



# Haccpac eziTracker Interface User Manual

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# Haccpac – eziTracker Interface

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## How the interface works

- The Haccpac eziTracker Server application:
  - Checks for new eziTracker transaction and loads them into the Haccpac database for matching at set time intervals.
  - Synchronises the Workers in Haccpac with the Workers in eziTracker at set time intervals.
  - Synchronises the Clients in Haccpac with the Clients in eziTracker at set time intervals.
- The Haccpac eziTracker client application:
  - Allows you to select a worker for matching.
  - Reads the Worker's eziTracker data and compares the information with the weekly timesheets in Haccpac.
  - Asks you to intervene whenever it is unclear what happened.
- If the eziTracker transaction details match a job in the weekly timesheet you will not need to enter anything about this job – the worker did what they were supposed to do.
- After all exceptions have been handled, just click Save and a weekly timesheet is created in Haccpac.

## Installation of the Haccpac eziTracker Interface

1. Run the SQL query ezitracker\_alter\_haccwin\_db.sql to update the database.

The following tables are added:

- EziTracker\_Lines
- EziTracker\_ExtraLines
- EziTracker\_DefaultValues
- EziTracker\_ErrorCodes
- EziTracker\_WorkCodes
- EziTracker\_ActionValues

The following tables are modified:

- Worker – ET\_Pin and ET\_ManagerRef fields are added
- Clients\_Main – ET\_ManagerRef field is added

2. Run the Haccpac-eziTracker Service set-up file on the Server.

- This file installs the Haccpac-eziTracker Service which constantly checks for new eziTracker transactions and also synchronises the Haccpac client and worker records with the records in eziTracker.

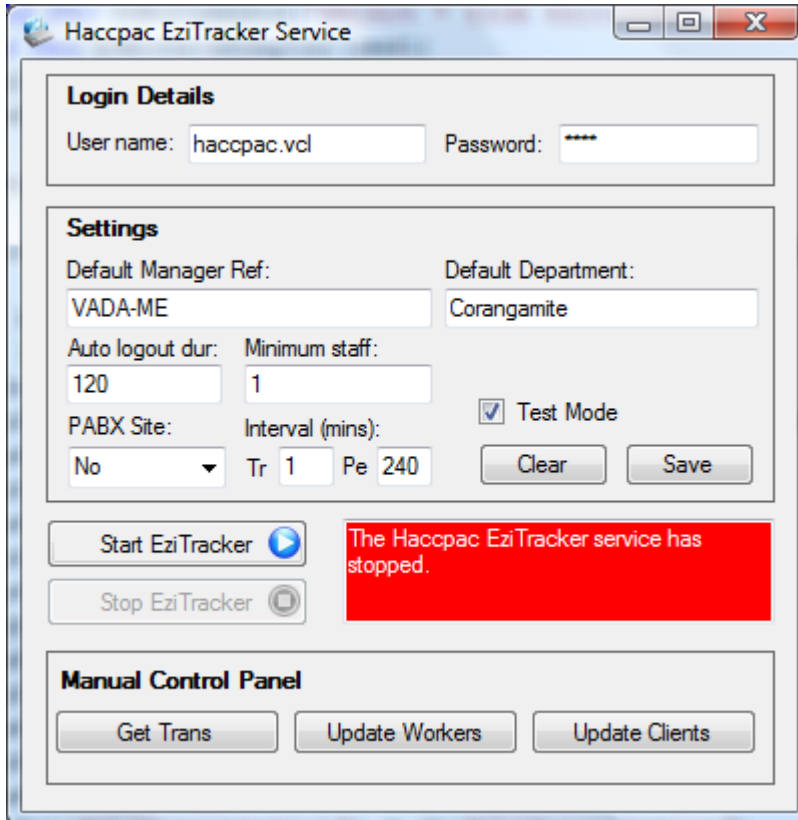
3. Open the Haccpac-eziTracker Service on the Server.

4. Test the Haccpac-eziTracker Service.

- i. Enter the following details into the Haccpac-eziTracker Service Settings screen:

Item	Test Data	Comments
Username	Haccpac.vcl	eziTracker system username
Password	Vada	eziTracker system password
Default Manager Ref	VADA-ME	Manager reference
Default Department	CORANGAMITE	Department (Team)
Auto Logout	120	Time after which the worker is automatically logged out (minutes)
Minimum staff	1	Minimum staff number
PABX Site	No	Is the site on a PABX telephone system
Interval (mins) – TR	10	This is the interval in minutes that Haccpac checks for new transactions
Interval (mins) – PE	240	This is the interval in minutes that the Haccpac

