ApptTrak

User's Manual
Version 1.0b (2 May, 2021)

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Preface

Appointment Track (aka: ApptTrak) was designed to provide businesses with an intuitive, simple-to-use automated method of managing their business-related appointments. The design criteria for ApptTrak were:

1. An uncluttered user interface
2. Store an unlimited number of appointments
3. Appointments can share the same appointment start time
4. Can be used simultaneously by multiple computers on the same network
5. Be Windows XP through Windows 10 compatible
6. Allow appointment start times to run in 15 minute intervals, from 12AM through 12PM (24 hours)
7. Enable user-definable Appointment Category descriptions (up to 20-character length) that are stored in a separate lookup database (e.g. Meeting; Oil Change; Consultation; Teleconference) to speed up data entry and reduce data entry errors
8. Configurable appointment display window (because everyone's business has different operating hours)

ApptTrak has all of these capabilities (and more!)

FastTrack

Configuring the ApptTrak software application for use within your business is simple and straightforward:

1. Download the trial version from the Software by Daughtry web site
2. Install the trial version onto your business' computer(s); all users must have READ/WRITE (or MODIFY) permissions within the ApptTrak folder
3. Populate the Task Type Lookup Database with task category descriptions/codes that apply to your business. For example, if your business is a Dental practice, tasks that would make sense would include: Cleaning, X-Ray, Tooth Extraction, Cavity, General Examination, Root Canal, Bridge (and so on) [note: this database can be amended whenever desired]
4. Configure the appointment grid to display your business hours (e.g. 7:30AM thru 5:30PM) and the desired frequency of display (e.g. every 15 minutes; every 30 minutes)
5. DONE! ApptTrak is now ready for your employees to start entering appointments
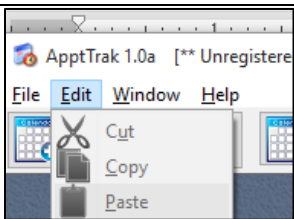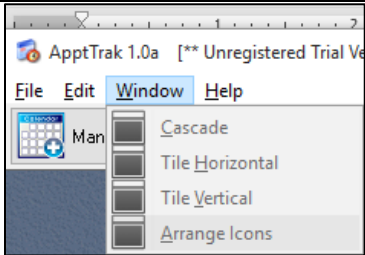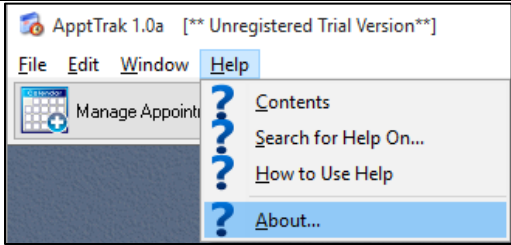
Main Window
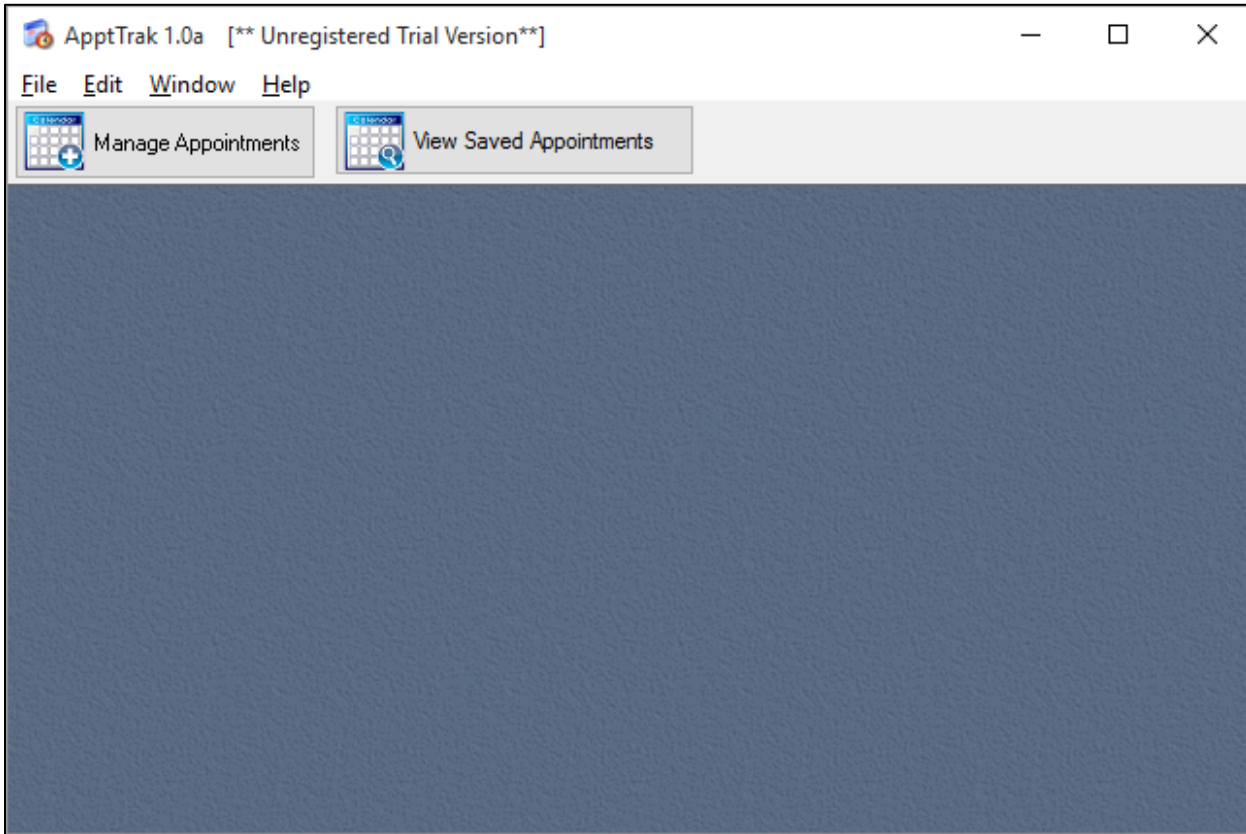
ApptTrak's main window is similar to the majority of Windows-based software applications. The mouse or keyboard can be used to execute its menu functions. A toolbar is displayed directly under the main menu to execute the two most common areas of ApptTrak

1. Manage Appointments = add/edit/delete appointments
2. View Saved Appointments = display onscreen a list of all appointments saved within the ApptTrak database. The entries can't be modified/deleted, but when displayed in a columnar format it enables you to perform an analysis of your company's appointments (e.g. when are your busiest hours of business; what are the most common reasons for an appointment).

The main menu options are:

		The 'FILE' menu items

ApptTrak 1.0a [** Unregistere File Edit Window Help Cut Copy Paste	The 'EDIT' menu items
ApptTrak 1.0a [** Unregistered Trial Ve File Edit Window Help Man Cascade Tile Horizontal Tile Vertical Arrange Icons	The 'WINDOW' menu items
ApptTrak 1.0a [** Unregistered Trial Version**] File Edit Window Help Manage Appoint Contents Search for Help On... How to Use Help About...	The 'HELP' menu items

Appointment Window Browse Screen

Displayed below is an example appointment screen which is used to add/edit/delete appointments (NOTE: The yellow-colored boxes are NOT displayed within ApptTrak – they are shown in the below screen capture for documentation purposes):
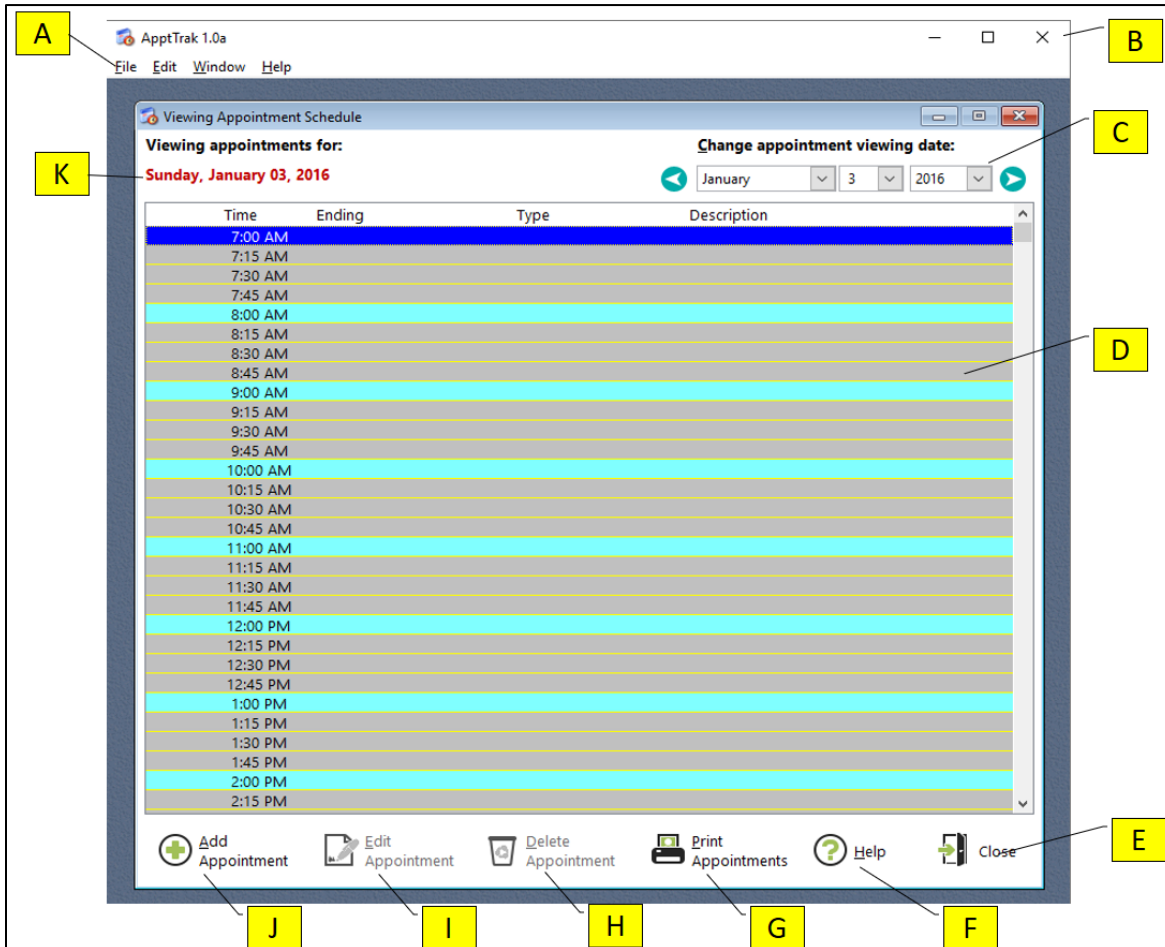

A. A standard Windows-style main menu; underlined letters are combined with the ALT key to execute them (e.g. ALT-F to execute the FILE menu item). The main menu is also mouse-aware; left click the mouse on the desired menu text to execute it.

