qualified. Select the choice of Daily or Monthly and the desired A/P/S Type for the spreadsheet.

The following summarizes this window:

Daily or Monthly
: Select the period for the spreadsheet cells. Daily displays each day in a cell for the selected month. Monthly displays each month in a cell for the year selected.

Date
: The current default date will be displayed initially. A new date can be type in, or use the Date Button.

Date Button
: To refer to the calendar and define another default date, click on this button.

A/P/S Types
: Choose one, or more, A/P/S Types.

Items to Report
: Select one, or more, Tracked Items and Formulas to include in the report. The Worksheet and Day Reports do not require the selection of Tracked Items and Formulas, as all items are included in these reports.

All Button
: Select all Tracked Items and Formulas for the report.

None Button
: Clear the selection of all Tracked Items and Formulas. No Tracked Items and Formulas are selected.

OK Button
: All of the selection criteria must have been made before clicking on OK. Clicking on this will result in selecting the appropriate data and printing the report.

Cancel Button
: Use this button to close the window.

TRACK Spreadsheet Window

Use this window to display daily or monthly values for Tracked Items. Additionally data can be imported and exported, via the clipboard, by using cut and paste. New Tracked Items can be defined and current descriptions can be edited. All values entered are kept as daily values. When monthly values are entered the value is prorated to the business days of the month.

Note: Formulas are never displayed in the TRACK Window since values cannot be entered for Formulas.

Tracked Items can be added by typing into the last line in the spreadsheet - a new blank line will be added once its used. Descriptions can be changed in the spreadsheet. Use the spreadsheet to enter values. Monthly values are prorated to the business days in the month. Import and export data via the clipboard. Before the spreadsheet can be saved, all rows that have been added (either by typing them in or importing data) must be resolved via the New Row Options Window.

Note that the selected A/P/S type is displayed at the top left corner of the window. The shadow of the cell location box is green when no changes have been made and red when changes have been made.

The following summarizes this window:

File / Save
: Saves the current descriptions and values.

File Print...
: Print setup, print all rows and print selected rows are provided.

Edit...
: All commonly used edit functions are provided including Undo, Cut, Paste and Select All..

View...
: Review and change the spreadsheets A/P/S type, the daily or monthly mode, or the date selected.

Format...
: Modify the cell widths and freeze or unfreeze the description column.

Row Setup Button
: New rows must be resolved before an update can be accomplished. These rows have been added to the spreadsheet, but do not exist in the database. They are signified by a TYPE of ?.

Save Button
: Use this button to save entries made in the TRACK Spreadsheet. All new rows must be resolved before values can be saved.

New Row Options Window

New rows that typed in, or imported from the clipboard, must be resolved before values in the TRACK Spreadsheet can be saved into the database. This window provides for the resolution of each new row, one at a time. The new row may be added to, or the values moved to, an existing item. The new row may be defined as a new Tracked Item. The new row can be deleted.

The following summarizes this window:

Tracked Item Description
: Copied from the TRACK Spreadsheet - this can be edited as desired.

Create...
: Select this choice to add this new row as a new Tracked Item. The type and default consolidation method must be defined.

Add...
: Select this choice to add the new values to an existing Tracked Item in the spreadsheet. Select the Tracked Item to add values to. The row will be deleted once all of the values have been added.

Move...
: Select this choice to move the new values to an existing Tracked Item in the spreadsheet. Select the Tracked Item to move values to. The row will be deleted once all of the values have been moved.

Delete...
: Select this choice to delete the new row,

OK Button
: Click on OK to act on the choices made. The TRACK Spreadsheet will reflect the changes.

Cancel Button
: Click on cancel to return to the TRACK Spreadsheet without making any changes.

Display Parameters Window

Displays of reports can be produced for selected Tracked Items and Formulas (or all). The displays fall into two categories: A Day Report and Multi-Purpose Displays. The Day Report will display all Tracked Items and Formulas and selected A/P/S values for a given day. The Multi-Purpose Display will list values for selected Tracked Items and Formulas, calendar periods and A/P/S types. When two A/P/S Types are selected the third column will be a variance.

The following summarizes this window:

Display
Select the display type.

