TRACKVIA

Getting Started Guide

Contents

Overview

There are a few stages to building out your app and this guide has been designed to help cover the basics of app building using TrackVia. Because this serves as an overview, you may access our online help section for additional assistance or watch how-to demonstrations on the TrackVia You Tube channel. When creating a new app you will have the option to install a pre-built application, build from an existing spreadsheet, or build the app from scratch. For the purposes of this guide, we will outline the most common process of creating an app from an existing spreadsheet.
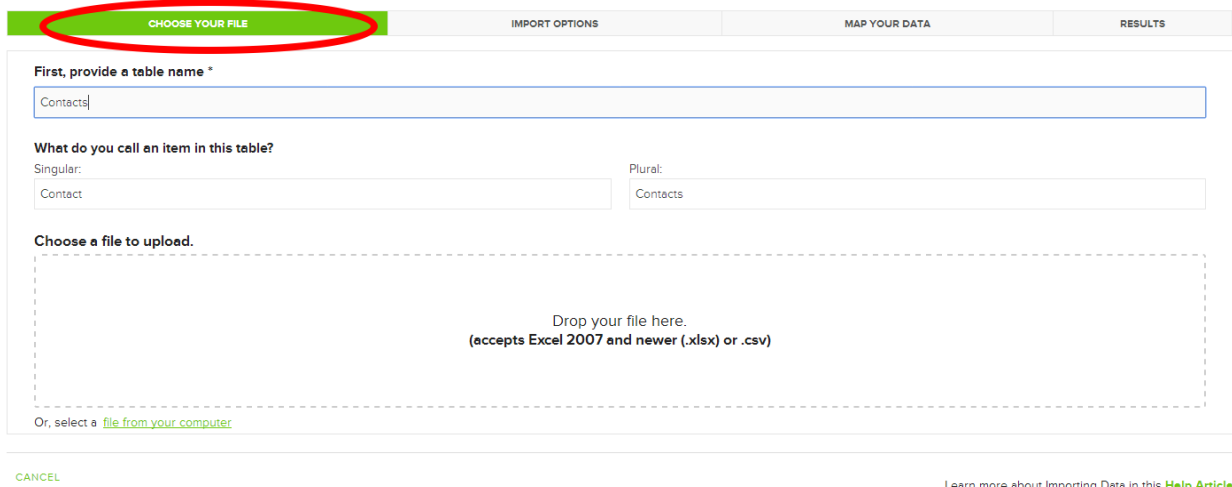
Create an App

Select All Applications from the applications drop down menu, then click **+NEW**.
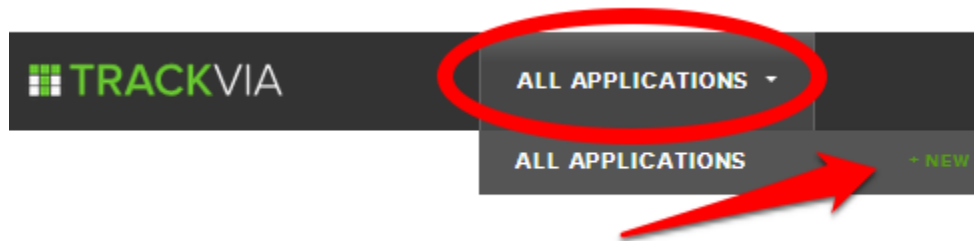
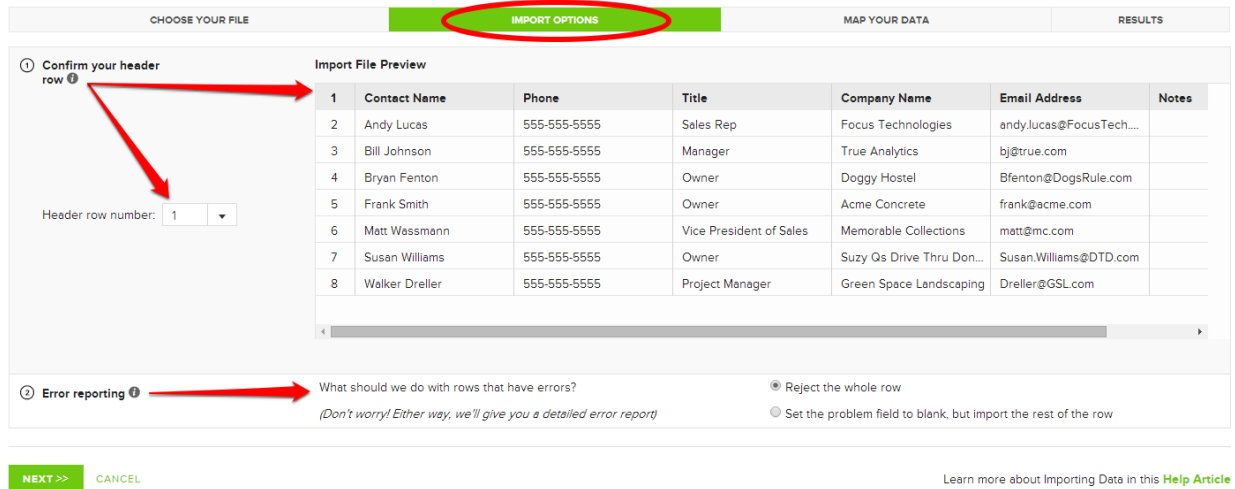From the welcome screen, select Start using an Excel spreadsheet and then name your app.
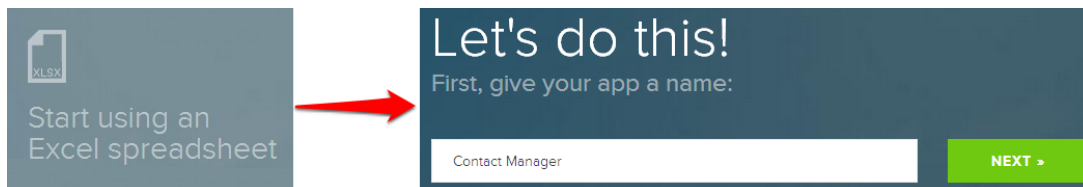
On the next screen, you will name the table, and how you want to label each item. Then you can **Choose Your File** by either dragging and dropping a file from your computer or you can select a file from your computer to import. Be sure to read our helpful hints for importing a spreadsheet here.