B. Standard Windows icons that (left to right) minimize this application to the Windows tray bar; reduce the application's windows size from MAXIMIZED to a smaller-sized window or fully close this application.

C. This calendar control is divided into individual droplists for the MONTH, DAY and YEAR. On each side of the droplists are PREV and NEXT arrow buttons that, when clicked, will decrease/increase the displayed date by one day per mouse click. This calendar defaults to the computer's date (which, if connected to the Internet, should always be correct). When the calendar date is changed the appointment grid (labeled as "D" in the above screen capture) is refreshed to display that date's appointments.

D. This listbox displays appointments for the current active date (defined in item C) as a series of horizontal rows (for a specific appointment) and vertical columns (time/ending/type/description). Information displayed in the listbox is stored in/retrieved from the ApptTrak database file (appoint.tps). The columns are NOT sortable by clicking on the column headers; data is sorted/displayed on the Appointment Start Time column. A vertical scrollbar on the right side of the listbox allow you to scroll through the day's appointments. Each new hour

(e.g. 12:00 AM; 1:00 AM; 2:00 AM) is displayed in an alternate color (aqua). The listbox is mouse aware – double left clicking an empty row will create a new appointment for that time; double left clicking a populated row will edit that appointment in a popup window.

E. Close this window (but leave ApptTrak running)
F. Display this screen's help information
G. This button will generate a report for the currently displayed date (in this example, all appointments scheduled for November 28, 2105 would be generated to a report)
H. This button will delete the appointment that is currently highlighted within the listbox. A popup warning message (with YES/NO buttons) will ask if you want to delete that appointment from the ApptTrak database file – clicking YES will *permanently* remove that appointment:
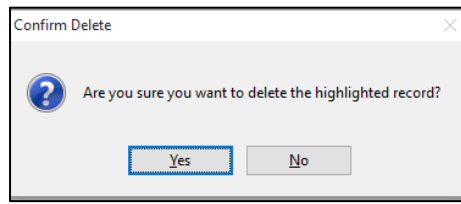
Confirm Delete

Are you sure you want to delete the highlighted record?

Yes   No

This button is disabled if the currently highlighted listbox row does not contain an appointment (because there is nothing to delete in the appointment database for that date/time).

I. This button will edit the appointment that is currently highlighted within the listbox in a popup window. This button is disabled if the currently highlighted listbox row does not contain an appointment (because there is nothing to edit in the appointment database for that date/time).
J. This button will display a popup data entry screen to add a new appointment to the ApptTrak database file.
K. This non-editable, red-colored text string shows the currently active date as defined by the calendar droplists (labeled as "C" in the above screen capture). This text string is automatically updated when the calendar droplist date value is changed with the mouse.

Appointment Data Entry Screen

A data entry screen is used to add, or edit, appointment entries that are stored in the ApptTrak database file (appoint.tps). This method is used over an edit-in-place listbox (increasingly common in Windows applications) to help users enter data correctly, validate data (e.g. the appointment ending time isn't earlier than the appointment start time) and enable other useful data entry "tricks" (such as auto-capitalization of text). The data entry screen's window is titled "Update Appointments File" and is movable anywhere within the ApptTrak application by left clicking this popup window and then dragging the window via the left mouse button to its desired screen location and then releasing the left mouse button.
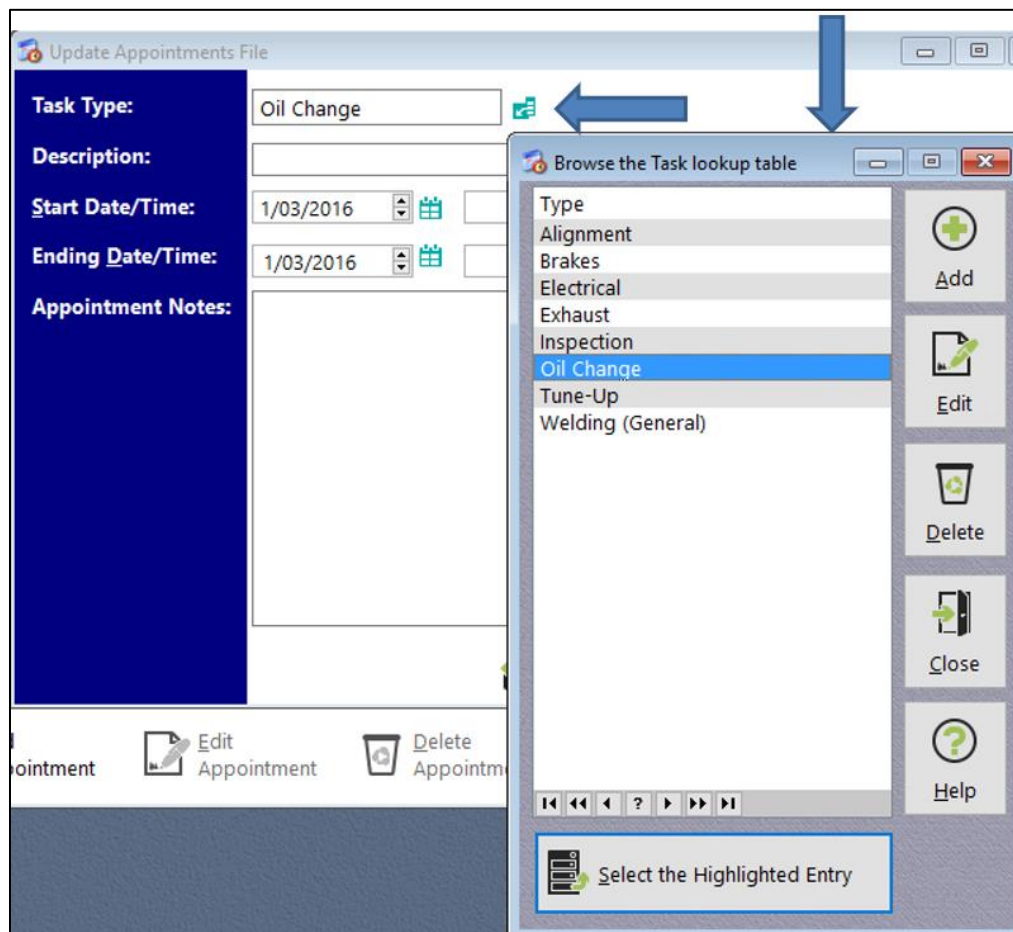

Here is an overview of this screen

A. **Task Type:** This field stores the generic appointment Task Type description using an 'autofill' feature. Autofill is a means of ensuring data integrity by removing human error from the data entry process. In this case, an external database (tasks.tps) is used to store a list of appropriate values for this field – you, the user, define what values are appropriate for this field and add/edit/delete the autofill values (versus the values being pre-defined for you). Features of this autofill field:
    a. Press Alt-Down to display the popup window to add/edit/delete the autofill values.
    b. Click the small icon displayed to the right of the data entry field to add/edit/delete the autofill values.
    c. Press the UP or DOWN keys to cycle through the existing autofill values
    d. When a keyboard key (A-Z, 0-9) is typed, the closest matching autofill value is automatically inserted into this data entry field.
B. **Task Type (Lookup Button):** When clicked, will display the popup window (documented elsewhere within this user's manual) to add/edit/delete entries stored in the Task Type autofill database.
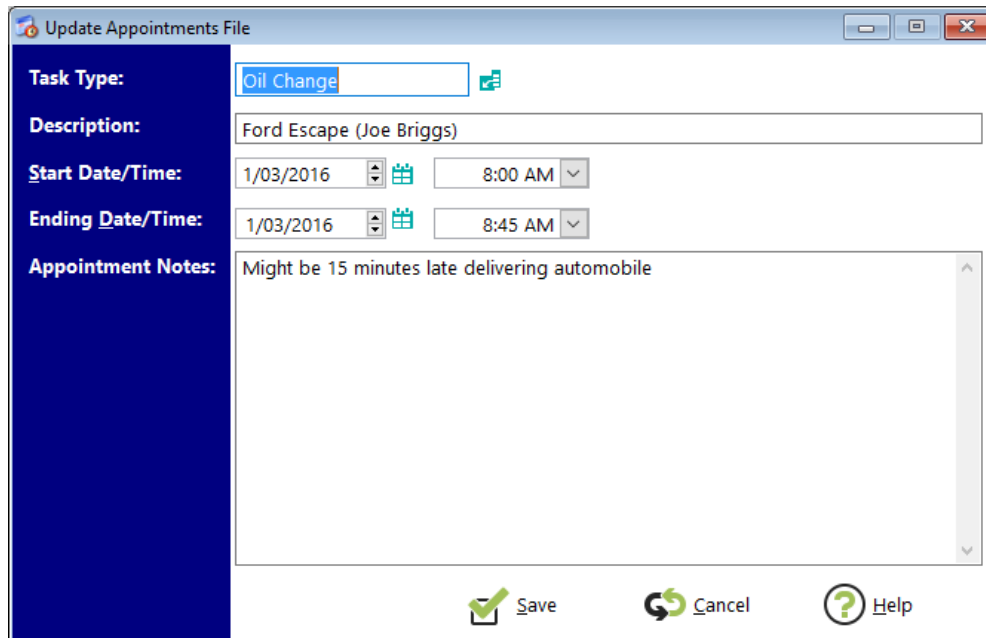C. **Description:** This field stores a meaningful description for this appointment (80 character maximum length).