Date
The current default date will be displayed initially. A new date can be type in, or use the Date Button.

Date Button
To refer to the calendar and define another default date, click on this button.

A/P/S Types
Choose one, or more, A/P/S Types.

Tracked Items and Formulas to Display
Select one, or more, Tracked Items and Formulas to include in the display. The Day Report does not require the selection of Tracked Items and Formulas, as all Tracked Items and Formulas are included in this display.

All Button
Select all Tracked Items and Formulas for the display.

None Button
Clear the selection of all Tracked Items and Formulas. No Tracked Items and Formulas are selected.

Formula Button
Display the expanded text for a selected formula.

OK Button
All of the selection criteria must have been made before clicking on OK. Clicking on this will result in selecting the appropriate data and displaying the report.

Cancel Button
Use this button to close the window.

Display Report Window

All of the reports are displayed in a grid format in this window. Use the close button to exit the window. The note for a given day is displayed for Day Reports.

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Actual/Planned/Standard

Three types of values may be used in **Track 'n Trend:** Actual, Planned and Standard. Actual data is most often used and represents actual values for each day for each item. Planned data is usually entered in advance for values that are thought to be what the Actual values will be. Standard data is generally values that represent an industry standard.

Average

This is a method for consolidating more than one days values for display or reporting. Each appropriate days values will be added to a total value for a period and item combination When the last item has been added, the total will be divided by the number of values found. Zero values are counted in the divisor.

Business Days

A collective term meaning that values are expected for the day. Business days are considered as days that your business is open. This status for a day affects the color coding in the **Track 'n Trend** calendar, and is used for generating prorated values.

Calendar

A calendar is kept that is defined by you. Business days, holidays and closed days are all defined. Types of data allowed and valid years are established as well. The use of the calendar information is central to the entering, retrieval and display of values.

Closed Days

Closed days are days that are not business days or holidays. When the calendar is set up a standard work week is defined. The days that are not defined as business days are closed days. Values are not expected on closed days, but they are allowed. Prorated values are not applied to closed days.

Compute

This function is available in the SPREADSHEET window and allows for the dynamic creation of a third data set ('C') for selected items from data sets 'A' and 'B'. This feature offers extensive possibilities for discovering hidden data within the data that you entered.

Cumulate/Detail

This function is available in the SPREADSHEET window and allows for the dynamic calculation of cumulating the cells for each row. This button always displays the opposite choice of the current setting of the values in the spreadsheet. In other words: values are initially shown as detail values and the button displays: CUMULATE. Clicking on CUMULATE will cause the cells to be recomputed as cumulative values and the button display will be changed to DETAIL.

Custom Dates

Any standard calendar date range such as a week, month, quarter or year, is automatically available. Custom date ranges can be defined for periods that are not standard calendar periods. This provides a fast way for retrieving data.

Data Set 'A'

One, of possibly two, data sets that can be created via the TREND parameter selection. Data set 'A' will exist as the first data set selected. All items in the data set will match the same type of data in terms of being dollars, units or percentages. Also, the method for handling consolidation will be the same.

Data Set 'B'

One, of possibly two, data sets that can be created via the TREND parameter selection. Data set 'B' will exist only as the second data set selected. All items in the data set must match the same type of data in terms of being dollars, units or percentages. Also, the method for handling consolidation will be the same.

Data Set 'C'

This data set is the result of a calculation using combinations of data sets 'A' and 'B'. This calculation is performed in the TREND SPREADSHEET window. This is a powerful feature of **Track 'n Trend** that will allow you to view data that's hidden within the data actually entered in your database.

Database

Track 'n Trend creates a database using ACCESS 1.1. This is a valuable point, in that the data captured in **Track 'n Trend** can be used for other purposes. With the **Track 'n Trend** database and ACCESS you can create additional reports and access the database from other applications. Moving data into, and out of, the **Track 'n Trend** database is a state of the art process.

Formula

A formula is specified through the definition of a Formula Item. The formula can consist of any valid combination of Tracked Items, Formulas, constants and operators. Formula values are computed at the time that the value is needed and is based on the period of time needed. Formula nesting is limited to eight levels.