Once the file is uploaded, you will be presented with the **Import Options** tab. Here, a preview of your spreadsheet will be displayed as it will appear in TrackVia. First, confirm your header row (tell us which row in your file has your field titles) by viewing or selecting the value found next to the header row number.

Next, tell us how we should handle errors.

- Reject the whole row - Choose this if you want to correct the errors and re-import the whole row.
- Set the problem field to blank, but import the rest of the row - Choose this if a blank field value is okay or if you want to correct the error directly in TrackVia.

Click the **Next** button to get to the **Map Your Data** tab, which allows you to confirm your field names and data types. Choosing the correct data type will allow your app to become a powerful tool. For example, number fields allow you to perform mathematical equations; whereas date fields allow you to create reports with a specified time period.
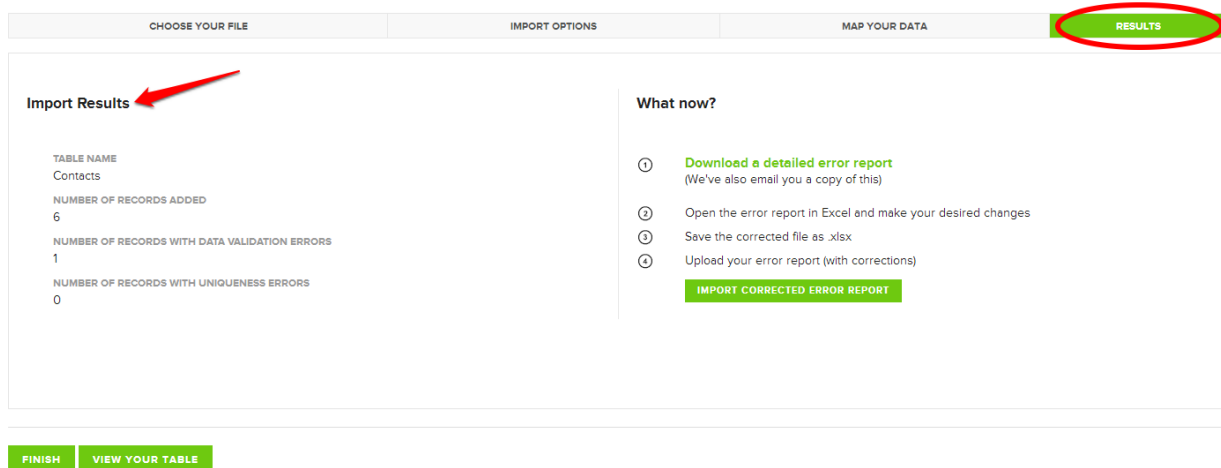
Clicking the **Next** button will complete the import process by creating a new table with the imported data. *Note: You can click the Entertain Me While I Wait button to play a classic game of Snake! If the import is taking an extraordinary amount of time to complete, a message will display stating you will*

receive an email when the import process is complete. At this point, you can safely close the window and work on other tasks while the import finishes.

The **Results** tab is a detailed report that contains how many records were imported and how many records contained errors by providing a detailed report of any errors associated with the import. Additionally, you will receive an email containing these results. In the cases where errors are detected, you can make corrections on the report that was emailed to you, and proceed through importing again by clicking on **Import Corrected Error Report**.

CHOOSE YOUR FILE	IMPORT OPTIONS	MAP YOUR DATA	RESULTS

Import Results

TABLE NAME
Contacts

NUMBER OF RECORDS ADDED
6

NUMBER OF RECORDS WITH DATA VALIDATION ERRORS
1

NUMBER OF RECORDS WITH UNIQUENESS ERRORS
0

What now?

① **Download a detailed error report**
(We've also email you a copy of this)

② Open the error report in Excel and make your desired changes

③ Save the corrected file as .xlsx

④ Upload your error report (with corrections)

IMPORT CORRECTED ERROR REPORT

FINISH   **VIEW YOUR TABLE**

Once the import has completed, you are able to **View Your Table** or **Finish** to return to the app overview**.**