D. **Start Date/Ending Date:** Both date fields use the same methods to define their values:
   1. The starting date defaults to the date being shown in the appointment window.
   2. The date value can be manipulated several different ways:
      a. Manually typed via the keyboard in MMDDYYYY format.
      b. Click the small up/down arrow buttons to increment/decrement the date value.
      c. Click the small calendar button to display a popup calendar to select the desired date.

E. **Start/Ending Time:** Both time fields use a droplist of possible time values to select an appropriate time the droplist value is automatically inserted into the field.

F. **Notes:** Enter miscellaneous notes into this field regarding this appointment.

G. Display this screen's help information

H. Abandon adding/editing this database record

I. Save this information to the database

The screen capture below shows the Task Type lookup table being accessed to select an autofill value. Note that the autofill task types can be added/edited/deleted "on the fly" to meet your appointment needs (note: it is recommended to keep the number of Task Type descriptions to a minimum to ensure your appointments are appropriately organized. For example, the Task Type 'Oil Change' speaks for itself; adding additional entries for 'Oil Change – Toyota' or 'Oil Change – Ford Cortina' is redundant). This autofill window will automatically close itself after the desired code has been selected:

The screen capture below shows all of the data entry fields being populated:

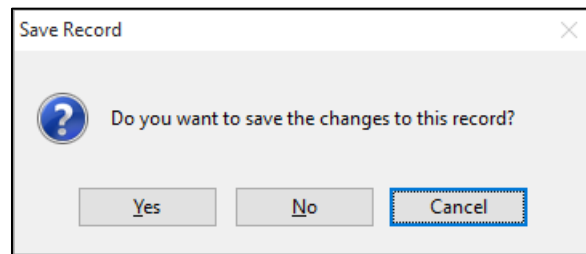A popup window will appear onscreen to ask if you attempt to abandon adding/editing information for this database record (i.e. clicking the CANCEL button; pressing the ESCape key; clicking the window close button):

If the NO button is clicked then the data is NOT saved to the database; if the CANCEL button is clicked you are returned back to the data entry screen. If YES is clicked the information is saved to the database and you are returned to the Main Appointments Window.

The screen capture below shows the appointment schedule after being modified via the data entry window's OK button being clicked (to save the inputted data to the tasks.tps database):
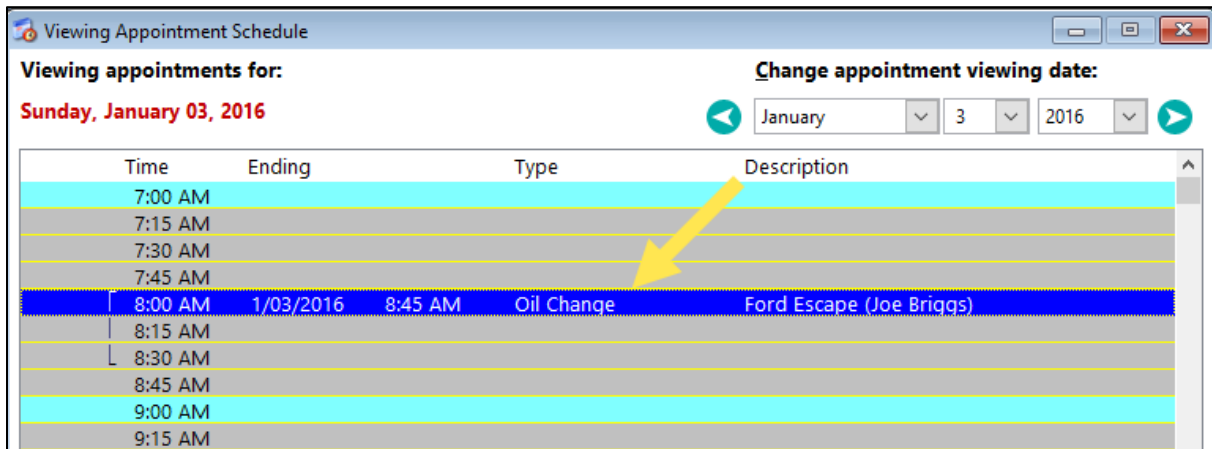
A not-so-obvious feature is that the listbox displays a graphical 'bracket' for every appointment to the left of the appointment start time (highlighted via the red-colored arrows in the below screen capture):
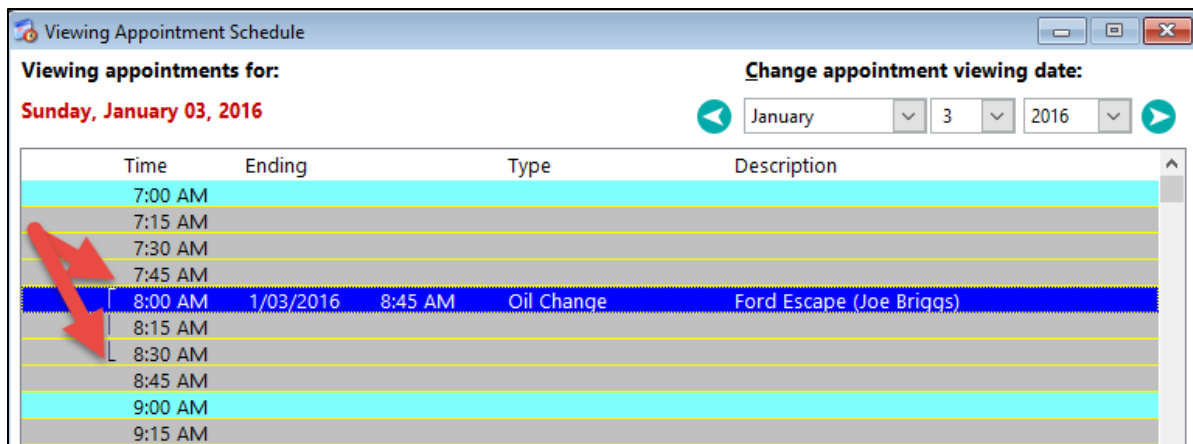
Note: if additional appointments are made that also start at 8:00AM they are automatically grouped together (because the appointment listbox is sorted on the appointment start time column in ascending time sequence):
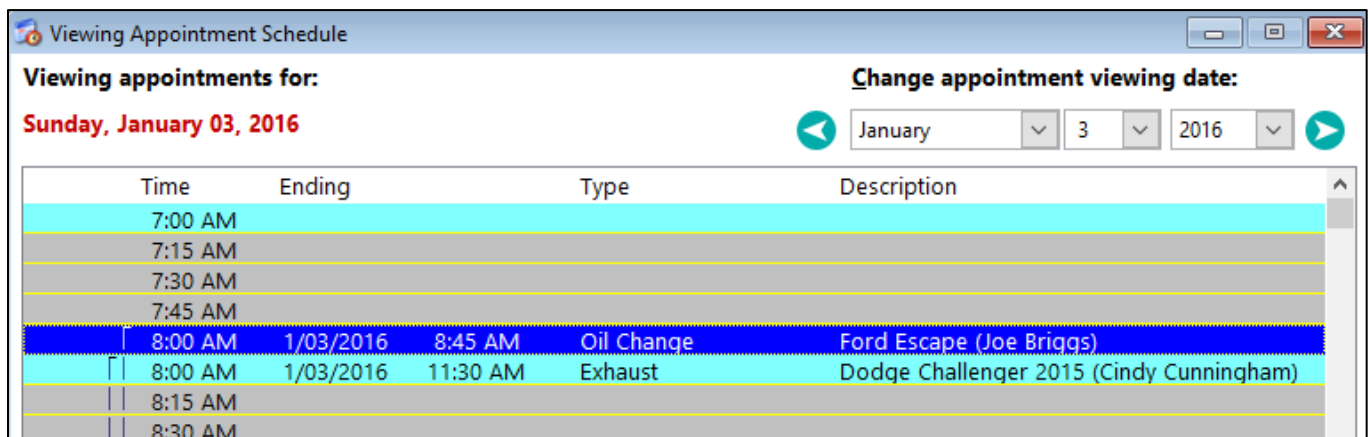
Configuring the Appointment Grid