		client and worker records are synchronized with eziTracker
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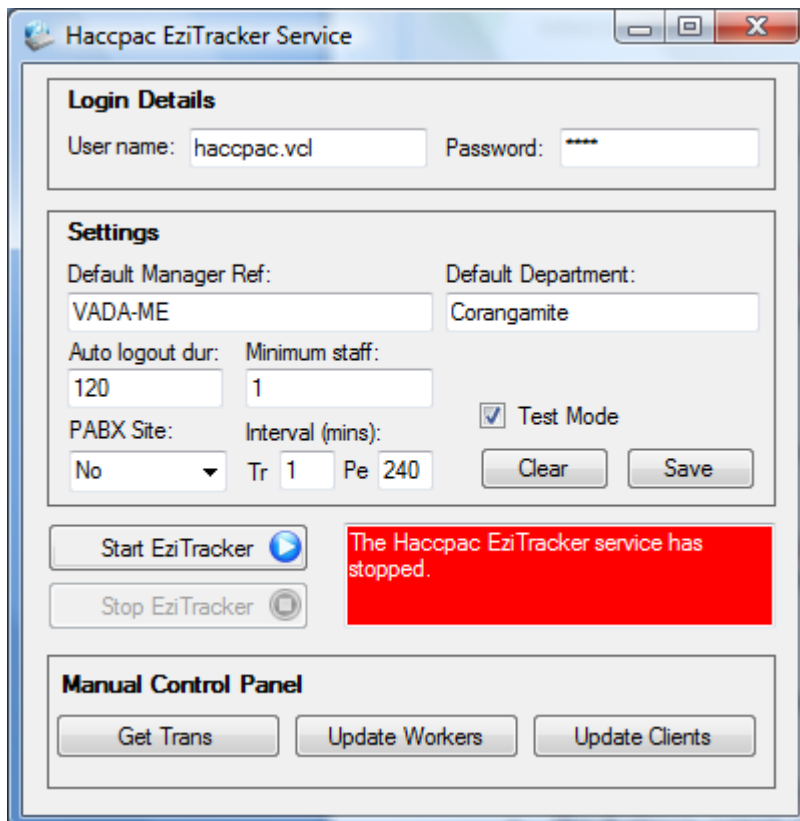
- ii. Click the Save button to **Save** the settings
  - iii. Select the Test Mode check box
  - iv. Click the **Get Trans** button to test the Worker synchronization function – ensure the success message is displayed
  - v. Click the **Update Workers** button to test the Worker synchronization function – ensure the success message is displayed
  - vi. Click the **Update Clients** button to test the Client synchronization function – ensure the success message is displayed
  - vii. Click the **Start Service** button and run for 30 minutes
  - viii. Check the log file in the application directory to ensure the service has run the transaction and extra data update functions
5. Once testing is complete, the details in the Haccpac-eziTracker Service screen can be updated with the production data, i.e. the Username, Password, Default Manager Ref and Default Department. In addition, the Test Mode checkbox should be deselected.

6. Copy the new Workers (Version 7.2.11) and Clients (version 7.2.38) to the Haccpac application directory.
7. Copy the Haccpac-EziTracker client application (Version 7.2.0) to the Haccpac application directory. The Haccpac eziTracker interface is not run from within Haccpac, but by creating a shortcut on your desktop. Create this shortcut in Windows Explorer by dragging HaccEziTracker.exe to the desktop.

## Using the Haccpac-eziTracker Server application

### Settings

- Run Haccpac eziTracker application from **Start >> Vada Computing Pty Ltd.**
- Ensure the settings are correct (see Installation section above).
- Once the settings are correct, click the **Save** button.



**Haccpac EziTracker Service**

**Login Details**

User name: haccpac.vcl Password: \*\*\*\*

**Settings**

Default Manager Ref: VADA-ME Default Department: Corangamite

Auto logout dur: 120 Minimum staff: 1

PABX Site: No Interval (mins): Tr 1 Pe 240  Test Mode

Clear Save

Start EziTracker Stop EziTracker

**Manual Control Panel**

Get Trans Update Workers Update Clients

The Haccpac EziTracker service has stopped.


### **Synchronise Workers and Clients**

- If running for the first time, click Update Workers to synchronise Workers with eziTracker.
- If running for the first time, click Update Clients to synchronise Clients with eziTracker.

### **Minimise the screen to the system toolbox**

- To minimise the screen to the system toolbox (bottom right-hand corner of the screen), right-click anywhere on the screen and select **Hide**.