Add a Table

Now that you have started creating an app, you may have additional data to add. To add another table, click on the Admin icon, then go to Tables, and Create New Table. From here you can choose to create the table From Import by following the previously outlined steps, or you may create a table From Scratch. This time we will create the table from scratch.
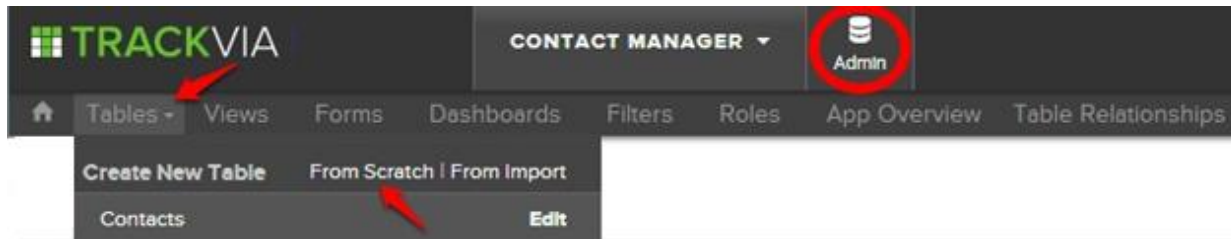
This will take you into the Table Designer where you can define the fields on your new table. From here, you can name your table and define what one item in the table is called.
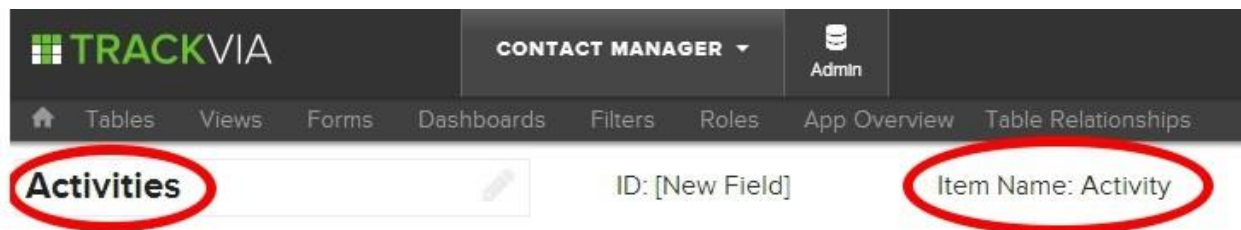
Next, you can begin to add fields to your table. From the column *Add Fields*, simply select the field type you wish to add to your table and drag it into the column labeled *Included Fields*. In the *Field Settings*, you will create the Field Name and define any field choices. *Note: The settings allow you to make a field required, as well as set it as unique*.
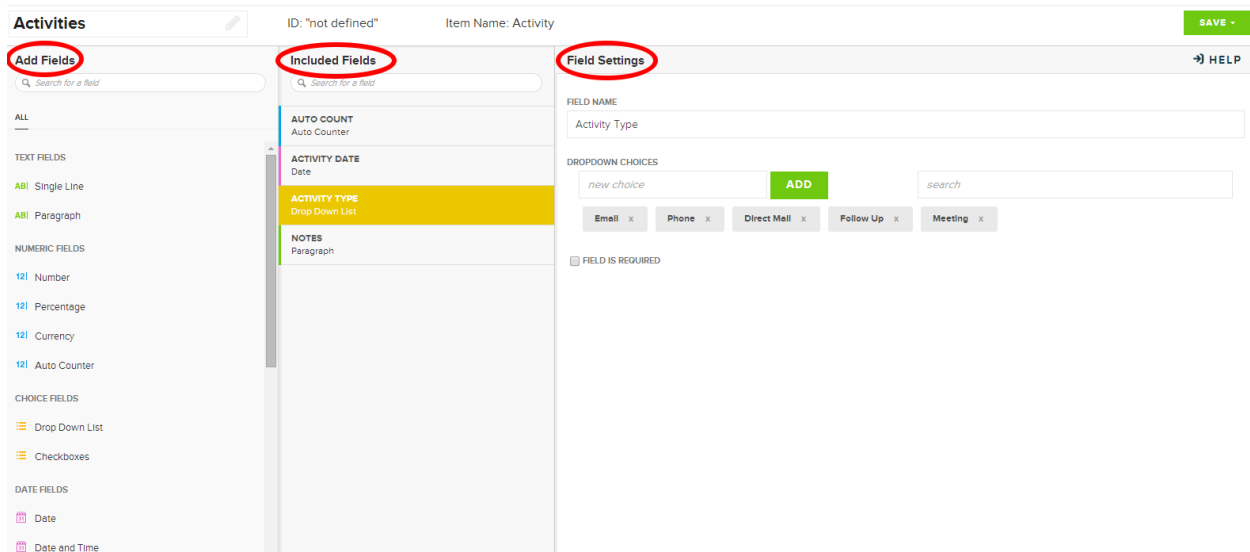
Next, creating an ID is a way to identify a record on the table. To define the ID, simply click into the field, then a box will pop up allowing you to set the ID. In this case, we included static text by clicking on the 'AB' box and adding Activity #. Then we added an auto counter, so each activity ID will be incremental.
Note: The record ID serves as a title for your record. It is what you will click on to open a record and it will be the field referenced when linking tables to one another.
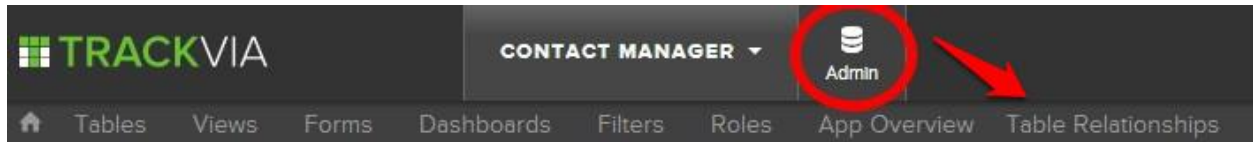

Once you have finished adding fields, you can **Save** the table.

Create Relationships

Now that you have two tables, you can establish a relationship between the tables. To do so select the Admin icon, then Table Relationships.