Everyone's appointment scheduling needs are different; some businesses are open 24 hours a day while others may have a 7:00AM to 5:00PM business schedule. By default, ApptTrak's appointment grid starts at 12AM and ends at 12PM with 15-minute time increments displayed onscreen:
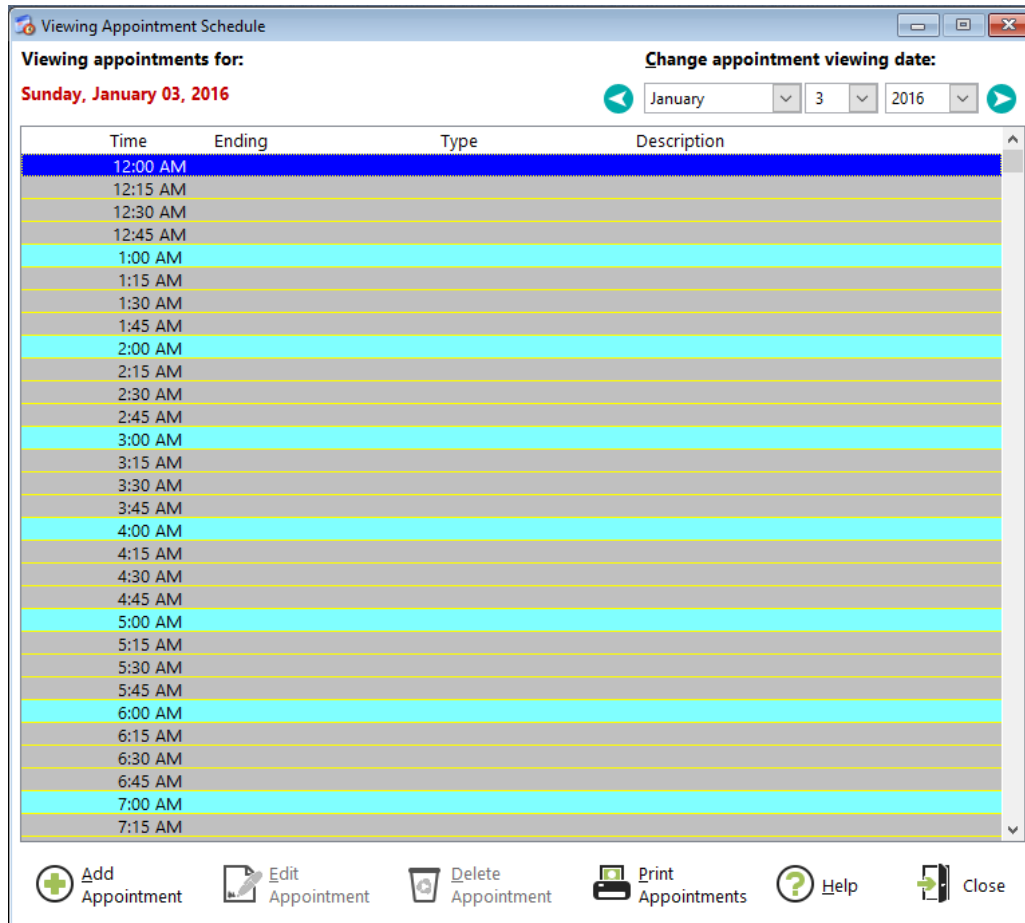
To reconfigure the appointment grid to reflect your business' operational hours, select the main menu item titled 'Configure the Appointment Grid':
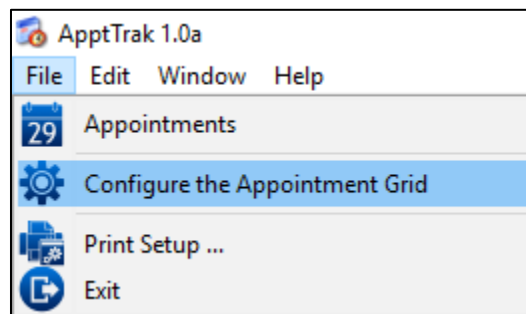
Once this menu option is executed this window will appear onscreen:

The default values for the three appointment grid parameters:

- Start Hour for the Appointment Grid: 0
    - The droplist starts at zero, which is equal to midnight/12AM; the droplist has values of 0 thru 11AM
- Each Hour Is Broken into These Increments: 15
    - Radio buttons are displayed for the four predefined values (15/30/45/60 minute increments)
- Number of Time Intervals to Display Within the Grid: 96
    - For the default value of 12AM through 12PM, there are 24 hours to display onscreen in 15 minute increments. There are four increments within each hour, so 24 * 4 = 96 total time intervals

When these values are changed they are then stored in the application's *.INI configuration file. When ApptTrak is first started the ApptTrak.Ini file is opened and these three values are retrieved (and then stored in memory).

Here are some screen captures that show what happens when these three values are changed and how they affect how the appointment grid changes to accommodate that change:
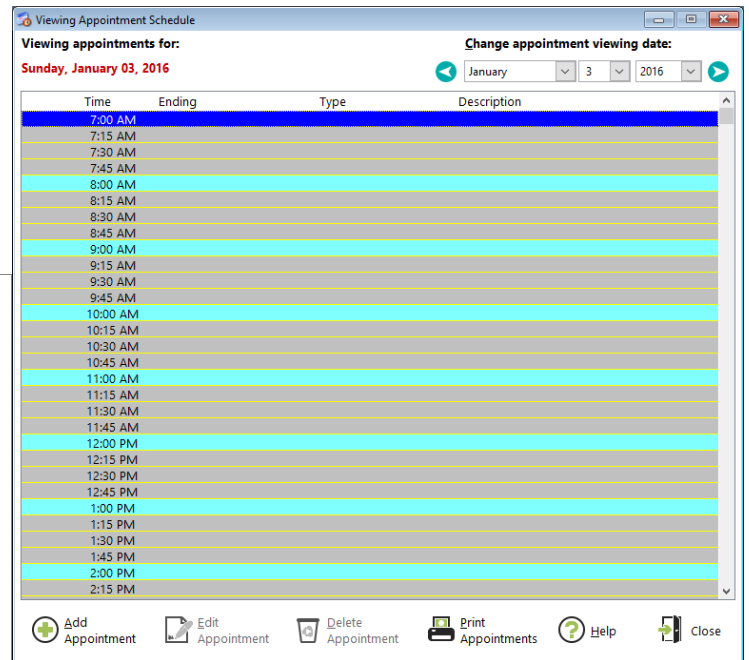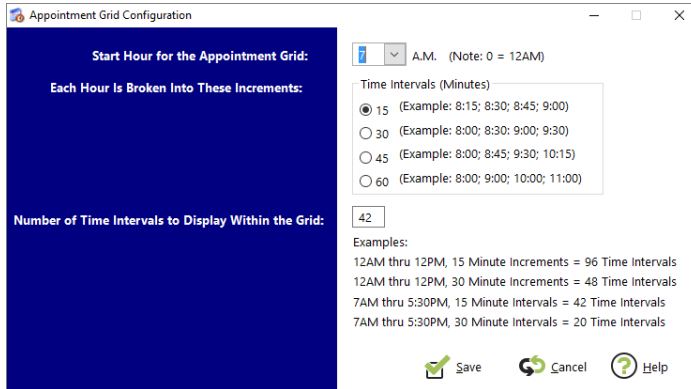
The above screen capture shows the Appointment Grid Configuration as:

- Start time: 7AM
- Increments: 15 minute time increments (i.e. 7:15; 7:30; 7:45)
- Time Intervals: 42 intervals (which equates to 5PM)
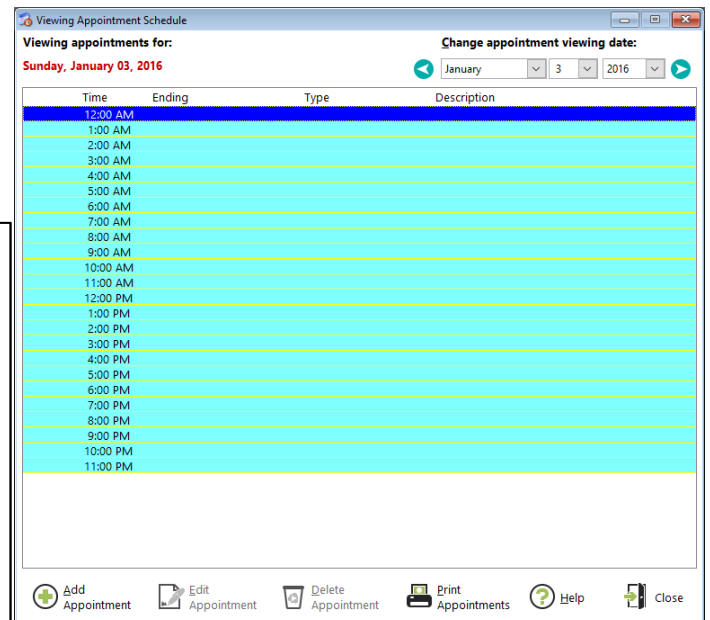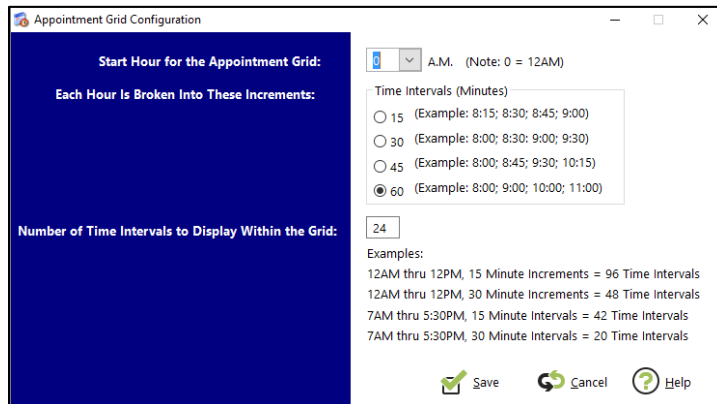
The above screen capture shows the Appointment Grid Configuration as:

- Start time: 12AM
- Increments: 60 minute time increments (i.e. 12AM; 1AM; 2AM)
- Time Intervals: 24 intervals (which equates to 11PM)