### **Maximise the screen from the system toolbox**

- To maximise the screen from the system toolbox, double-click the Haccpac eziTracker icon - 

### **Start the Haccpac EziTracker service**

- Click Start eziTracker to start the service

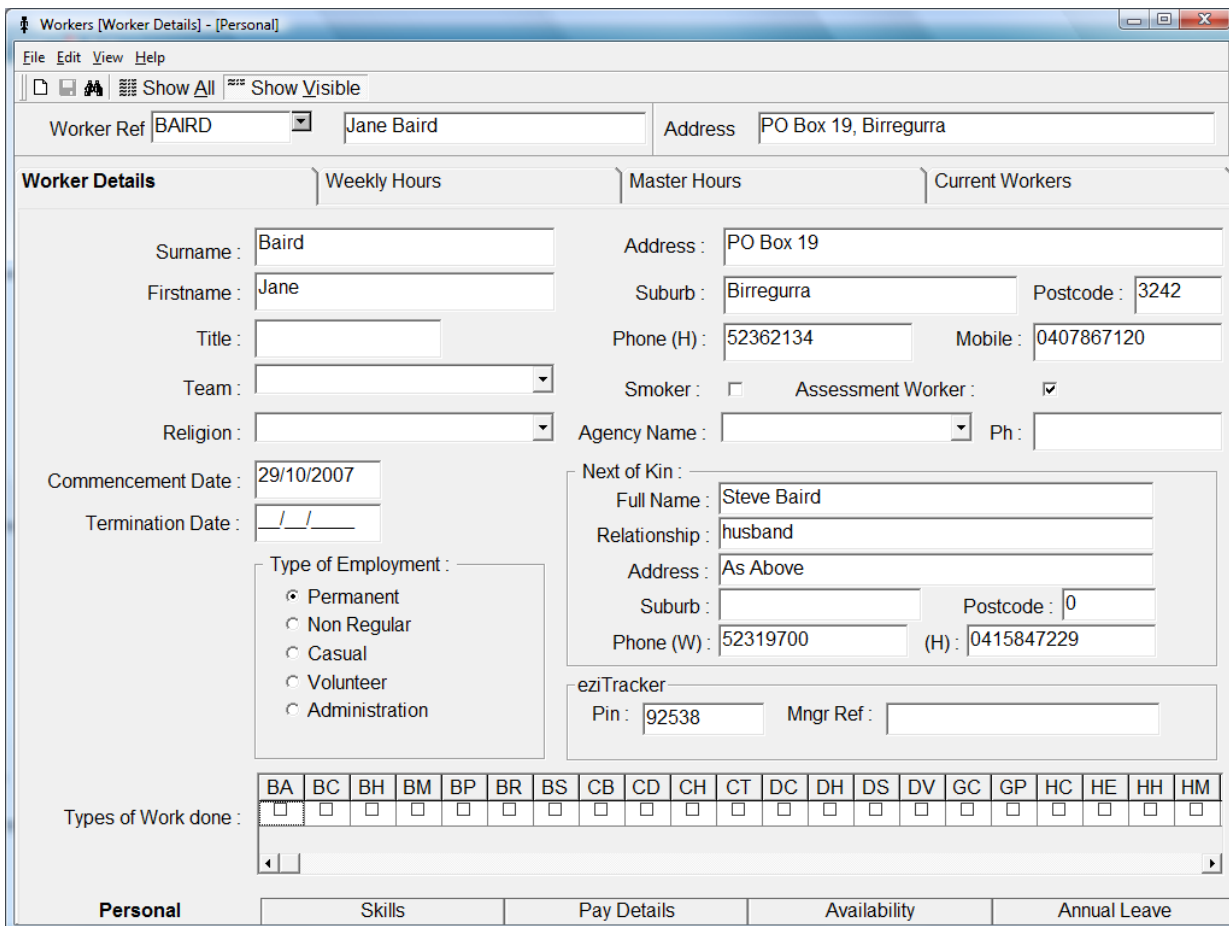
## **Using the Haccpac-eziTracker Client application**

- Run the Haccpac eziTracker interface from the shortcut on your desktop.
- The Settings screen is used to enter the Haccpac eziTracker interface Values, such as eziTracker/ timesheet settings and Travel rates and codes

## Setting up Worker Information

Worker information relating to eziTracker is entered through the Workers module:

- Open the Workers module.
- Select the Personal tab.
- **Pin** – the Pin has been allocated automatically. This will not need to be changed.
- **Mngr Ref** – the Manager Reference can be entered, if necessary.
- Click the Save button to save any changes.