From Tables Relationships, select the hierarchy symbol to define the relationship. Next, you will be asked to choose the type of relationship, related table name, and determine the relationship name. A relationship name allows you to identify different relationships to the same table, or to other tables in your app. For example, if you are tracking finances, you may want to create one relationship for credits and another for debits. It is important to give the relationship a meaningful name to create an intuitive workflow. This particular example is a one to many relationship, as one contact can have many activities associated with it. In this case we would consider Contacts a parent table and Activities the child table. *Note: A relationship establishes a one to many, or many to many relationship*.
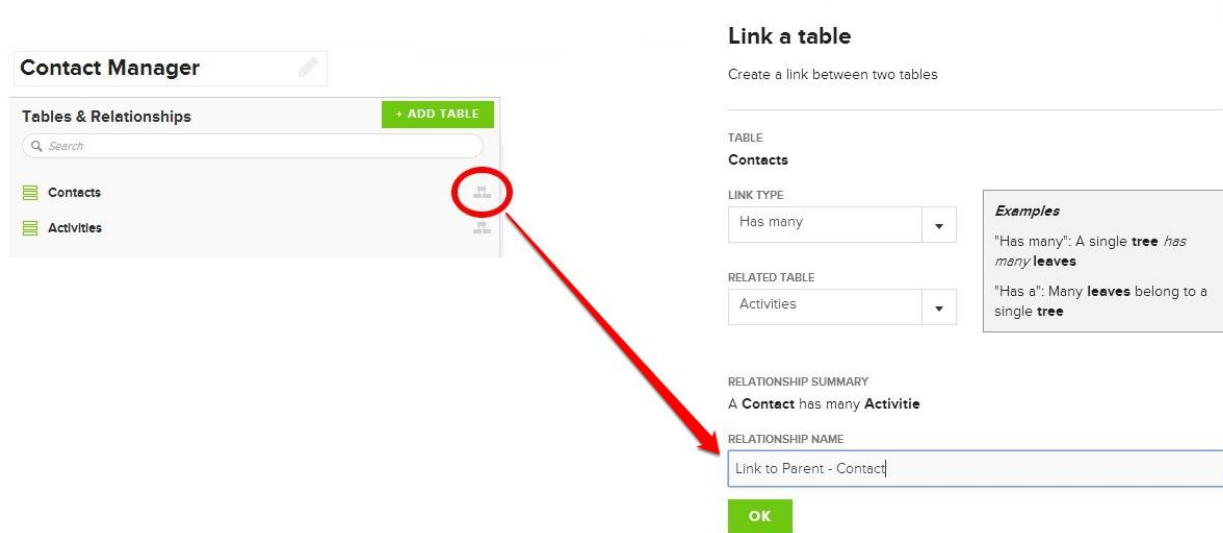
Lastly, **Save** the changes.

Forms

Forms are used for entering information into your application and to view or edit the existing individual records. When you create your first table, TrackVia will automatically construct a 'standard' form that is set to display all fields from your table in a single column. In this section we will show you how to create custom forms with your own layout and colors.

To start, click on the admin icon and navigate to Forms, then select **+ Form** next to the table you wish to add the form to.
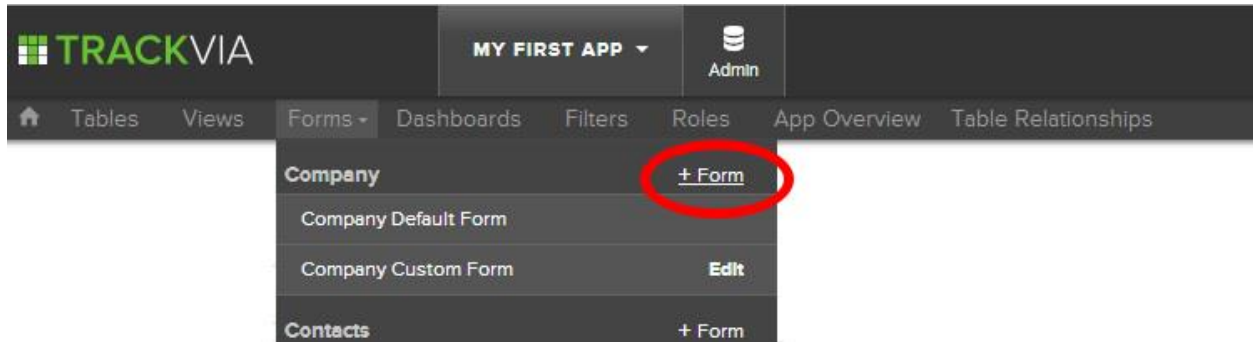
You will then enter the form designer. First, let's give this form a name. Click on 'New Form' to edit the name.
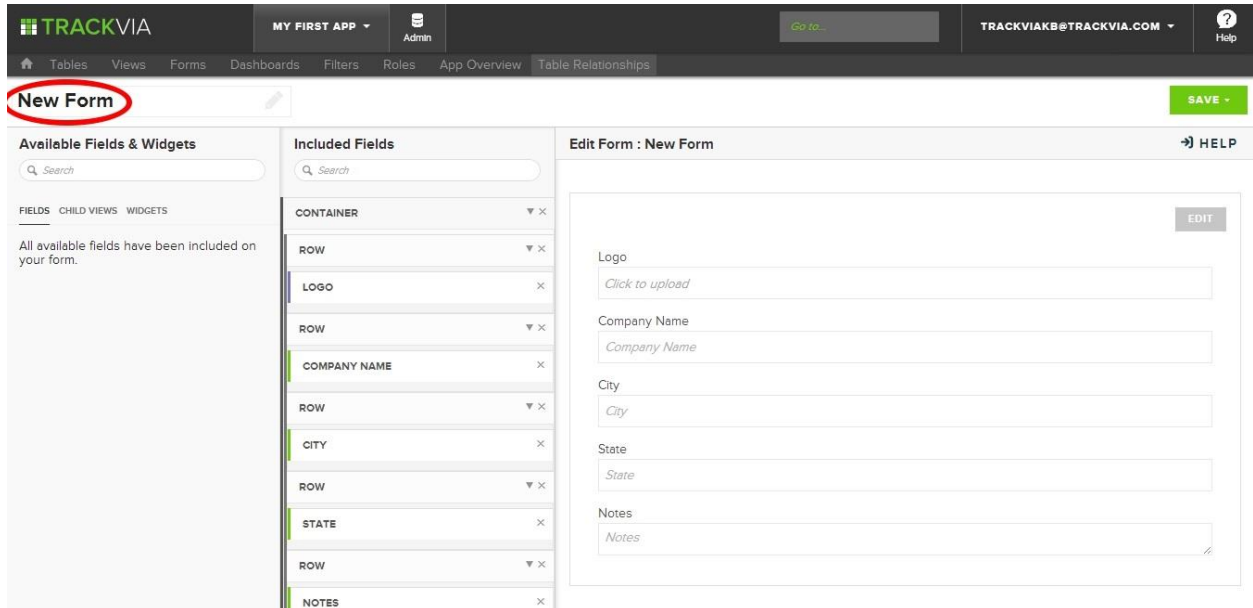
Next, to move fields on a form, you'll need to click and drag field names up and down in the middle 'included fields' column. When you do so, you'll see where the field will be presented on the right in the preview. Accordingly, you can remove fields by clicking the 'x' next to the field name. Lastly, you can insert more than one field to a row to create columns in the form.

