



Trackbase Lite User Manual



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Release date: June 2005

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Minimum Specification

To run Trackbase Lite you will need the following minimum specification:

- Microsoft Windows 95, Windows 98, Windows ME, Windows 2000, Windows XP or Windows NT v4.0 or higher
- If you are running on a Macintosh then you will need to be running a Windows emulator
- At least 64MB of memory (128MB for best performance)
- At least 100MB free hard disk space. We recommended you have at least 2MB extra per 1000 projects you put on the system
- If you require access to ABI's website service then it is recommended you have Microsoft Internet Explorer 4.0 or higher or Netscape Composer or Navigator
- If you have chosen to receive your weekly data via email then you will need access to an email management program such as Microsoft Outlook Express, Microsoft Outlook or Lotus Notes
- Optional extras you may need if you choose to use the mail merge feature of Trackbase are Microsoft Word, Microsoft Excel or Lotus WordPro

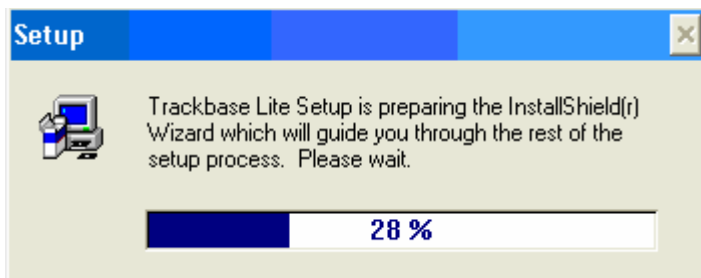
The above is a recommended minimum specification for standalone Trackbase Lite.

Installing Trackbase Lite

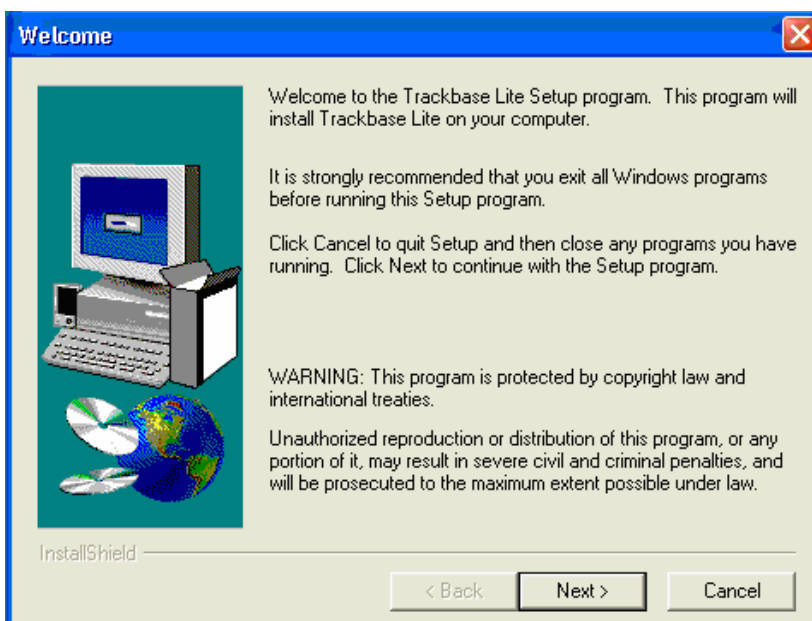
Installing from CD

To install Trackbase Lite from CD, please follow the steps below:

1. Close any programs you have open on your computer.
2. Insert the install CD.
3. The install wizard will now initialise:
 - a. If your computer does not have Autoplay enabled then you will need to start it manually. If it does then please skip to step 4.
 - b. Click on your 'Start' menu.
 - c. Click on 'Run'.
 - d. Type in **d:\setup.exe** and press ENTER.
 - e. The installation will now begin.