Note: To display 12AM to 12PM the 'Number of Time Intervals' would be set to a value of 25

Browse Appointments

This browse screen is used to view all of your company's saved appointments within a single screen and then provide you with the ability to conduct an analysis of the types of appointments that you are scheduling, when your busiest time of day for appointments is, etc. Here is a screen capture of the window:
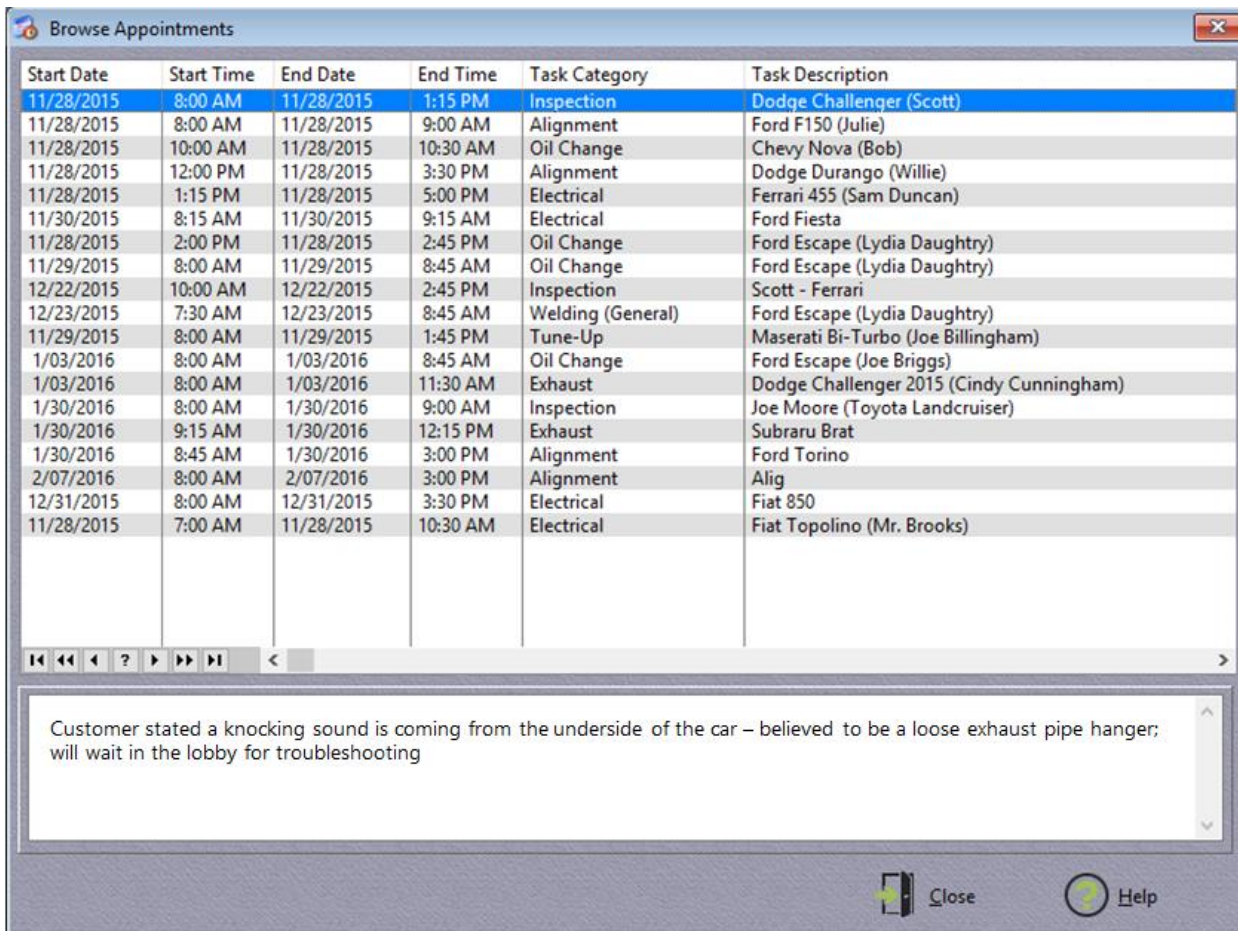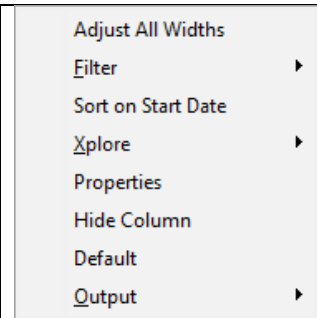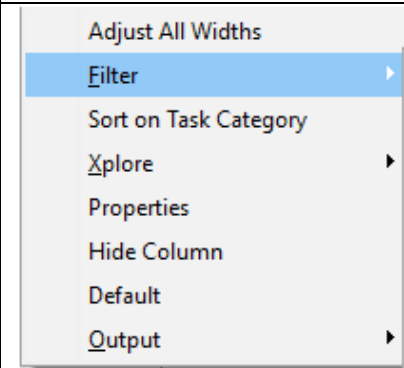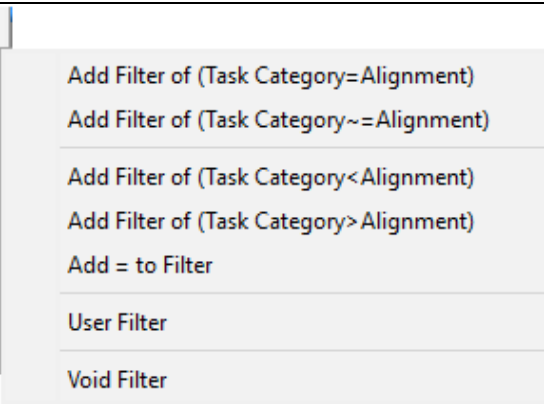
The window is deceptively simple at first glance – you cannot edit or delete appointments from this window. The box displayed below the listbox is where the appointment's notes are displayed for the highlighted appointment entry (and that area is automatically refreshed when a different appointment is selected from the listbox.

When the mouse is right-clicked from within the listbox a popup menu is displayed onscreen to:
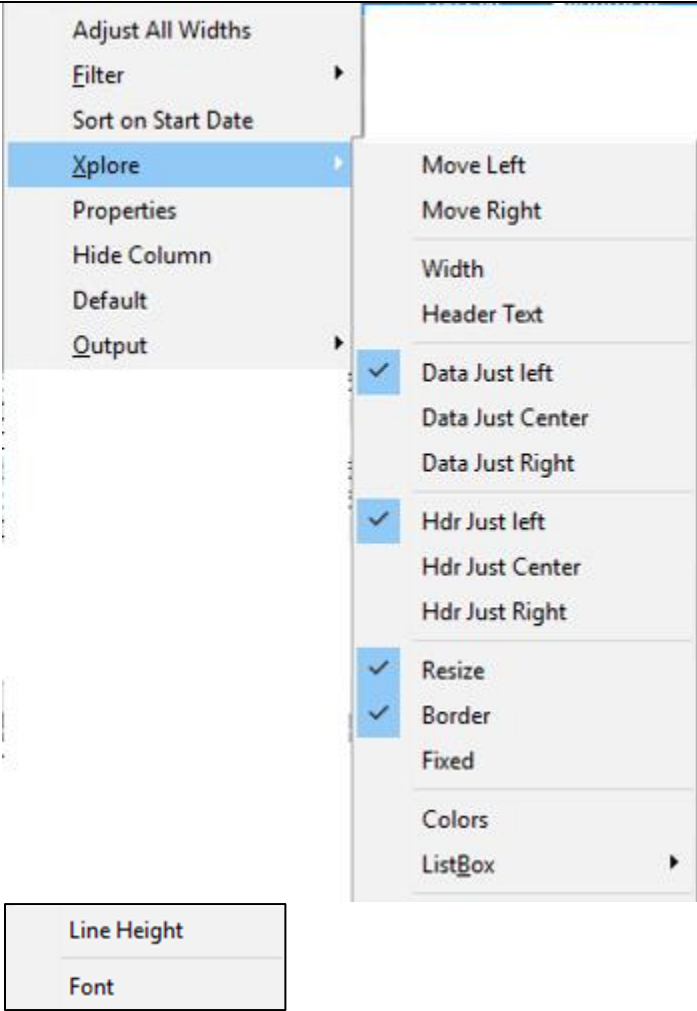
1. Configure the appearance of this listbox (e.g. use a different font type/size; add or remove columns)
2. Create/activate a filter condition to 'hide' information being displayed within the listbox and show only that information that you deem important (e.g. Task Category = Alignment appointments only)
3. Create a bar chart from some of the listbox columns

Here is a 'drill down' explanation of the right-click popup menu:

Adjust All Widths Filter ▶ Sort on Start Date Xplore ▶ Properties Hide Column Default Output ▶	**[RIGHT CLICK MENU]** This is the initial appearance of the popup menu; there are three expandable submenus (Filter, Xplore, Output) - Adjust All Width: resize each column's width to the minimum required to display the longest data stored for that database field - Filter: options explained further below - Sort on Start Date: sort, in ascending sequence (A-Z, 1-9) the column that the mouse cursor was floating over when the right mouse button was clicked (note: the mouse was floating over the Start Date column when clicked) - Xplore: options explained further below - Properties - Hide Column: toggles this column to be hidden/unhidden - Default: reset the listbox settings back to default values - Output: options explained further below
Adjust All Widths Filter ▶ Add Filter of (Task Category=Alignment) Sort on Task Category Add Filter of (Task Category~=Alignment) Xplore ▶ Add Filter of (Task Category<Alignment) Properties Add Filter of (Task Category>Alignment) Hide Column Add = to Filter Default Output ▶ User Filter Void Filter	**[FILTER SUBMENU]** The filter menu uses the current column that the mouse is hovering over to take some type of filtering action upon. The options displayed in the popup menu are the same, but the field name will change. For this screen capture the 'Task Category' column was affected. From top to bottom: - (=) only column entries where 'Task Category equals 'Alignment' will be displayed - (~=) Task Management column cannot be 'Alignment' - (<) used for numeric columns; no effect on text; Task Category is less than a specific number - (>) used for numeric columns; no effect on text; Task Category is greater than a specific number - (=)