Helpful Hint: While you can embed one container into an existing container, if you wish to avoid adding a container within another container, you may need to collapse (click the down arrow next to 'container' in center pane) the container above it. Lastly, to ensure your form saves successfully, you will want to avoid leaving empty rows within a container.

If you would like to add containers, rows or other separators, you will find them under 'widgets' in the list on the left. Drag those into the center column to position them as well. For example, to add a horizontal line, first insert a row to your Included Fields. Then drag the widget into the new row. The line will appear in the preview pane.
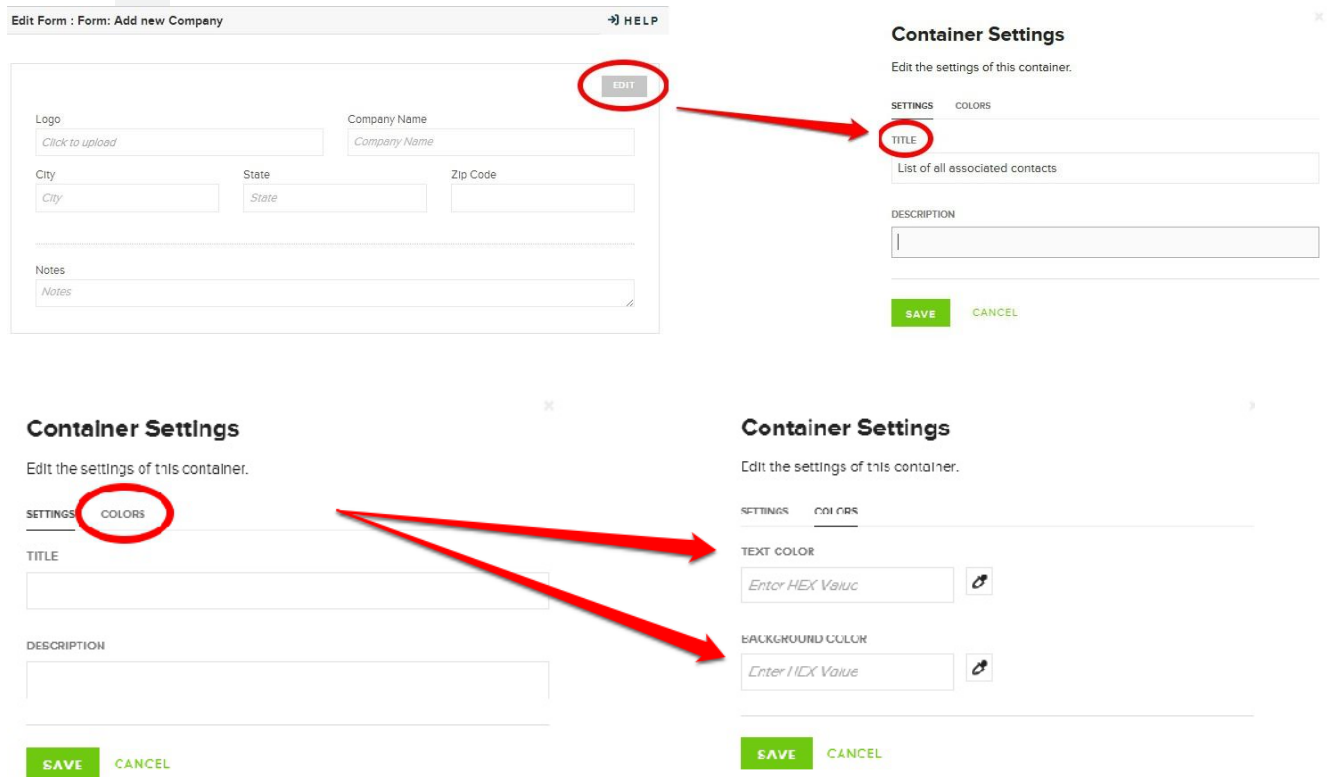
Next, if you wish to further customize your form, click Edit in the preview pane. From here, you can edit the title, font colors, and background colors.

Make sure to click on the **Save** button on the right to save your new form!

Now that you have a form created, you may access the form and enter data into your selected table. From the Forms drop down menu, simply click on your form title to load the form, once it opens you are ready to enter data into your table. Furthermore, you can create a Role which allows you to choose a preferred form for adding or editing records. We will learn more about Roles later. Next, let's focus on creating views for your app.

Create Views

Whether using a system created view or a custom view, there are several tools to help you organize your data the way you see fit. A view allows you to select which data you wish to see from a table. As you build out your application, you'll likely create several views, and you may use them to show different people in different roles different data - but all from the same table.