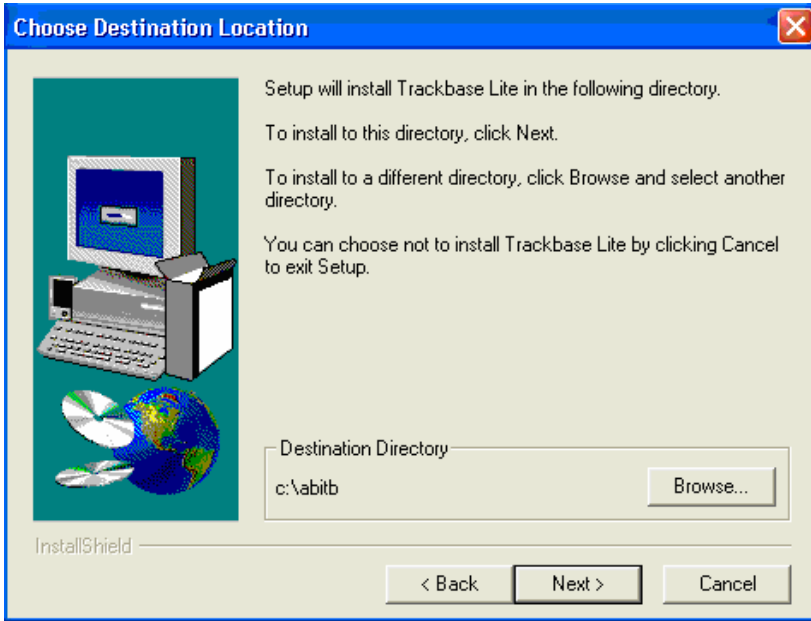


4. Once the install wizard has finished loading you will be taken to the welcome screen.



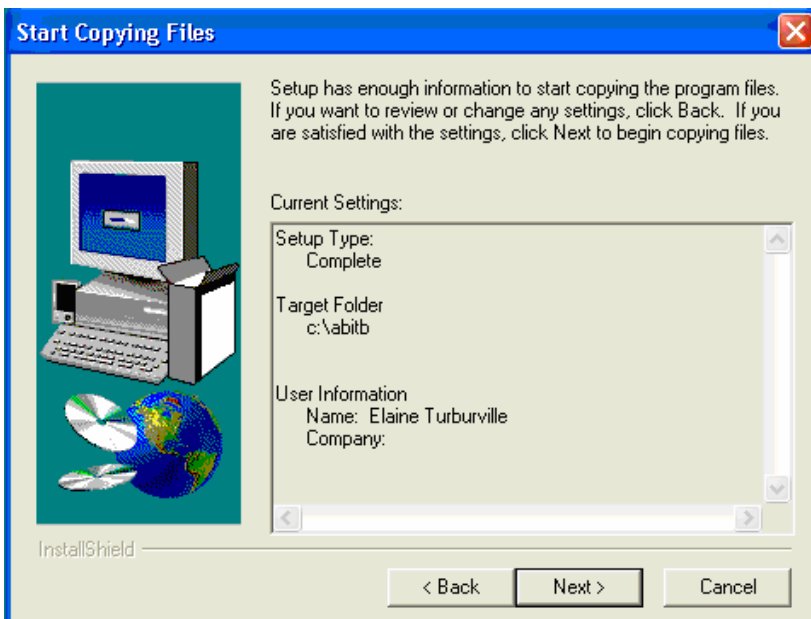
5. Press 'Next' on this screen.

- You will then be shown a screen asking where to install Trackbase Lite. By default this will be C:\abitb where a folder will be created.

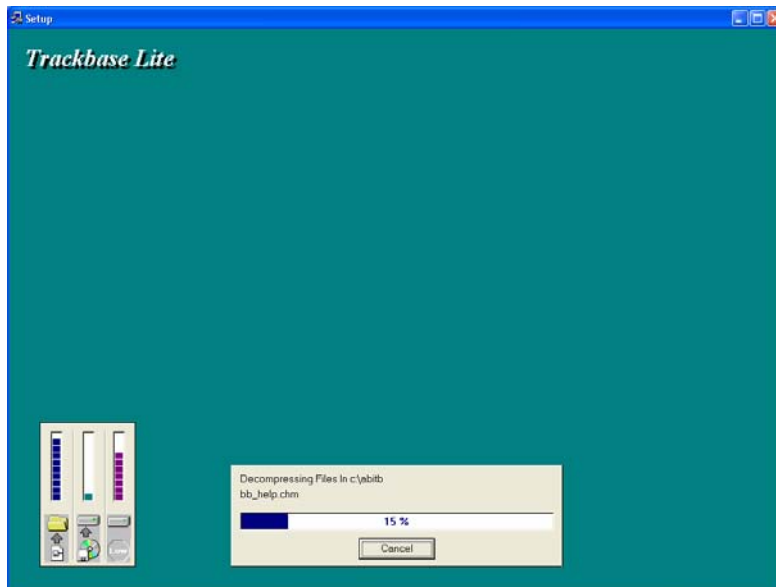


Note: Trackbase Lite cannot be installed to a location with a name longer than 8 characters.

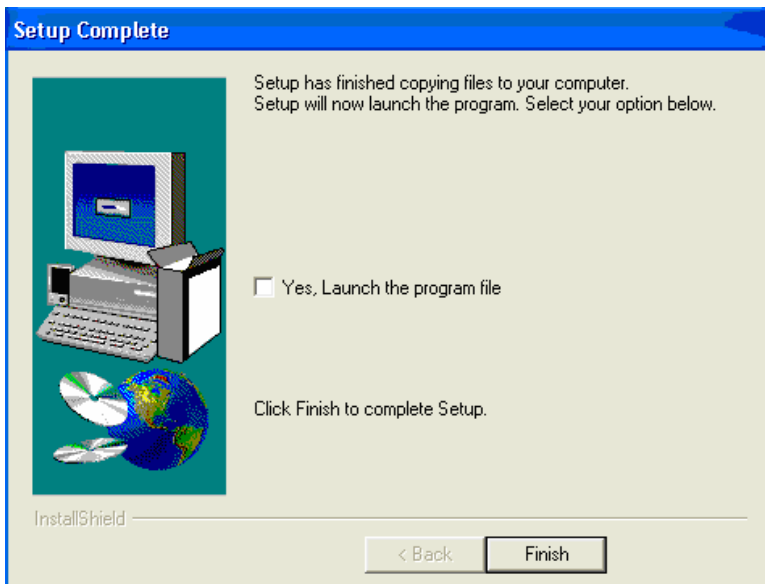
- If you want to change this location click on 'Browse' and select a new location to install to.
- If you want to install to the default location then press 'Next'.
- The next screen you see will display the settings that the installation has detected. If these are correct click on 'Next'. If these are incorrect in any way click on 'Back' and change the relevant settings.