	- User Filter: display a popup window that lets you build a freeform filter condition: Task Description ○ = ○ < ○ > ○ <= ○ >= ○ <> ⦿ Contains Value [Ford] [Search] - Void Filter: display all database records again within the listbox

Adjust All Widths
Filter ▶
Sort on Start Date
Xplore ▶ → Move Left
Properties Move Right
Hide Column Width
Default Header Text
Output ▶ ✓ Data Just left
  Data Just Center
  Data Just Right
  ✓ Hdr Just left
  Hdr Just Center
  Hdr Just Right
  ✓ Resize
  ✓ Border
  Fixed
  Colors
  ListBox ▶
 	
Line Height
Font
	[XPLORE MENU]
	This submenu configures how the database information is displayed within the listbox for the active listbox column. A checkmark is displayed for the currently active setting:
	
	- Move Left/Move Right: move the selected column left or right within the listbox
	- Width: change the width of the selected column
	- Header Text: Change the text that is displayed for the selected column
	- Data Just Left/Data Just Center/Data Just Right: change the justification of the text displayed for the selected column
	- Hdr Just Left/Hdr Just Center/Hdr Just Right: change the justification of the selected column's header
	- Resize: toggle if this column's width can be resized
	- Border: toggle if this column will display a border
	- Fixed: toggle if this column can/cannot be altered
	- Colors: change the color of this column
	- Listbox: display a submenu to change this listbox' Line Height and Font [note: when the font size is changed odds are you will have to change the Line Height value so text is displayed properly)
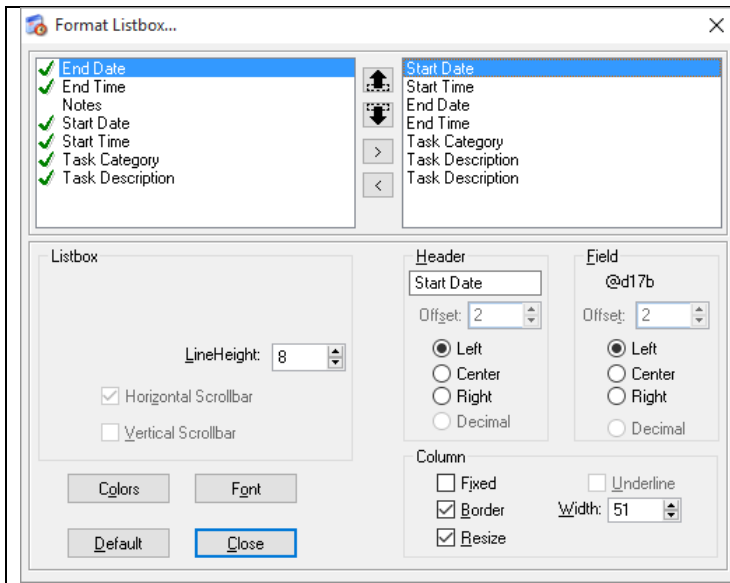
Format Listbox...	**[PROPERTIES MENU]** The top half of this window displays all of the database fields (left listbox) and fields currently used within the listbox (right listbox). You can add/subtract fields (that are displayed as listbox columns) as desired.
	The bottom left area allows you to modify the listbox's line height size; configure scrollbars; change the listbox color and the font type/style/size for the listbox content.
	The bottom right area allows you to change the listbox column's properties that is selected in the top right listbox (i.e. the header text and how it is aligned; that column's alignment and picture string) and how that column is displayed (i.e. is it fixed or resizable; does it possess a border; set it's display width [in pixels])
	[OUTPUT MENU] Graph on <column name>: Create a simple bar graph from the currently selected column (for this example it's the "Task Category" column)
	Print All / Print Page: self-explanatory; the output will use the same format/sort order as the listbox
	Export to Ascii: creates a Microsoft Excel *.CSV file from the database, using the same format/sort order as the listbox
	Export to HTML: creates a simple Internet Browser *.HTM file from the database, using the same format/sort order as the listbox
	Examples of each are shown below
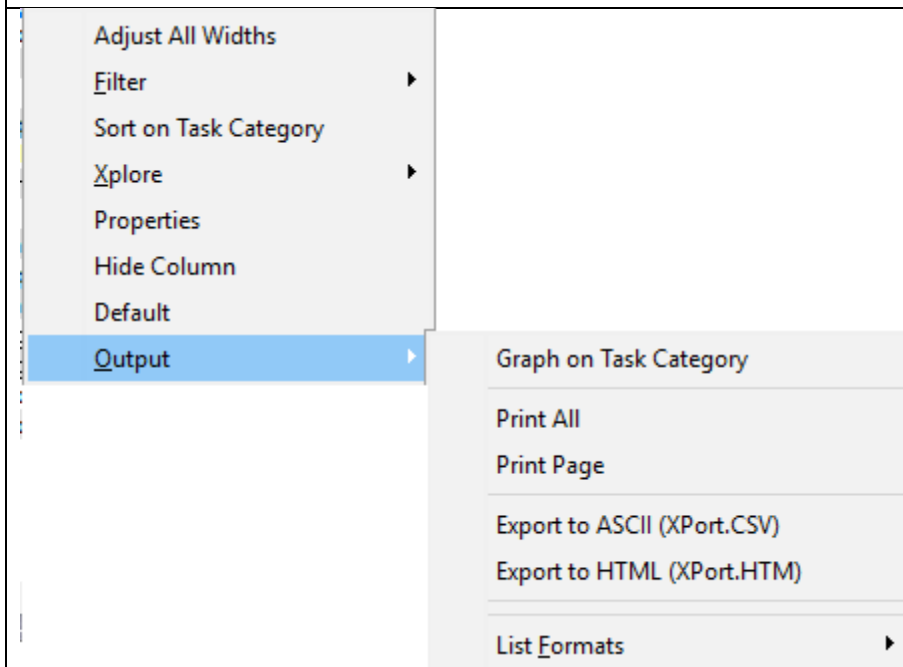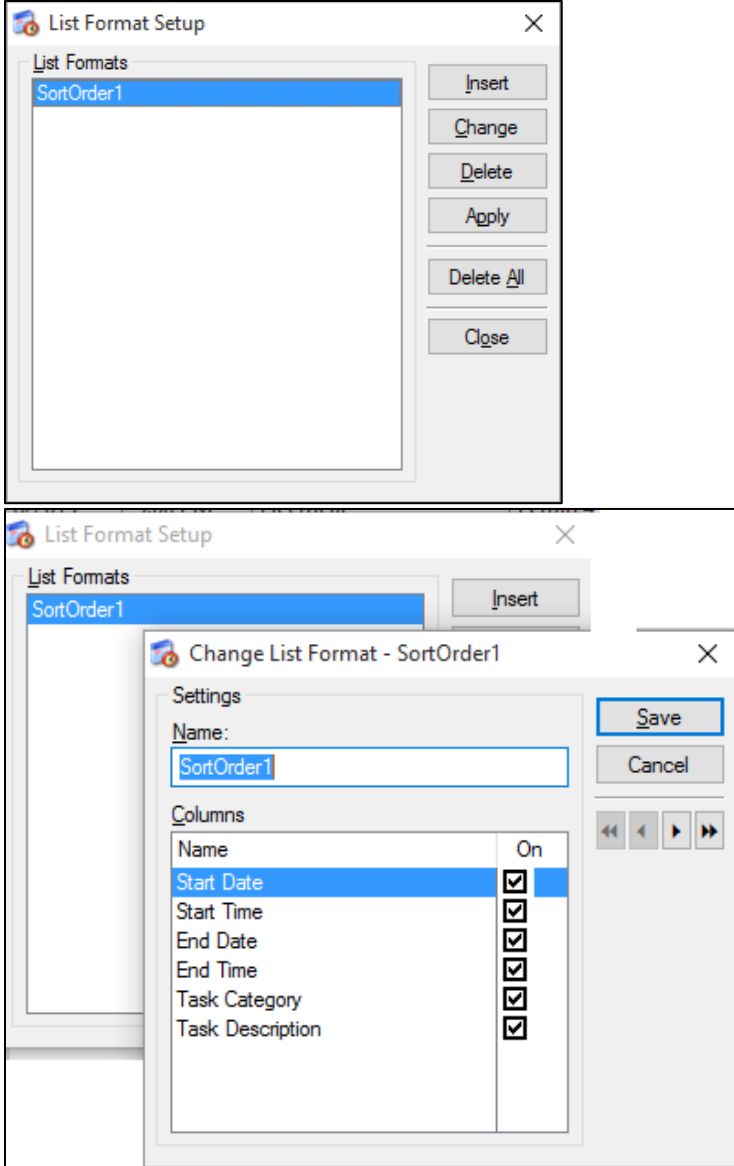
[LIST FORMATS]
Configuration options (that can be saved/restored) on how the listbox can be sorted. A single column or multiple columns can be used to sort the listbox by check marking / uncheckmarking the desired column(s).