Holidays

Holidays is a collective term that means that values are not expected for the day. The day may be a holiday, or it may be a day thats scheduled for inventory, etc. Its a day that is not a business day or a closed day. The description for the day can be used to highlight why its a holiday.

Items

Items are of two types: Tracked Items and Formulas.

Tracked Items: Topics that **Track 'n Trend** uses for keeping details about actual, planned and standard values. Examples of Tracked Items are *units shipped*, *customer calls*, etc.

Formulas can be created that specify combinations of Tracked Items, Formulas and arithmetic operators to calculate values.

LASTFOUND

This is a method for consolidating more than one days values for display or reporting. Each appropriate days value will replace the current value for the selected period, thus the last value found will be the value reported. If no values exist for the selected Tracked Item and date range then the last value found *just before* the selection date range is used. Zero values are included in this process.

Macros

The selection of data for the spreadsheet and graph requires the specification of the items and date ranges. To speed this process for combinations that are used more than once, a macro name can be assigned to the selection criteria. Selecting the macro at a later time selects the data for the items and date periods that were originally defined.

MAX

This is a method for consolidating more than one days values for display or reporting. Each appropriate days value will be compared to the current value and if the new days value is higher, it will replace the current value. Zero values are included in this process.

Method

Method, or consolidation method, determines how many values will be consolidated into a single value. For instance if each daily value will be consolidated into a single value for a month a method will specify how to accomplish this. Five methods are available: **SUM, AVG, MIN, MAX and LASTFOUND**.

MIN

This is a method for consolidating more than one days values for display or reporting. Each appropriate days value will be compared to the current value and if the new days value is lower than the current value, it will replace the current value. Zero values are included in this process.

Notes

Provision has been made to allow for a note for each day. This is useful for noting exceptions that could influence a particular day in a positive or negative way. Notes can be up to 255 characters. Notes are entered and reviewed in the CALENDAR window.

Prorated Value

A prorated value is a way to enter values by month, yet maintain daily values. The TRACK Spreadsheet will prorate all values to the business days when a monthly spreadsheet is used. The total value is divided by the business days in the month selected and that amount is entered for each business day. Any balance is included in the last days value.

Relative Dates

A frequently used way of comparing data is to compare this month to last month, etc. For this reason a relative date capability has been included in **Track 'n Trend**. This is used when selecting data for the spreadsheet and for graphing. The relative dates are based on the date that has been selected in the calendar in the MAIN window.

It is very useful to define a macro that selects data based on relative dates. Quick access to different periods can then be reviewed by selecting a date in the calendar of the MAIN window, and then selecting the macro.

Selection>Reporting

There are two considerations for selecting data for date ranges: (1) how to retrieve the values, and (2) how to report the values. For instance: select values for a week and display the values for each day ***or*** select values for a quarter and display the values for each week. The selection of values includes calendar periods, custom date ranges and relative date ranges. The reporting periods include days, weeks, months, quarters and years. No reporting period can exceed 31 reporting periods, as the graph is limited (by design) to 31 data points.

Short Description

A short description is required when displaying a graph for two, or more, Tracked Items and Formulas for a single period of time. In this format, the graph shows the Tracked Items and Formulas as data points and a short description is necessary. A short description is automatically created when a new Tracked Item or Formula is defined. This generated sequential letter description can be replaced with any value that is preferred.

SUM

This is a method for consolidating more than one days values for display or reporting purposes. Each appropriate days value will be added to a total value for the period selected.

TRACK

The aspect of **Track n Trend** that permits capturing data values for Tracked Items. Data can be imported or exported. Monthly values can be entered and prorated to daily values and daily values can be entered and managed.

TREND

The aspect of **Track n Trend** that permits the review of captured and computed data values. Combinations of Tracked Items/Formulas and periods can be selected. Math can be performed on the retrieved values and graphs can be produced to visually see trend lines.

Type

Type is either CURRENCY ($), PERCENTAGE (%) or UNITS (,). for each item and formula. The type influences the precision of the number: Currency is stored with two decimal places ($12.50), Percentages with four places (25% = 25.0000), and units with no decimal places.