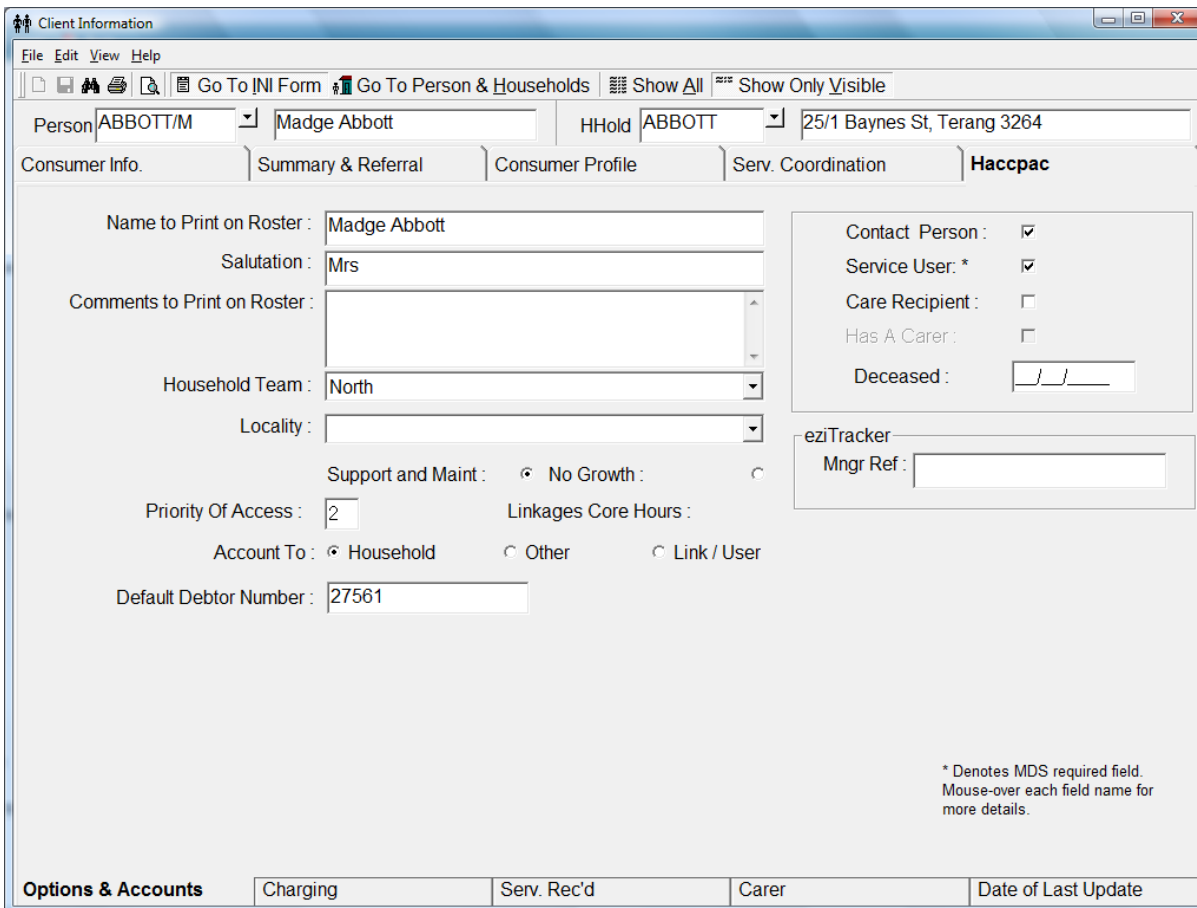
The screenshot shows a software window titled "Workers [Worker Details] - [Personal]". The window contains a form for entering worker details. At the top, there are fields for "Worker Ref" (BAIRD), "Jane Baird", and "Address" (PO Box 19, Birregurra). Below this, there are tabs for "Worker Details", "Weekly Hours", "Master Hours", and "Current Workers". The "Worker Details" tab is active, showing fields for Surname (Baird), Firstname (Jane), Title, Team, Religion, Commencement Date (29/10/2007), Termination Date, and Type of Employment (Permanent, Non Regular, Casual, Volunteer, Administration). There are also fields for Address (PO Box 19), Suburb (Birregurra), Postcode (3242), Phone (H) (52362134), Mobile (0407867120), Smoker, Assessment Worker (checked), Agency Name, and Ph. A "Next of Kin" section includes fields for Full Name (Steve Baird), Relationship (husband), Address (As Above), Suburb, Postcode (0), Phone (W) (52319700), and Phone (H) (0415847229). An "eziTracker" section has fields for Pin (92538) and Mngr Ref. At the bottom, there is a "Types of Work done" section with a grid of checkboxes for various work types (BA, BC, BH, BM, BP, BR, BS, CB, CD, CH, CT, DC, DH, DS, DV, GC, GP, HC, HE, HH, HM). The "Personal" tab is selected at the bottom of the window.



