

System Administrator



CurrentTrack.com

Welcome to CurrentTrack®! We're glad you've joined our community. Over the next few days, you'll begin using CurrentTrack and will quickly realize what an integral role it'll play in your day-to-day routine. A manager of CurrentTrack, you're a primary driver of your agency's experience.

To help familiarize yourself with the system, we've outlined a few features we think will be important to your role as [System Administrator](#).

www.CurrentTrack.net

Agency: _____

User: _____

Password: _____

Enter Personal Information

[Admin](#) — [Edit Employee Information](#)

Change Password

[Admin](#) — [System Administration](#) — [Change My Password](#)

Messages

To view system-generated Messages:

[Dashboard](#) — [\(Unread/Read\) Messages](#) OR 

To Delete system-generated Messages:

[Dashboard](#) — [\(Unread/Read\) Message](#) 

To receive Messages at an outside e-mail address:

[Admin](#) — [Edit Employee Information](#) — [Preferences \[Notifications\]](#)

Employees

To Add an Employee:

[Admin](#) — [Agency Administration](#) — [Add Employee](#) OR  — [Employee](#)

To Manage Employee Permissions:

[Admin](#) — [System Administration](#) — [Manage Permissions](#) OR [Admin](#) — [Agency Administration](#) — [Edit Employees](#)

To Manage Employee Notifications:

[Admin](#) — [System Administration](#) — [Manage Default Notifications](#) OR [Clients & Jobs](#) — [Client](#) — [I Want To: Edit Client Notifications](#)

To remove (or re-activate) an Employee:

[Admin](#) — [Agency Administration](#) — [Edit Employees](#) — [Full Name](#) — [Status \[Gone or Here\]](#)



Clients

To Add a Client:

Admin — Agency Administration — Add Client

To Edit a Client Spec Sheet:

Clients & Jobs — Client — I Want To: Edit Client Spec Sheet

To change a Client's Status:

Clients & Jobs — Client — I Want To: Edit Client Spec Sheet — Client Status [Active or Sleeping]

Jobs

To open a new Job:

Clients & Jobs — Client — I Want To: Add Job for This Client

To delete a Job:

Clients & Jobs — Client — Job — I Want To: Edit This Job — Applications Options [Delete Entire Job]

To archive a job:

Clients & Jobs — Client — Job — I Want To: Edit This Job — Job Status [Active or Sleeping]

Client Contact Report

To retrieve:

Clients & Jobs — Client — I Want To: View Unfiled Contact Reports

To File:

Clients & Jobs — Client — I Want To: File Client Contact Report

Workback Schedules

To create a Workback Schedule Template:

Admin — System Administration — Manage Workback Templates

To apply a Template:

Clients & Jobs — Client — I Want To: Add Job for This Client OR Clients & Jobs — Client — Job One Sheet — I Want To: Edit This Job

To create/edit a Workback Schedule:

Clients & Jobs — Client — Job — I Want To: Manage Workback Schedule

Tasks and Events

To change a Task's Status:

Clients & Jobs — Client — Job One Sheet — I Want To: Manage Workback Schedule

To delete a Task:

Clients & Jobs — Client — Job One Sheet — I Want To: Manage Workback Schedule

Check the box(es) beside the Task(s), choose Delete Marked Task(s) under Application Options; click Submit.

To view Tasks by job (Workback Schedule):

Clients & Jobs — Client — Job One Sheet

To view Working Tasks by Employee:

Status Reports — I Want To: View Master Task List

To view Working Tasks by Client:

Status Reports — I Want To: View Working Tasks List

To view Completed Tasks:

Status Reports — I Want To: View Completed Tasks

To create a Custom Task List:

Status Reports — I Want To: Create Custom Task List

To add your Task List to your Dashboard:

Dashboard — Edit Tracklets — Task List [current Tracklets] — Submit

To view your Assigned Task List (and Personal To-Do List):

Status Reports OR Dashboard — Task List

To mark a Personal To-Do List item Complete (or to delete):

Status Reports — I Want To: Edit Personal To-Do List

To view Tasks in Calendar format (Daily Calendar default view):

Calendar — I Want To: View [Weekly, Monthly] Calendar

To add an Event to your Calendar:

Calendar — View Monthly Calendar — Add OR Calendar — I Want To: Add an Event

To edit an Event:

Calendar — [click on] Event OR I Want To: View Monthly Calendar — [click on] Event

To view another Employee's Calendar:

Calendar — I Want To: View Employee(s) Calendar

Progress Report, Purchase Order, Other Forms

To create a Document Template:

Admin — System Administration — Manage Document Templates

To submit a document:

Clients & Jobs — Client — Job One Sheet — I Want To: Create [document] OR 

To Edit/Move/View:

Clients & Jobs — Client — Job One Sheet — I Want To: Open Documents Folder — Edit/Move/View [document]

To delete (other than P.O.), Edit and then click Delete

CLIENT INTERFACE

To view posted files (as Employee):

Clients & Jobs — Client — Job One Sheet — I Want To: Open Attachments Folder

To View (as Client):

Go to www.CurrentTrack.net, type in Agency, User Name, Password

Job One Sheet — View

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To View (as Vendor):

Go to www.CurrentTrack.net, type in Agency, User Name, Password

[Job One Sheet — View](#)

Financial Report

[Clients & Jobs — Client — Job One Sheet— I Want To: View Financial Report](#)

Time Sheet and Expense Report

To record your time: [Time & Expenses — \[select date\] — Submit](#) OR 

Time is calculated in decimals, not minutes (e.g. 15 minutes = .25 Hours)

To View your Completed Time Sheet:

[Time & Expenses — View Completed Time Sheet — Date — Submit](#)

To Submit your Expenses: [Time & Expenses — I Want To: Submit my Expenses](#)

To View your Expense Report: [Time & Expenses — I Want To: View my Expenses](#)

To create a blank Time Sheet: [Admin — Agency Administration — Manage Time Sheets](#)

To re-open a completed Time Sheet: [Admin — Agency Administration — Manage Time Sheets](#)

To edit an Employee's Time Sheet: [Admin — Agency Administration — Manage Time Sheets](#)

We encourage you to explore the many features of CurrentTrack and to better familiarize yourself with the system as a whole. If, at any point, you have a question, would like to make a comment or submit a suggestion, simply click  atop all CurrentTrack pages. There's also a detailed Help section containing FAQ, a full-length Reference Manual, Quick Reference, and several other tools, available within the system.

Sincerely,



The CurrentTrack team

help@currenttrack.com

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