For example, let's say you wish to print a list of your contacts and their phone numbers, but do not need every field from the Contacts table. For this, you would create a new view. To do so, click the Admin icon, and from the Views drop-down, select **+View** next to the Contacts table.
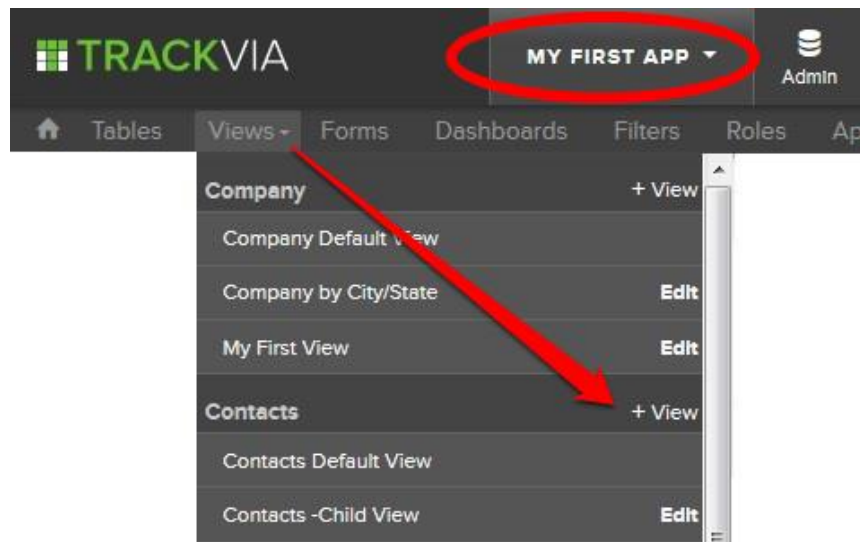
View Name and Description - Above the Fields, Filters, and Format tabs, you will find two fields. The left field allows you to choose the name of the view and the right field allows you to include a description of the view.

Fields - The fields you wish to include in a View. 'Available Fields' shows fields that are not currently in the view, but can be added. 'Included Fields' shows the fields which you will see in the view. You can also select all fields by using the 'Toggle All' button. After one or more fields have been selected, a 'Remove' or 'Add' button will appear at the bottom of the window. This button will allow you remove or add fields to the view. *Note: By default, all fields are included*.

In this case, because we are building the view from the Contacts table, and it is a child of the Company table, you can also include fields from the Company table into your view. From the 'Selected Table' drop down menu, you will see the name of the relationship you created between the tables. When you toggle to the relationship, then any available fields from the Company table are displayed. This allows you to include fields from related tables in one view.

Filters - Filters allow you to customize a view so that only records that meet certain criteria appear in that view. In other words, each filter is a piece of logic related to a specific field's value (greater than, equal to, date ranges, etc.) that ensures only qualifying records make it into the view (See How to create a filter).

VIEW NAME:	DESCRIPTION:
Contacts: Phone List	Export as a spreadsheet for a printer friendly version

FIELDS	FILTERS	FORMAT

Choose a Filter

-- No Filter --   or   BUILD A NEW FILTER

Format - This section allows you to customize how your information is presented. You can create charts, group data, apply calculations, change the order of your fields, and set row heights (see Views & Charts for advanced features).

VIEW NAME:	DESCRIPTION:
Contacts: Phone List	Export as a spreadsheet for printer friendly version.

FIELDS	FILTERS	FORMAT

Apply a calculation to field values? ❶   What calculation do you want to apply?

Select a field to apply a calculation   (Select a field to see calculation options)

Group your results by one or more fields ❶

Select a field to group by

Reorder Your Fields
Drag a field to reorder it.
Click a Field label to change it.

Company Name

Contact Name

Phone Number

Row Height Settings
Specify how many lines of text you would like contained in a row.

LET TRACKVIA SET IT

I'LL SET IT

SAVE & FINISH   CANCEL

Once a view has been created, you will need to click **Save & Finish** at the bottom. You can always edit or change an existing view by clicking on the 'Pencil' icon at the top right of the view.