## Setting up Client Information

Client information relating to eziTracker is entered through the Clients module

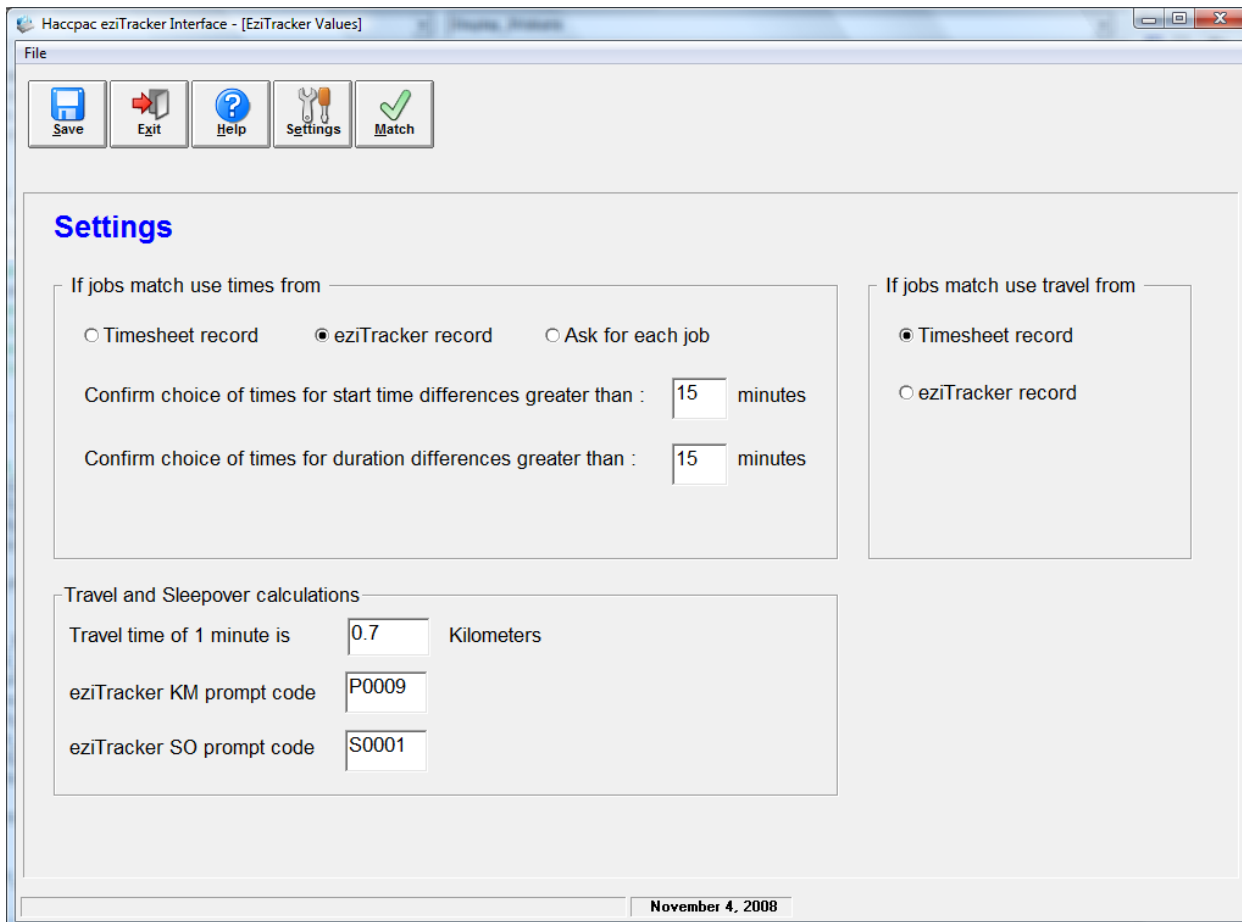
- Open the Clients module.
- Select the Haccpac tab.
- **Mngr Ref** – the Manager Reference can be entered, if necessary.
- Click the Save button to save any changes.



The screenshot shows the 'Client Information' window with the 'Haccpac' tab selected. The interface includes a menu bar (File, Edit, View, Help), a toolbar with icons for file operations and navigation, and a main data entry area. At the top, there are fields for 'Person' (ABBOTT/M), 'Madge Abbott', 'HHold' (ABBOTT), and '25/1 Baynes St, Terang 3264'. Below this are several tabs: 'Consumer Info.', 'Summary & Referral', 'Consumer Profile', 'Serv. Coordination', and 'Haccpac'. The 'Haccpac' tab contains various input fields and checkboxes. On the left, there are fields for 'Name to Print on Roster' (Madge Abbott), 'Salutation' (Mrs), 'Comments to Print on Roster', 'Household Team' (North), 'Locality', 'Priority Of Access' (2), 'Account To' (Household), and 'Default Debtor Number' (27561). On the right, there are checkboxes for 'Contact Person' (checked), 'Service User' (checked), 'Care Recipient' (unchecked), and 'Has A Carer' (unchecked), along with a 'Deceased' field. Below these is an 'eziTracker' section with a 'Mngr Ref' field. A legend at the bottom right states: '\* Denotes MDS required field. Mouse-over each field name for more details.' At the bottom of the window, there are five tabs: 'Options & Accounts', 'Charging', 'Serv. Rec'd', 'Carer', and 'Date of Last Update'.