While this method of defining a listbox sort order is obsolete (because this listbox recognizes the standardized Windows method of sorting columnar information by clicking column headers), this method still works

The Graph report (with some configuration options via the PREFERENCES button at the top left of the print preview window):
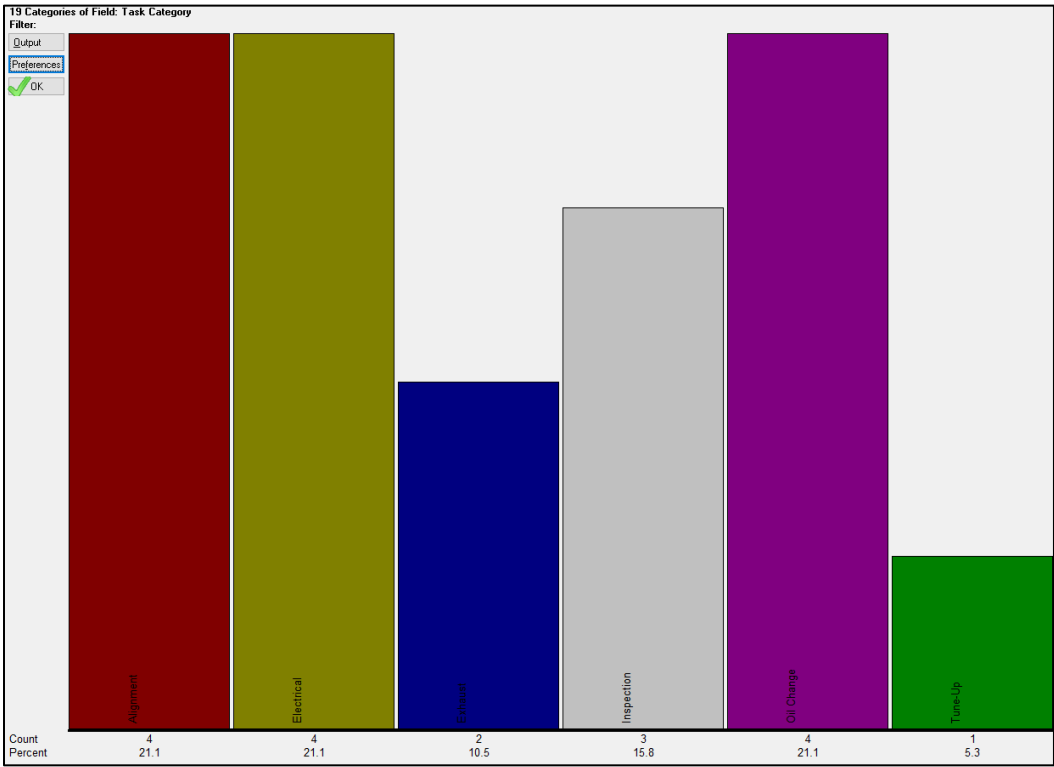
The Graph Preferences options:
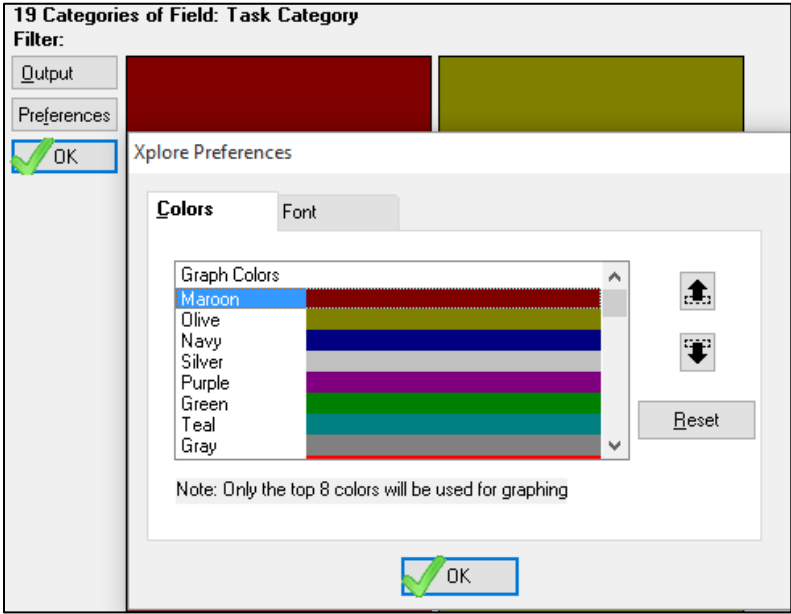
Sample output from the Print All option (which sent the output to a print preview window):

Sample output from the 'Export to ASCII (Xport.CSV) option that has been imported into Microsoft Excel:

Sample output from the 'Export to HTML (XPort.HTM) option being displayed in a web browser:

Browse Appointments

Start Date	Start Time	End Date	End Time	Task Category	Task Description
11/28/2015	8:00 AM	11/28/2015	1:15 PM	Inspection	Dodge Challenger (Scott)
11/28/2015	8:00 AM	11/28/2015	9:00 AM	Alignment	Ford F150 (Julie)
11/28/2015	10:00 AM	11/28/2015	10:30 AM	Oil Change	Chevy Nova (Bob)
11/28/2015	12:00 PM	11/28/2015	3:30 PM	Alignment	Dodge Durango (Willie)
11/28/2015	1:15 PM	11/28/2015	5:00 PM	Electrical	Ferrari 455 (Sam Duncan)
11/30/2015	8:15 AM	11/30/2015	9:15 AM	Electrical	Ford Fiesta
11/28/2015	2:00 PM	11/28/2015	2:45 PM	Oil Change	Ford Escape (Lydia Daughtry)
11/29/2015	8:00 AM	11/29/2015	8:45 AM	Oil Change	Ford Escape (Lydia Daughtry)
12/22/2015	10:00 AM	12/22/2015	2:45 PM	Inspection	Scott - Ferrari
12/23/2015	7:30 AM	12/23/2015	8:45 AM	Welding (General)	Ford Escape (Lydia Daughtry)
11/29/2015	8:00 AM	11/29/2015	1:45 PM	Tune-Up	Maserati Bi-Turbo (Joe Billingham)
1/03/2016	8:00 AM	1/03/2016	8:45 AM	Oil Change	Ford Escape (Joe Briggs)
1/03/2016	8:00 AM	1/03/2016	11:30 AM	Exhaust	Dodge Challenger 2015 (Cindy Cunningham)
1/30/2016	8:00 AM	1/30/2016	9:00 AM	Inspection	Joe Moore (Toyota Landcruiser)
1/30/2016	9:15 AM	1/30/2016	12:15 PM	Exhaust	Subraru Brat
1/30/2016	8:45 AM	1/30/2016	3:00 PM	Alignment	Ford Torino
2/07/2016	8:00 AM	2/07/2016	3:00 PM	Alignment	Alig
12/31/2015	8:00 AM	12/31/2015	3:30 PM	Electrical	Fiat 850
11/28/2015	7:00 AM	11/28/2015	10:30 AM	Electrical	Fiat Topolino (Mr. Brooks)

Report: Today's Appointments

When the PRINT APPOINTMENTS button

Print Appointments

is clicked from the 'Viewing Appointment Schedule' window a report is generated for that currently displayed day

is generated and then displayed in the Print Preview window:

Report Preview   [HP LJ300-400 color M351-M451 PCL 6 on USB001]   —   □   ✕

Zoom Pct 89 ⌄ ◀◀ ◀◀ ◀▯▶ ▶▶ ▶▶   Page   1 ⬍ of 1   🖨   Copies 1 ⬍ ✖ Pages to Print All   🔭 📌

Appointment Schedule
Viewing Appointments for Saturday, November 28, 2015

Start Date/Time	End Date/Time	Task Type	Appointment Description
11/28/2015 / 8:00AM	11/28/2015 / 9:00AM	Alignment	Ford F150 (Julie)
11/28/2015 / 8:00AM	11/28/2015 / 1:15PM	Inspection	Dodge Challenger (Scott)
11/28/2015 / 10:00AM	11/28/2015 / 10:30AM	Oil Change	Chevy Nova (Bob)
11/28/2015 / 12:00PM	11/28/2015 / 3:30PM	Alignment	Dodge Durango (Willie)
11/28/2015 / 1:15PM	11/28/2015 / 5:00PM	Electrical	Ferrari 455 (Sam Duncan)
11/28/2015 / 2:00PM	11/28/2015 / 2:45PM	Oil Change	Ford Escape (Lydia Daughtry)

Report Generated On:11/30/15 at 9:03PM   Page: 1

Print Preview Window

All ApptTrak report(s) are generated to the Print Preview window – this enables you to view the report onscreen without wasting paper/printer toner. At the top of this window is a toolbar with options to view / print the report:
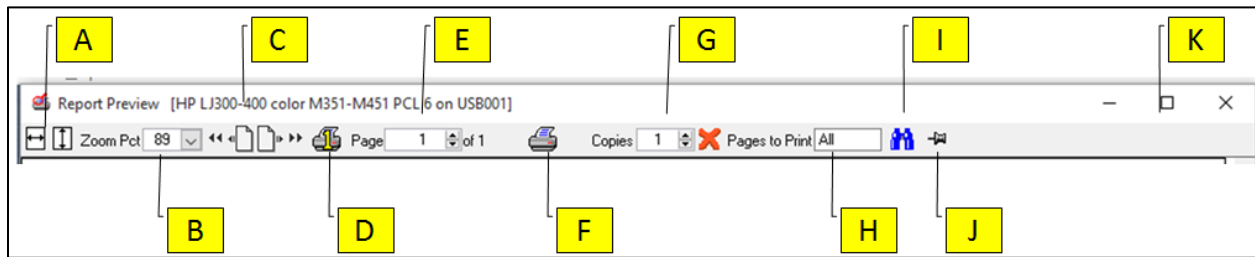
A. These two buttons toggle the report viewing mode from full width mode to full page mode
B. This drop list changes the Zoom Percentage for how the report is displayed onscreen
C. These four "VCR" style buttons allow you to quickly navigate through a multi-page report (first page, previous page, next page, last page)
D. Print only the currently displayed report page
E. Display your printer's Print Options popup window (where you can also define the # of copies to print; a range of pages to print; etc.)
F. Define the number of copies of the report to print
G. Define the range of pages to send to the printer (e.g. 3-10)
H. Search for text within the report
I. Pin the currently displayed page for printing
J. Standard Windows operating system icons to minimize the Print Preview screen, reduce the window size or close the Print Preview window

If the ESCape key is pressed the Print Preview window is closed without sending the report to the printer.