- Trackbase Lite will now begin to install.



11. Once the installation has finished you will see a screen similar to the one below:



Note: Depending on the version of Windows you are using, this screen may vary. On some versions you may be asked at this point if you want to restart Trackbase Lite. If so, please select to Restart the computer.

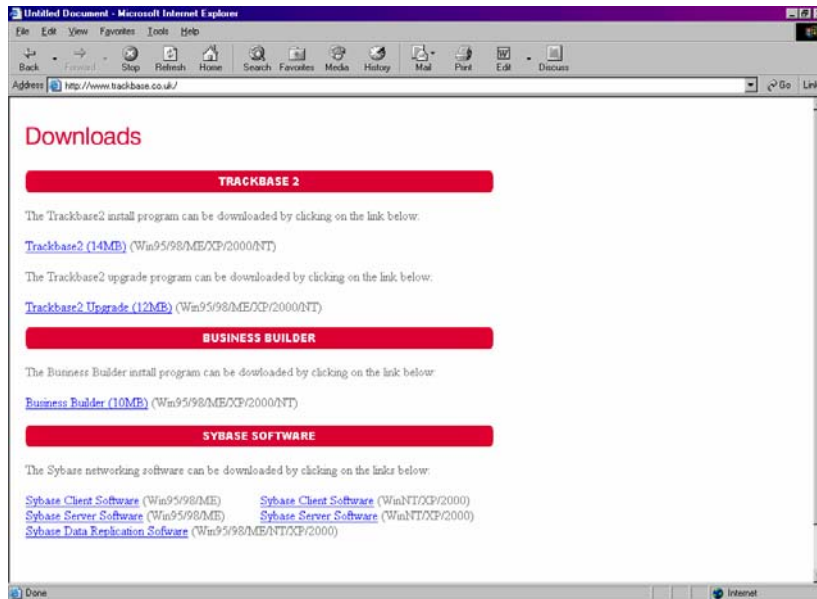
12. Do not click the option to launch Trackbase Lite and click on 'Finish'.
13. The install wizard will close.
14. It is recommended that you restart Windows before using Trackbase Lite for the first time.
15. Once you have rebooted your computer Trackbase Lite can be started by clicking on 'Trackbase Lite' from 'Programs' within your 'Start' menu.

Installing from the Internet

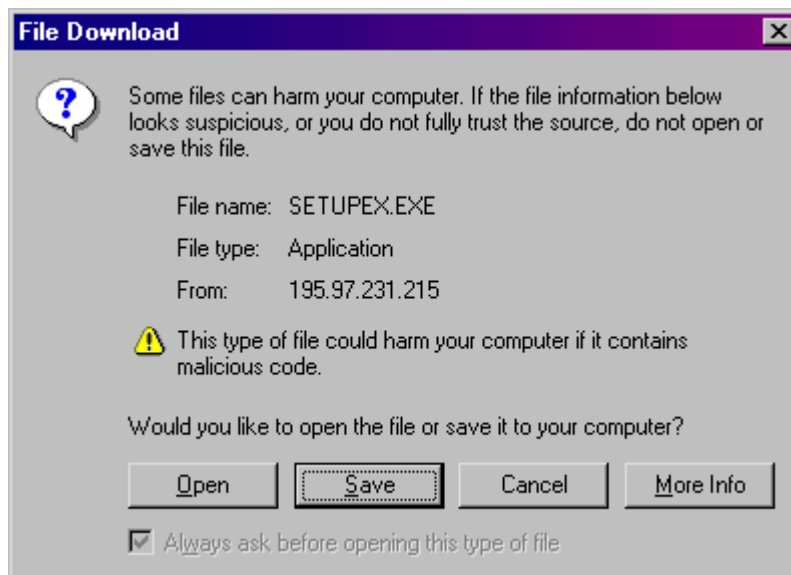
Trackbase Lite can be downloaded and installed from the Trackbase website but this is only recommended if you have a fast internet connection such as broadband, ADSL, ISDN or a leased line. Downloading over a 56k connection is possible but not recommended as the install file is 15MB in size and can take up to 8 hours to download.

To install Trackbase Lite from the website please follow the steps below:

1. Close any programs that you have open.
2. Log onto the internet and go to www.abibuildingdata.com/trackbase.
3. You will see the page shown below:

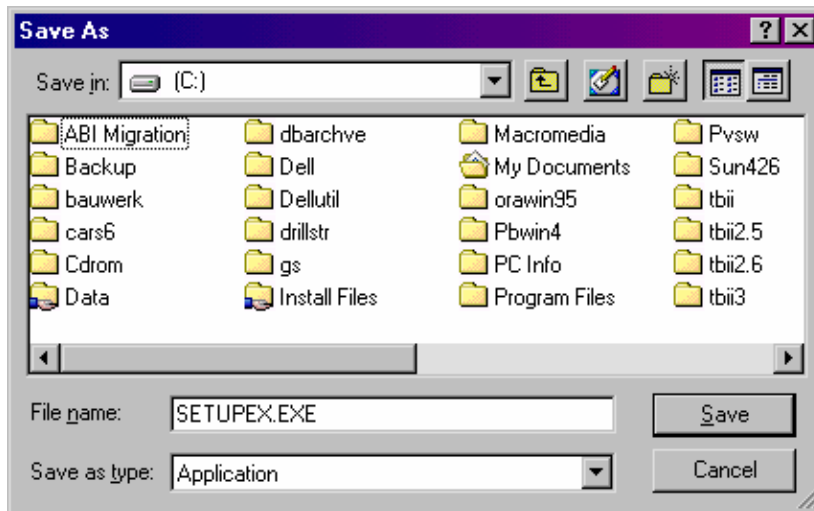


4. Click on the first link on the page, which is for the Trackbase Lite installation file.
5. Depending on the version of Windows you are using, you will see a screen similar to the one below:

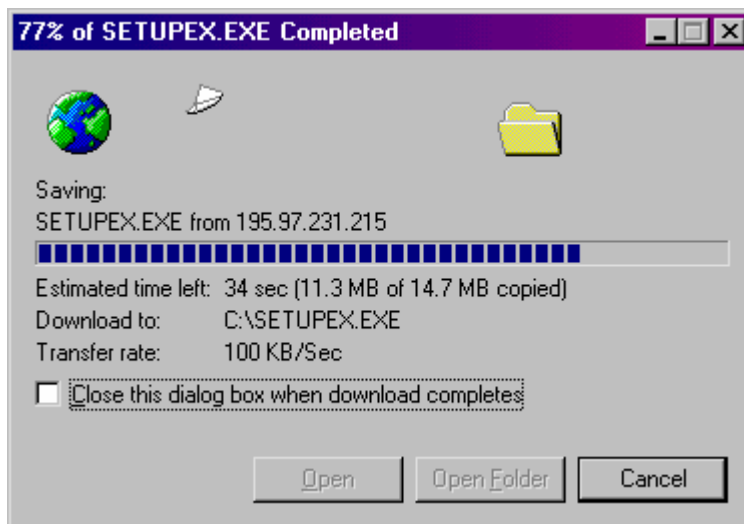


Note: Screens can vary depending on your version of Windows. Whichever screen you see you should have an option to 'Save' or 'Save As'.

6. Click on the 'Save' button.
7. You will then see a screen where you can choose where to download the installation file.



8. Choose a location and click on 'Save'.
9. The file will now begin to download.



10. Once the download has complete you will be given two options. If you want to continue with the installation click on 'Open'. If you want to do it at a later date click on 'Close'.
11. To continue with the installation, please refer back to step 3 within "Installing from CD" section above.

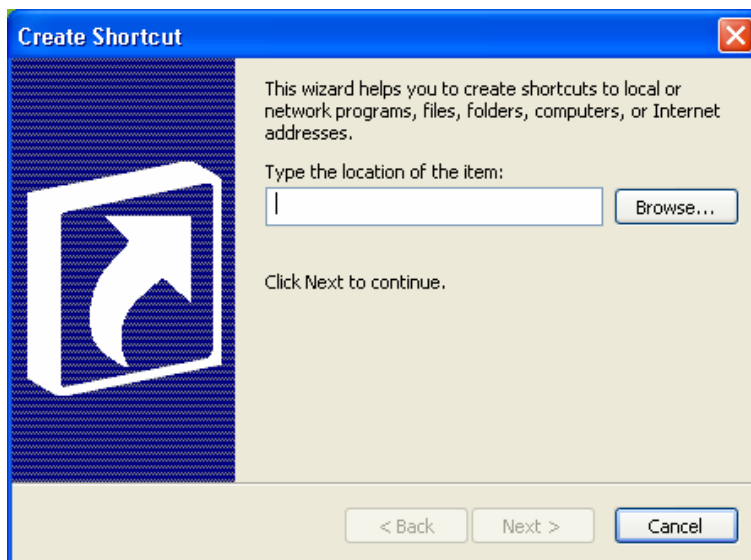
Running Trackbase Lite for the First Time

Opening Trackbase Lite

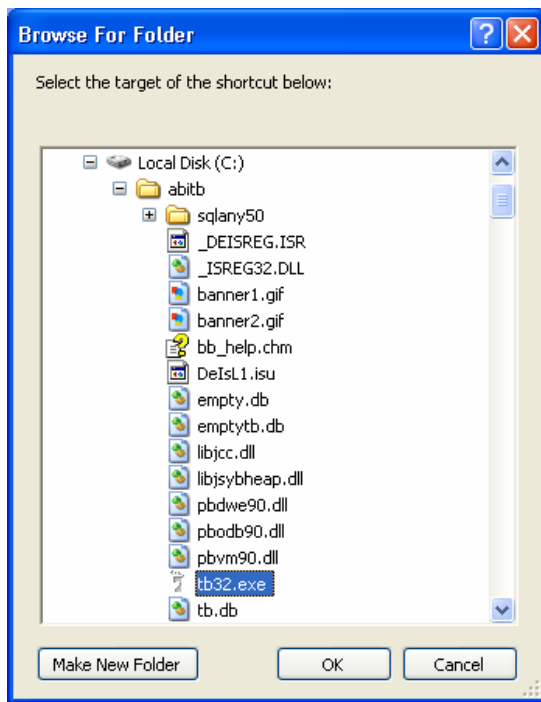
An icon is not automatically placed on your desktop for Trackbase Lite. You can access the program by going to the 'Start' menu and then 'Programs'.