Create Dashboards

Now that you have a basic app created, you can create a Dashboard to customize the user experience. A dashboard consists of a collection of Views and/or Forms that can be saved and assigned to one or more users to see and use. For most users, this will be their homepage and the primary place for them to interact with the application. By adding everything you and your users need to see to a dashboard, you can make the app easier and faster to use. Multiple Dashboards can be created with any combination of elements from a single App. You can create Dashboards for users to model their workflow and create a positive user experience.
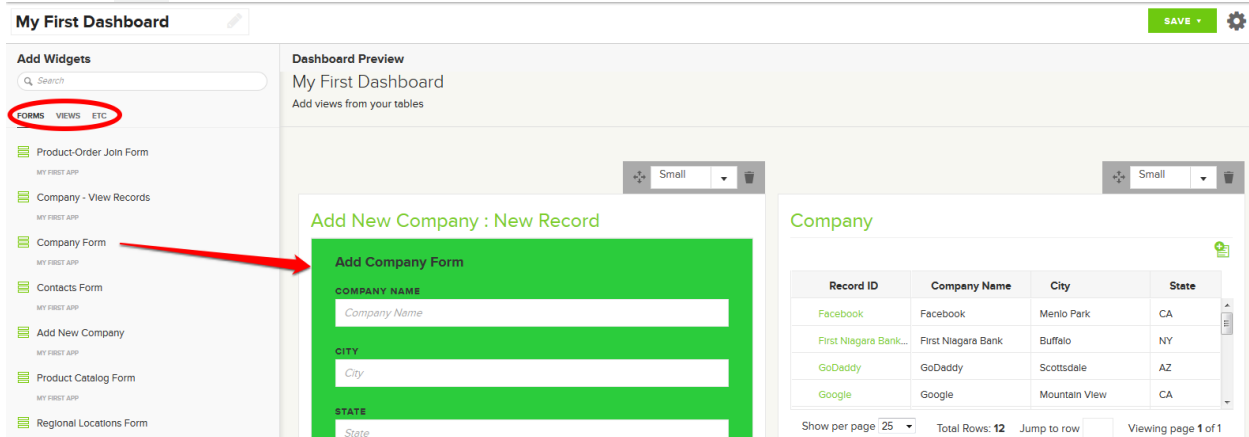
To add a dashboard, click the Admin icon next to your app, and from the Dashboards drop-down, select '**+**' next to Create New Dashboard.
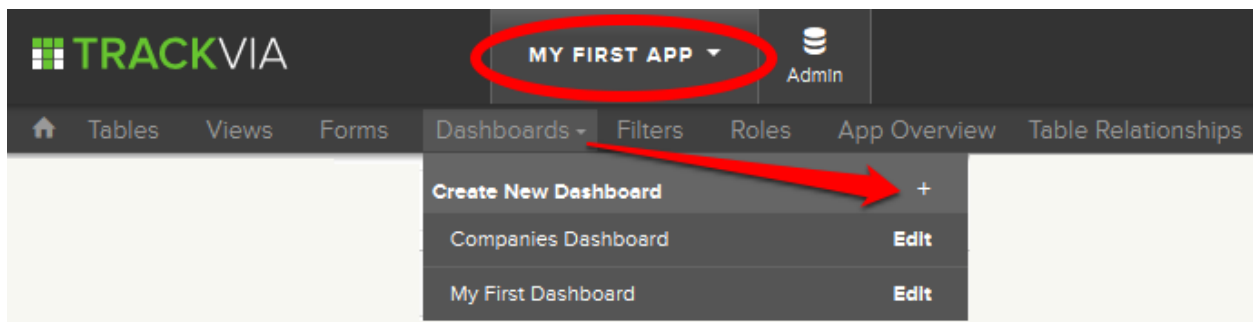
Provide a name for your Dashboard.
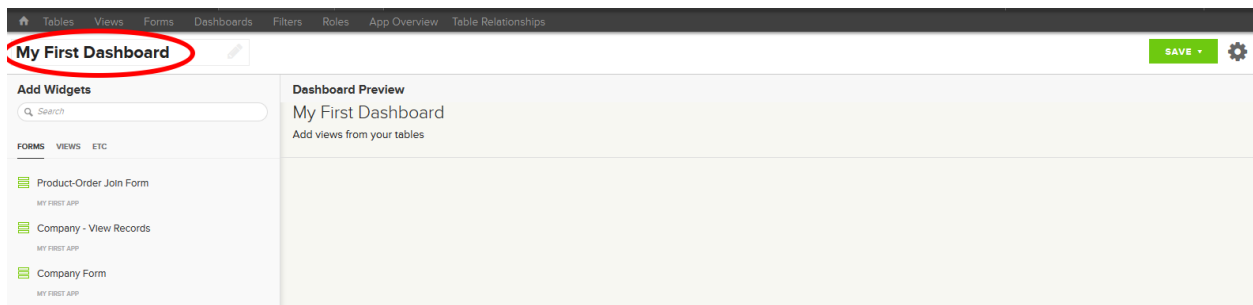
Click on the category of 'widgets' you want to include, then drag the element you want into the preview area on the right.


Once an element is in the preview area, you can adjust the display size, position, or remove it using the control tab at the top of each element.

Once you are finished, simply click the **Save** button.

Create a Role

Roles help you manage permissions in your App. Use Roles to group similar users together and limit access to certain data and deliver custom experiences within an App.

To create a role, navigate to the Admin icon and click '**+**' to add a new role from the Roles drop-down menu.
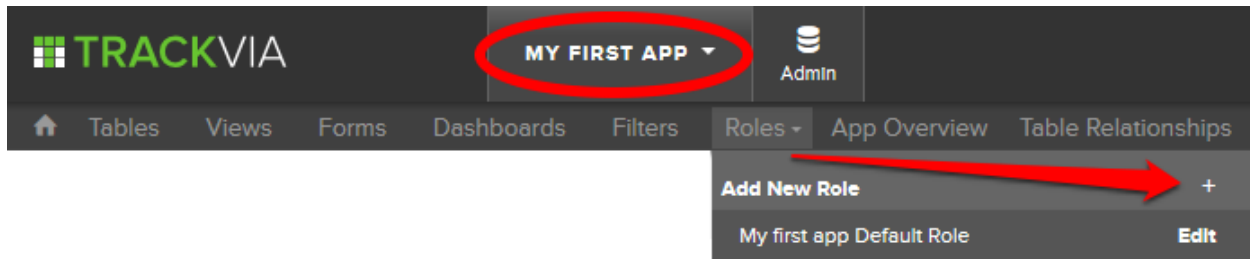
The first step is to give the role a name by clicking the text, 'New Role', in the top left corner of the page.
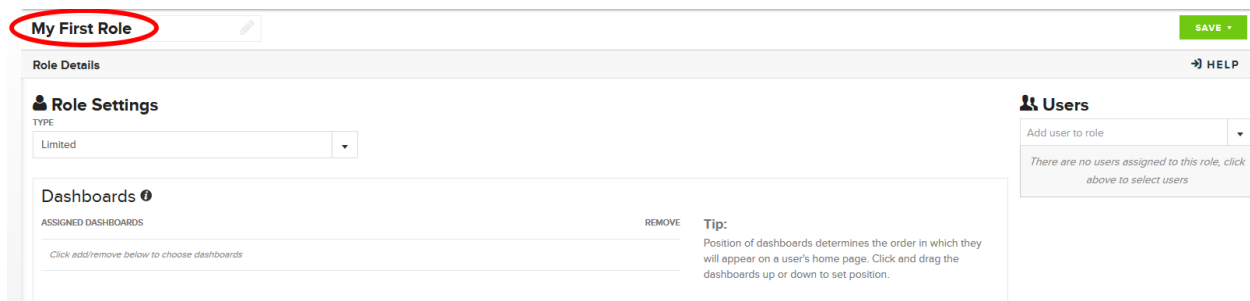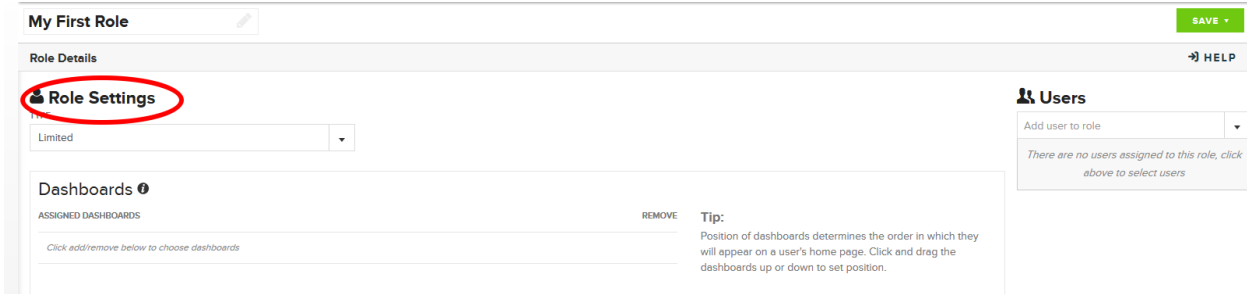
Role Type