## Enter the Haccpac eziTracker Settings

- The Settings screen is used to enter:
  - eziTracker/ timesheet settings
  - Travel prompt codes and rates



- **If jobs match use times from:** If jobs match, you can select to automatically use times from the weekly timesheet, eziTracker or a custom time.
- **Confirm choice of times for start time differences...:** This is used to identify jobs which were not carried out close to the rostered start times. The worker might have worked for the full hour rostered, but been 15 minutes late. You may want to be alerted to this situation.
- **Confirm choice of times for duration differences...:** This is used to check the length of time the worker spent on the job is within the limit you set here. If they should have worked for an hour, but the eziTracker record shows only 40 minutes, you probably want to be alerted to this situation.



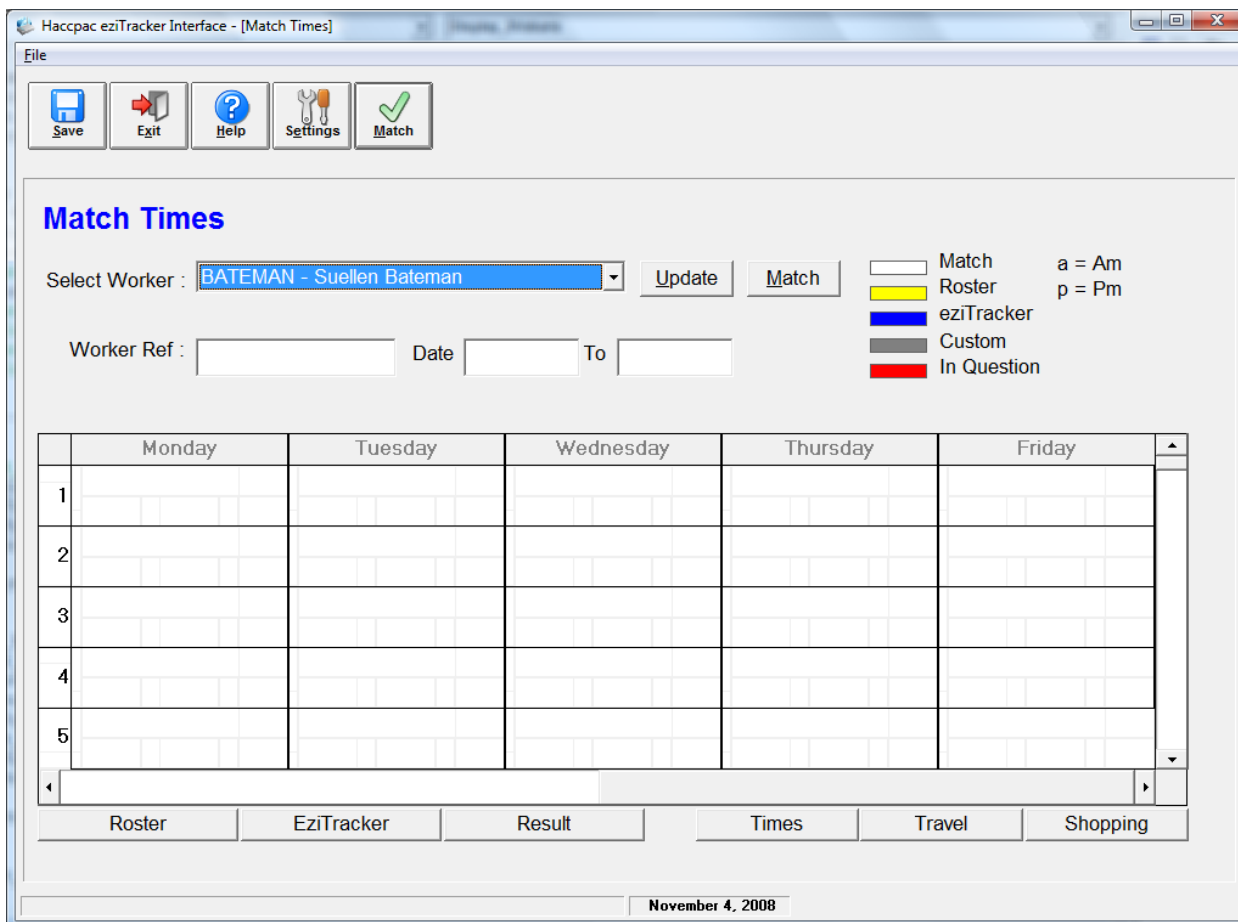
- **Travel/ Sleepover calculations:** This section enables you to enter information about travel and sleepover codes.
  - **Travel time of 1 minute is** - Enter the ratio of travel time to travel distance. For instance, if your workers travel 0.7 of a KM in a minute, then enter 0.7 in the field on the left.
  - **eziTracker KM prompt code** – Enter the travel KM prompt code, e.g. P0009.
  - **eziTracker SO prompt code** – Enter the sleepover prompt code, e.g. S0001.