If you wish to have an icon on your desktop please follow the steps below:

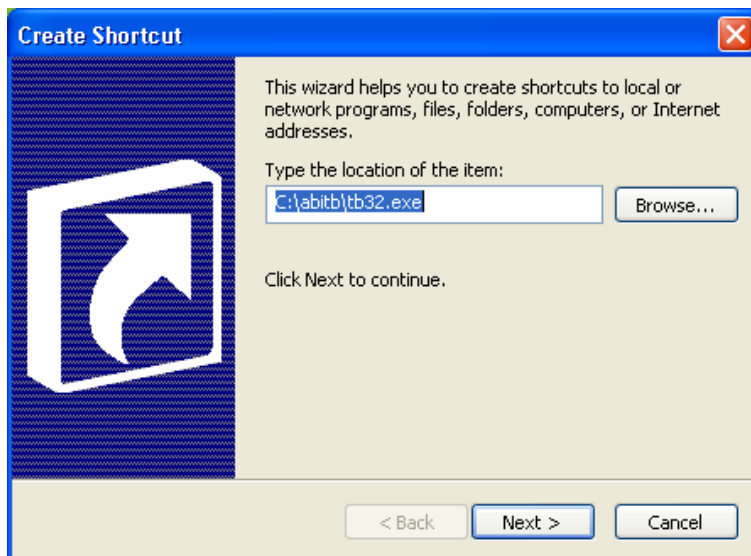
1. Single right click in any blank area on your desktop.
2. On the menu that opens, go to 'New'.
3. Click on 'Shortcut'.
4. You will be given a screen asking you to indicate the location of the program you are creating a shortcut to:



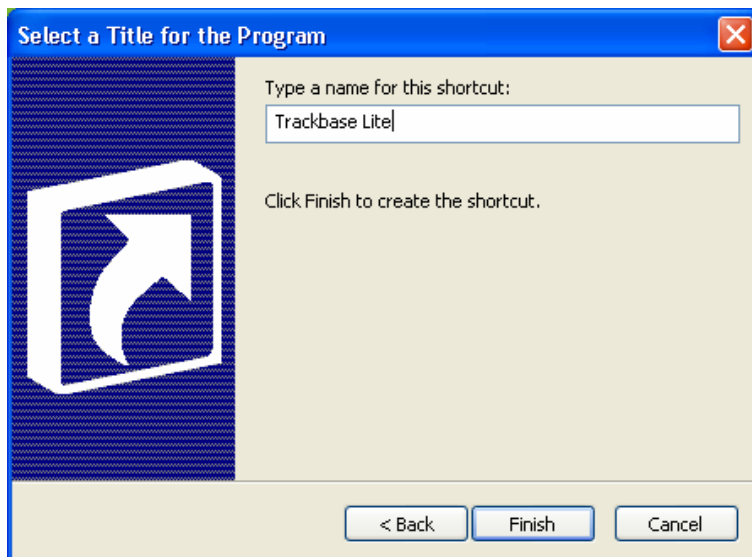
5. Click on the 'Browse' button.
6. You will be shown a browse screen. Go to your C: drive and then into the folder called 'abibt'.
7. Click on the 'TB32.EXE' icon.



8. Click on 'OK'.
9. You will be taken back to the 'Create Shortcut' screen.



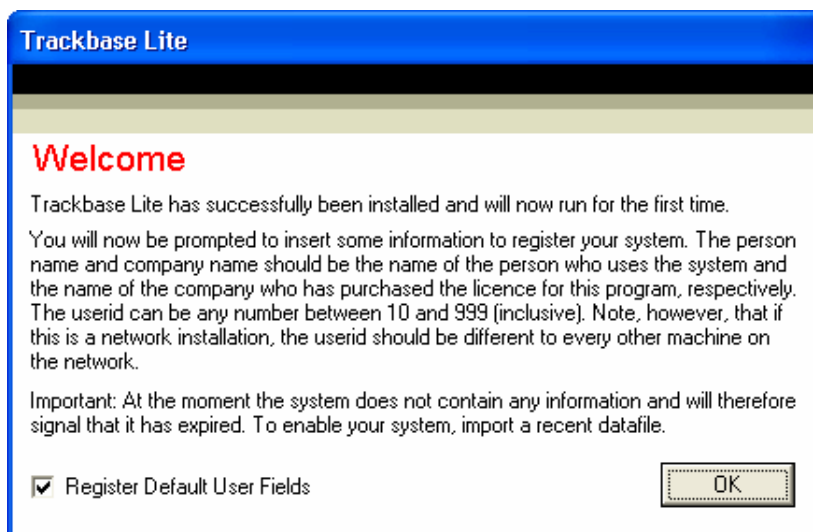
10. Click 'Next'.
11. On the next screen give your shortcut a name.



12. Click on 'Finish'.
13. An icon will now appear on the desktop for Trackbase Lite.
14. Double click this icon to start Trackbase Lite.