Before assigning dashboards, forms and views to the role, you will want to select the Type of role you are creating. There are two options: Limited and Admin.

The **Admin** user type will automatically be granted permission to view and edit all resources in the app. The sections below are only used to set an Admin's preferences for which dashboards appear on their home page and for which forms appear by default when creating records and opening records from a view. When a user is assigned as an app Admin, they will see the 'Admin' icon in the header of the account. This allows them to access the 'App Overview' page for any app where they have been added to an Admin role.

The **Limited** user type requires the assignment of specific resources that have been created within the app in order for them to access anything in the app. See the sections below for an explanation of the resources that can be granted. *Note: The Limited Role is not relevant for the Express package - all users are Super Admins. For additional user permissions, please upgrade to the Pro package*.

Dashboards

This section is where you can give a limited user permission to view a Dashboard and to set a Dashboard as a home page. Click the 'ADD/REMOVE' button to open a dialog for selecting which dashboard is appropriate for this role. This window contains each dashboard in the app. You can assign multiple dashboards to a role, if needed. When you select a dashboard, its elements (Views and Forms) are displayed to the right. When you assign a dashboard to a role and an element on the dashboard has not yet been explicitly granted permission to it, the system will display a GRANT ACCESS button next to it that allows you to grant permission to the view or form on that dashboard. If you click the **Done** button without granting access to all of a dashboard's elements, you will see a warning icon next to it to remind you.

When multiple Dashboards are assigned to a Role, you can drag and drop each Dashboard to position them in a specific order. The first Dashboard in the list will be the home page for the users in that Role. The order of the Dashboards determines the order of the links at the top of the page (from left to right) when a user is viewing a Dashboard. You can display up to four links to a dashboard across the top of your homepage. Any additional dashboards assigned to a user can be accessed under the 'More' drop-down menu.

Forms for creating records

These are the forms used to add records into the system. You can only assign one form per table. That means Limited users can only utilize a single form to add records per each table. The user will only be able to add data into the fields that are included on the form assigned here (unless the field is marked as read only on the form).
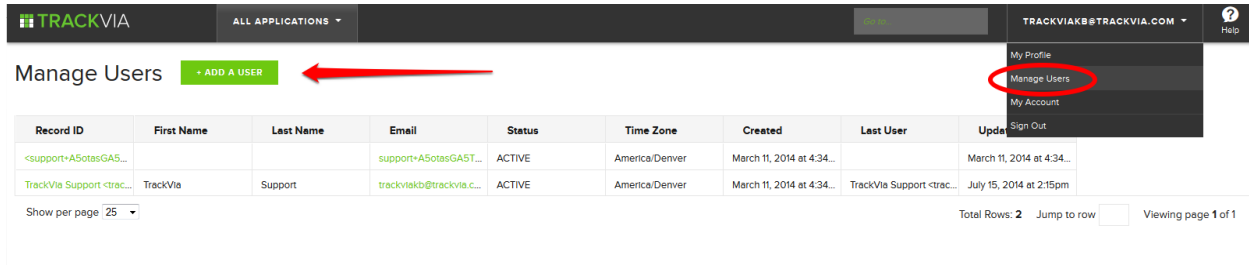
Views & Record Editing

This section allows you to grant limited users access to specific views in a table in the app. When you grant access to a view, you are giving the limited user permission to every record in that view. Next, you will want to choose the form the role is going to use to view or update these records when a single record is opened. The limited user will only be able to update the fields that are included on the form assigned here (unless the field is marked as read only on the form). For a limited role, in the next drop-down menu, you will be able to choose one of three options for the records in the view: 'Read, Update

& Delete', 'Read & Update', or 'Read only'. *Note: The Form Permissions set here will apply to all views that have been assigned the same form. Limited users will only be able to in-cell edit the fields on a view if that view's form has given the user permission to edit it.*

Don't forget to click **Save** before leaving the page!

Invite users!

Now that you know the basics, you can add more users to your account. To do so, click on your email address, and from the drop-down menu, select Manage Users. On the next screen you can click **+Add** A User. *Note: By default, new users have the same permissions as an admin user. To limit access, be sure to uncheck 'Make super admin' and then assign the user to a Role*.

Now that you know the basics of building an app, you may access more detailed information and functions on our help site, http://help.trackvia.com, or visit our You Tube channel for a demonstration.