**Note: If you don't intend to use travel or sleepovers, leave these fields blank.**

- Save your selections. Data from the Settings screen is saved in a file called HaccWin.ini

## Match Times

The Match Times screen is used to match Haccpac timesheet records with eziTracker transactions.



File

Save Exit Help Settings Match

**Match Times**

Select Worker : **BATEMAN - Suellen Bateman** Update Match

Worker Ref :  Date  To

Match      a = Am  
 Roster      p = Pm  
 eziTracker  
 Custom  
 In Question

	Monday	Tuesday	Wednesday	Thursday	Friday
1					
2					
3					
4					
5					

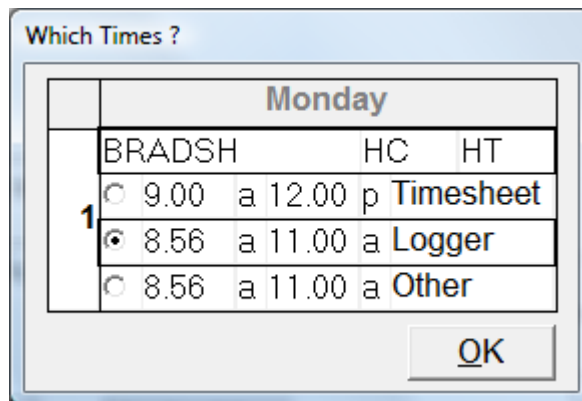
Roster EziTracker Result Times Travel Shopping

November 4, 2008

### Steps to import timesheet data:

1. **Select a Worker** – This list is automatically populated with a list of Workers who have corresponding eziTracker transactions that have not yet been matched. You can also click **Update** alongside the **Select Worker** dropdown to update the list with any Workers that have had transactions uploaded since the Haccpac eziTracker Interface was opened.
2. Click the **Match** button. A CSV file can contain data for several weeks. Clicking Open displays the dates of each week for which there is data. Select the week you want to process.

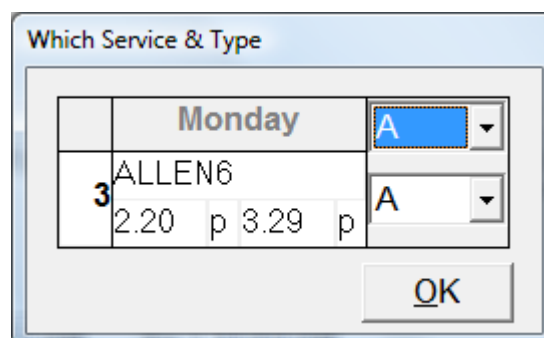
3. Data for the selected week will be displayed in the timesheet table. The columns are the days and the rows contain each job.
  - There is a colour band alongside each job that tells you whether the eziTracker job matches the job in the weekly timesheet in Haccpac. There is a legend on the screen to help you remember what each colour means.
  - There are tabs along the bottom which are used, for example, to look at the jobs stored in the roster (if you press the roster tab), eziTracker (if you press the eziTracker tab) and so on.
  
4. If the times in eziTracker are outside the tolerance set in the Settings screen for a particular job, the following dialog box is displayed:



This dialog box enables you to select the time from the weekly timesheet, eziTracker or enter a different (custom) time.