Registering Trackbase Lite

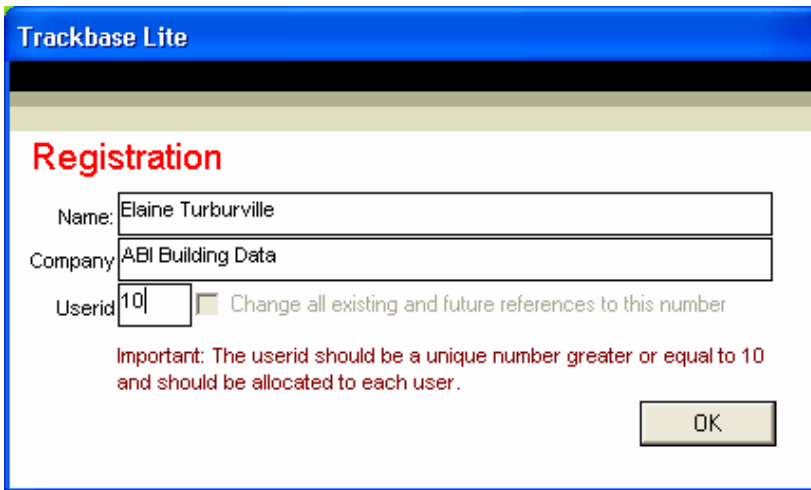
The first time you run Trackbase Lite you will see a Welcome screen. Once you have read this screen, click on 'OK'.



You will then be asked for some registration details. These are for the person who will be using Trackbase.

You will be asked for the following details:

- User Name
- Company Name
- User ID



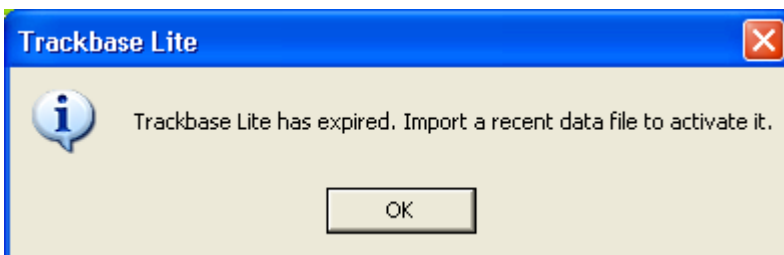
The image shows a 'Trackbase Lite' registration dialog box. It has a blue title bar with the text 'Trackbase Lite'. Below the title bar, the word 'Registration' is written in red. There are three input fields: 'Name' with the text 'Elaine Turburville', 'Company' with the text 'ABI Building Data', and 'Userid' with the text '10'. To the right of the 'Userid' field is a checkbox and the text 'Change all existing and future references to this number'. Below these fields, there is a red warning message: 'Important: The userid should be a unique number greater or equal to 10 and should be allocated to each user.' At the bottom right of the dialog is an 'OK' button.

Fill in all of the details. The User ID number can be any number between 10 and 999.

Note: If you have more than one Trackbase licence it is recommended you choose a different User ID for each user.

Once you have filled in your details click on 'OK'.

You will then see a message saying that 'Trackbase Lite has expired'. This means that your database is currently empty and you need to import some recent data into it to activate.



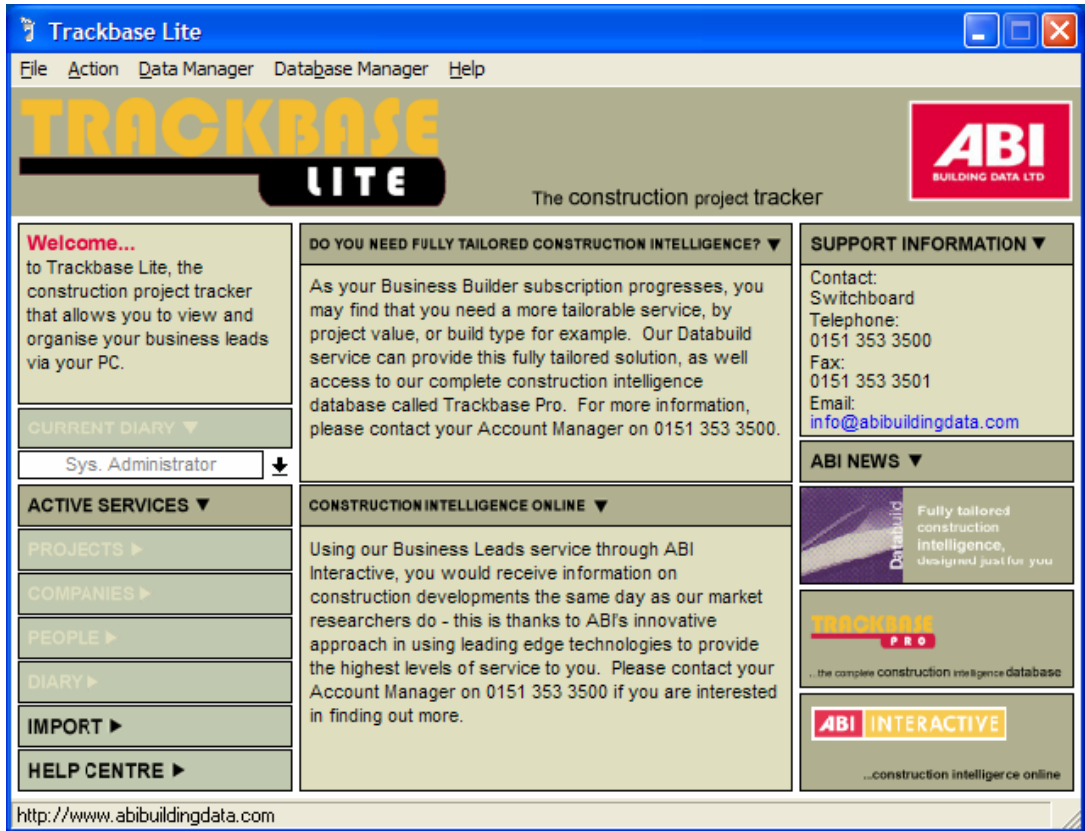
Trackbase Lite Expiry

Trackbase Lite has a built in feature where if you don't import any recent information for more than 5 weeks then the system will expire and lock itself. You WILL NOT lose any information but you will need to import some data that is less than 5 weeks old to reactivate the system.