Task Type Browse Window

This popup window enables you to add/edit/delete Task Type descriptions that are stored in a separate lookup database:
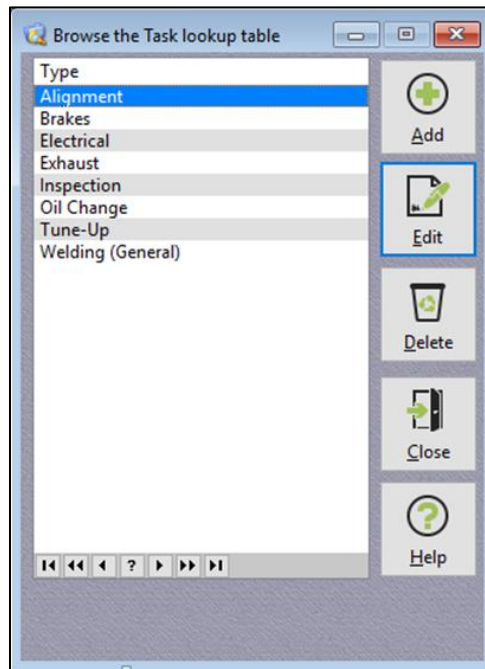
The listbox is automatically sorted alphabetically in ascending (A-Z) sequence. ApptTrak does not allow duplicate entries to be stored to this database file; only unique entries are allowed (i.e. you can't have 'Inspection' saved twice to this database); if you attempt to add a duplicate entry a popup window will tell you this isn't allowed:
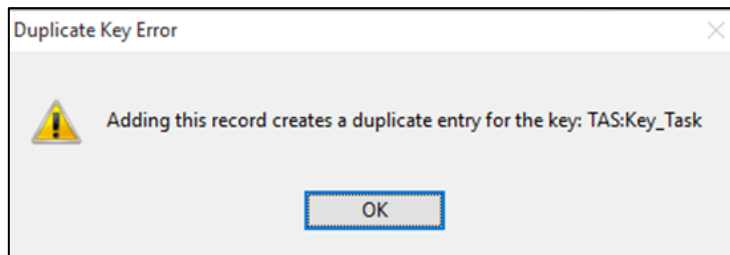
 When the ADD or EDIT buttons are clicked a popup data entry window is displayed onscreen. When the DELETE button is clicked a popup warning is displayed to confirm the deletion of that database record; deletion of entries stored within this database is permanent.

Task Type Data Entry Screen

This window enables you to add a new entry into the database or edit an existing entry. Information entered into this data entry field (limited to 20 characters in length) is automatically converted to Proper Case (i.e. the first letter of each word is converted to upper case IF the CAPS LOCK key is turned off):
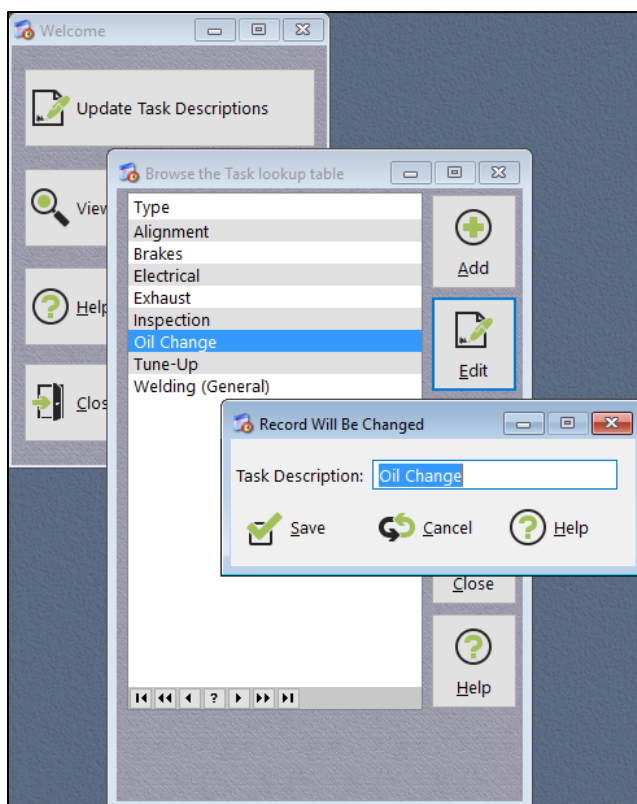
Technical Information:

ApptTrak's space requirements are very small; here is a screen capture of all of the ApptTrak files:

Name	Ext	Size	Date
⬆ ..		<DIR>	02/07/2016 20:41
ClaASC.dll		69,968	02/02/2016 11:51
ClaDOS.dll		59,216	02/02/2016 11:51
ClaOLE.dll		75,088	02/02/2016 11:52
ClaRUN.dll		1,681,488	02/02/2016 11:52
ClaTPS.dll		123,216	02/02/2016 11:52
cpc100p32.dll		86,272	05/24/2015 14:28
CWHHla.dll		10,752	01/29/2016 11:24
vuLimit.dll		35,328	03/11/2008 19:02
ApptTrak.exe		1,184,768	02/07/2016 20:26
ApptTrak.INI		2,453	02/07/2016 20:36
APPOINT.TPS		8,960	02/07/2016 20:36
TASKS.TPS		1,536	02/07/2016 20:05
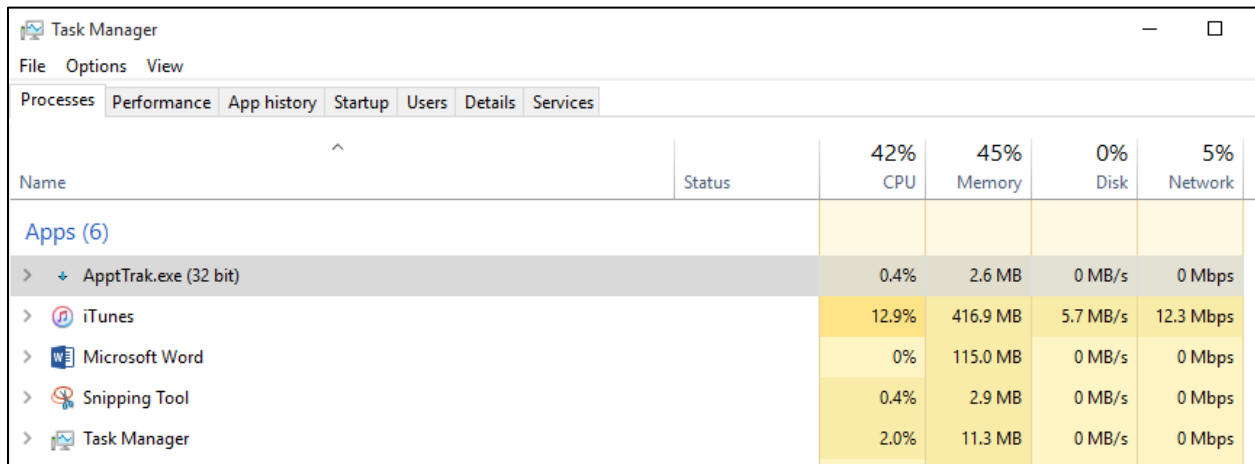
ApptTrak does not store data in any other locations on your computer (e.g. C:\Program Files) or within the Windows registry.

A breakdown of the ApptTrak files:

- ClaASC.DLL: runtime file used for ASCII file manipulation
- ClaDOS.DLL: runtime file used for MsDos low level functions
- ClaOLE.DLL: runtime file used to coordinate with the Windows operating system
- ClaRUN.DLL: runtime file required for the application's executable file
- ClaTPS.DLL: runtime file used to manage the application's database files
- CPC100P32.DLL: runtime file for the print preview window
- CWHHLa.dll: runtime file to display the runtime help (*.CHM)
- vuLimit.DLL: runtime file used for low-level file encryption/manipulation
- ApptTrak.exe: application executable file
- ApptTrak.Ini: application configuration file to store runtime settings
- Appoint.Tps: database that stores the appointment information
- Tasks.Tps: database that stores the Task Type lookup codes

ApptTrak also does not place much burden on your computer's Central Processing Unit (CPU; aka: "brain"), hard drive or memory. Here is a screen capture of ApptTrak running on a Windows 10:

Data Backup

Every company should draft/implement/execute a plan to archive their electronic data to external media, another company-owned computer system and/or the "Cloud" to protect their data from irretrievable loss due to power spikes, power outage and/or theft of the host computer system(s). ApptTrak stores its data within *.TPS files – at a minimum, your data backup routine should archive the ApptTrak *.TPS files on a recurring basis. Should the ApptTrak software need to be reinstalled onto another company-owned computer system, the recovery process would require the reinstallation of the ApptTrak software (likely downloaded from the Software by Daughtry web site); enter your unique registration code(s) to fully activate the ApptTrak software application, and then recover the *.TPS files from your data archive into the ApptTrak installation folder.

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