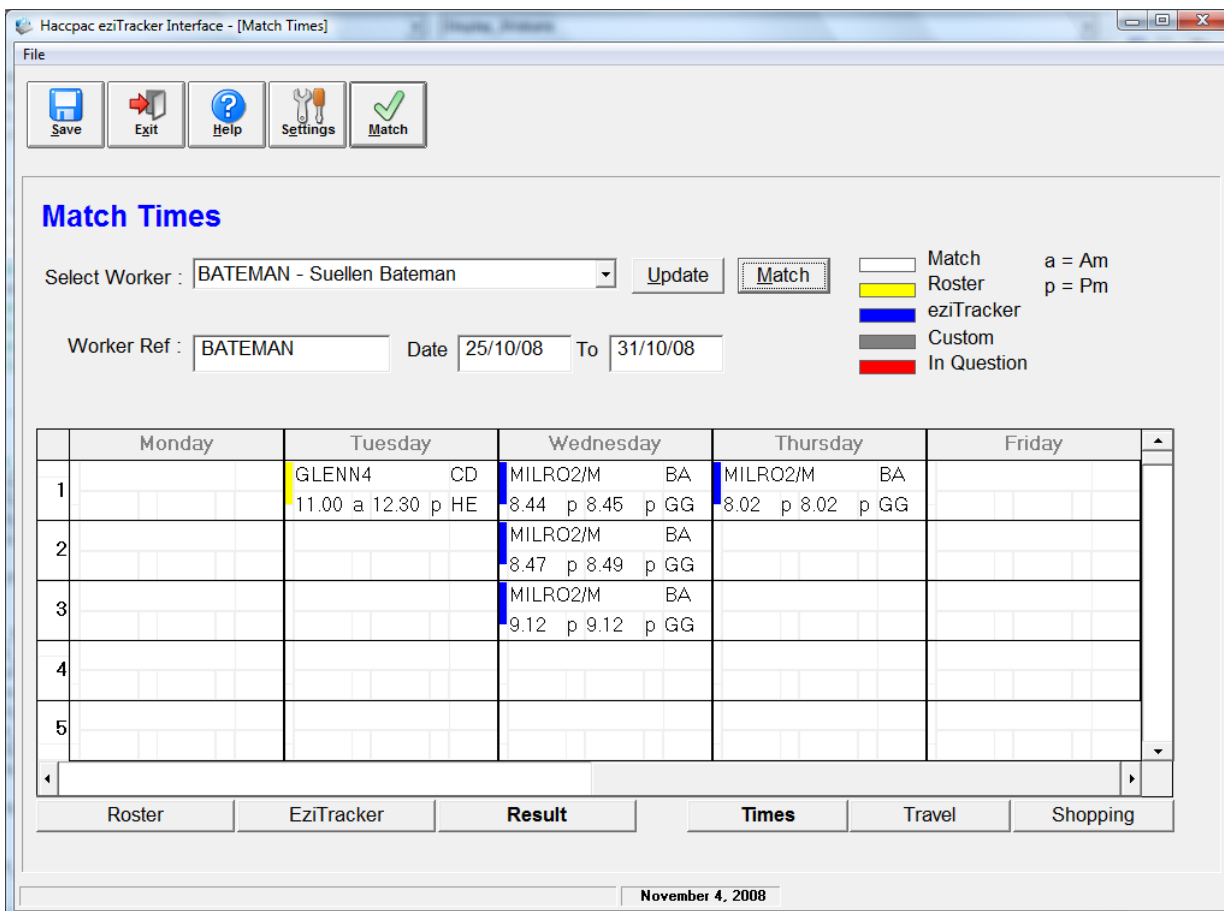
**Note – the job which is shown in the pop up window is identified with a red colour band.**

5. If the job from eziTracker does not exist at all on the weekly timesheet, the following dialog box is displayed:



This dialog box will always default to the first Service Code and Task Type in your Values list. You will need to select a **Service Code** and **Task Type** for the job in this window.

- If the job does not exist in eziTracker but does exist on the weekly timesheet, it will be identified with a yellow colour band. This will alert that the worker either did not attend this client, or they did not use eziTracker when the service was provided. This entry can then be deleted (by right-clicking on the entry) or modified, based on the action taken by the worker.



**Match Times**

Select Worker : BATEMAN - Suellen Bateman    Update    Match

Worker Ref : BATEMAN    Date 25/10/08    To 31/10/08

Legend:  
 Match (white)  
 Roster (yellow)  
 eziTracker (blue)  
 Custom (grey)  
 In Question (red)  
 a = Am  
 p = Pm

	Monday	Tuesday	Wednesday	Thursday	Friday
1		GLENN4 CD 11.00 a 12.30 p HE	MILRO2/M BA 8.44 p 8.45 p GG	MILRO2/M BA 8.02 p 8.02 p GG	
2			MILRO2/M BA 8.47 p 8.49 p GG		
3			MILRO2/M BA 9.12 p 9.12 p GG		
4					
5					

Tabs: Roster    EziTracker    **Result**    Times    Travel    Shopping

November 4, 2008

- After you are happy with the changes click the **Save** button. This will save the changes to the Haccpac roster for the selected worker.

## Moving Jobs

Jobs relating to the same client can be moved between days, or within the same day. This may be necessary when a worker sees a client on a different day than they are rostered for.

To move a job:

1. Right-click on the job you wish to move.
2. Select **Move Job from here...** from the right-click menu.
3. Right-click on the job to be replaced.

**Note: This must be the same Receiver as that selected in Step 1.**

4. Select **Move [Day] Job [Job no.] to here** from the right-click menu.

## Deleting Jobs

Jobs can be deleted from the timesheet.

To delete a job:

1. Right-click on the job you wish to delete.
2. Select **Delete This Job** from the right-click menu.

## Further assistance:

For further assistance, please contact Vada Computing:

Telephone: 03 9890 5418  
Mobile: 0401 562 095  
Email: [support@vadacomputing.com.au](mailto:support@vadacomputing.com.au)