If your subscription to ABI has expired and you wish to continue using Trackbase Lite please contact your ABI Account Manager on 0151 353 3500 who can discuss this option with you.

Main Menu

The Trackbase Lite Main Menu is the first screen you see every time you open the program. You can access the project information screen and Data import options.



The options are as follows:

Projects

This will open the Projects screen where project information can be viewed and manipulated.

Import

This will allow you to import your information from email, disk or the internet.

Exit

This will allow you to shut down Trackbase Lite.

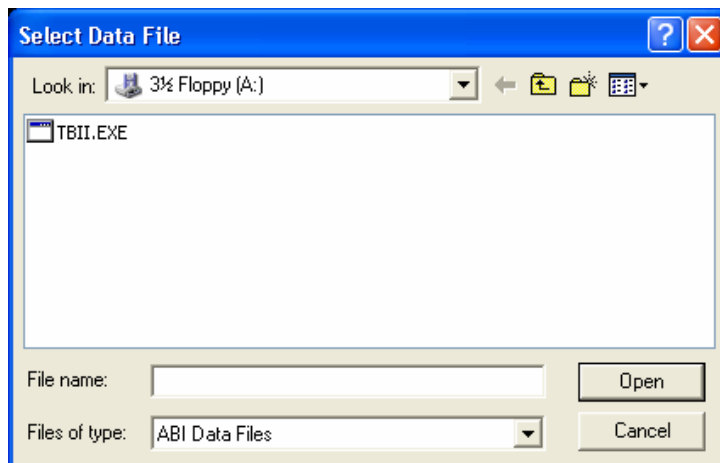
Importing Data

Importing From Floppy Disk

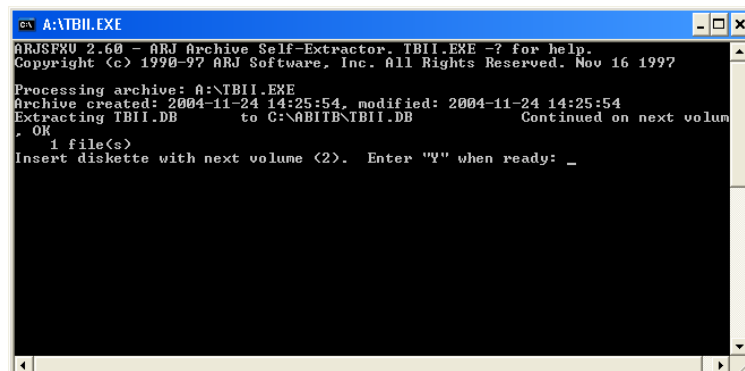
If you have chosen to receive your data via floppy disk then you will be sent a set of one or two disks each week. These disks can then be used to import your weekly new and updated information.

To import your data from floppy disk please follow the steps below:

1. Insert the first disk of the set (if you receive two disks then insert disk 1 of 2 or if it is single disk insert disk 1 of 1).
2. Open Trackbase Lite if it is not already open.
3. Click on the Import button.
4. You will then be shown a 'Select Data File' window:

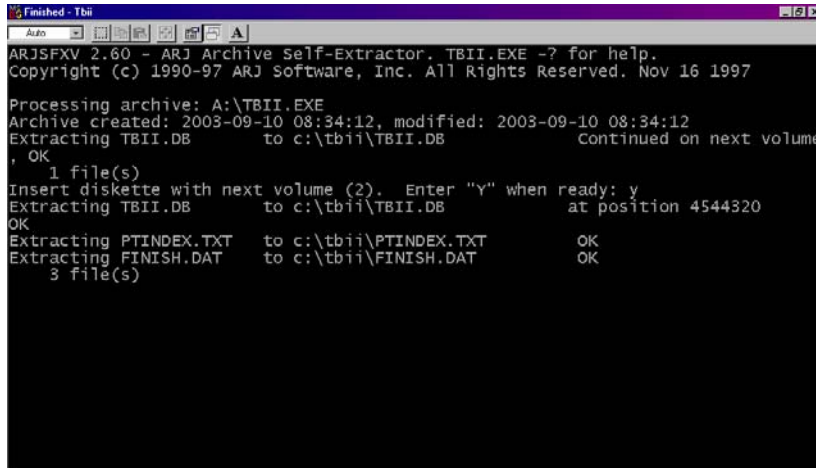


5. It should automatically pick up the floppy disk but if not drop down the 'Look in' box at the top and click on the '3 1/2 Floppy (A:)'.
6. You will see a file called TBII.EXE, click on this file.
7. Click on 'Open'.
8. A black MS-DOS screen will now appear and run through extracting the first disk.
9. If you have a set of two disks, you will see the following message:

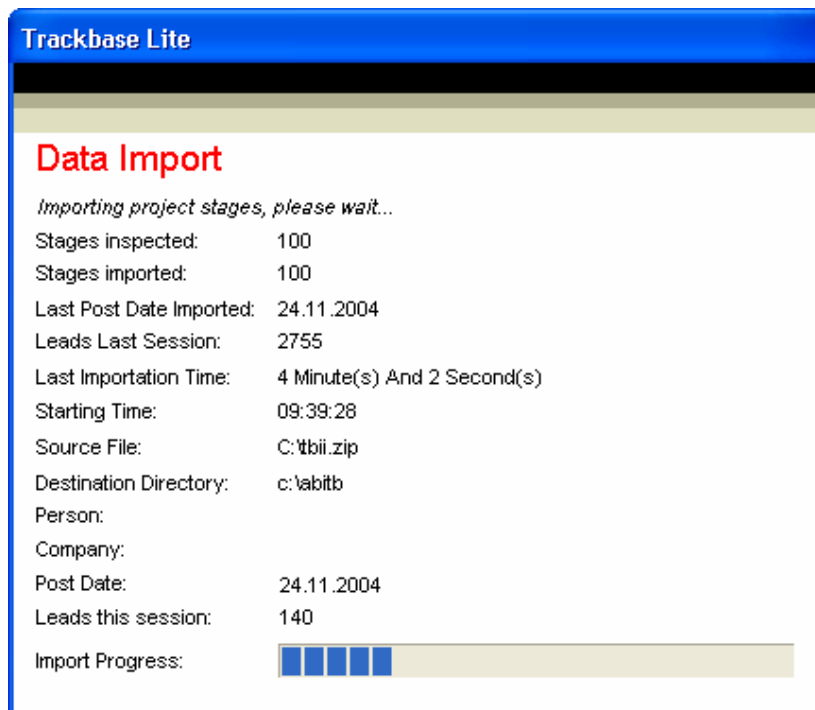


10. Remove the first disk and insert the second.
11. Type 'Y' and then press ENTER.
12. Trackbase Lite will now extract the second disk.
13. If you only have one disk then the extraction will just continue.
14. Once the extraction has completed it will show a message saying 'Finished – Tbi' in the blue bar at the top of the screen.

Note: If you are using Windows 2000 or XP this window will close automatically.



15. You can now close this screen.
16. You will then be shown an import progress screen where Trackbase Lite will show your information being imported.



Note: Depending on the number of projects being imported and the speed of your computer, the data import can take anywhere between 1 minute and 3 hours. During this time your computer may run slowly. It is recommended that you do not try to reboot the computer at any point during an import as this can cause errors in the database. If your PC does crash during import, please contact ABI Technical Support on 0151 353 3500 immediately. The import screen will show as 'Not Responding' during the import.

Once the import process has completed you will be returned to the Main front screen of Trackbase Lite.

Importing From Email

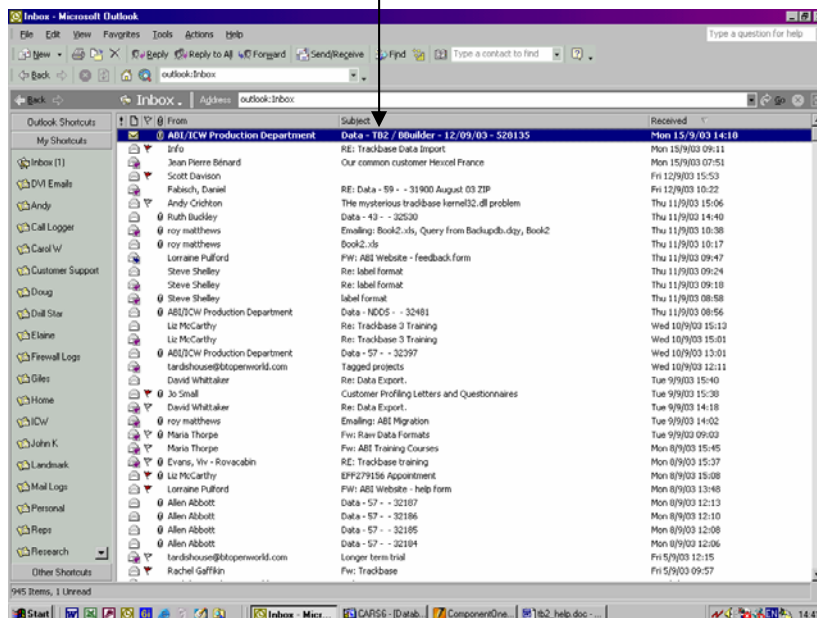
You can also receive your data via email. You will receive one email with an attachment called either TBII.EXE or TBII.ZIP. You may also see a second attachment which will begin with ATT. You can ignore this second file as it is an email use statement.

Many anti-virus scanning applications will now block any attached files with the extension .EXE. The reason for this is that a lot of modern viruses are sent in a .EXE format. If you are having problems receiving your data as an .EXE file please let us know as we can send the data as a .ZIP format which should pass through your anti-virus software and allow you to receive your data.

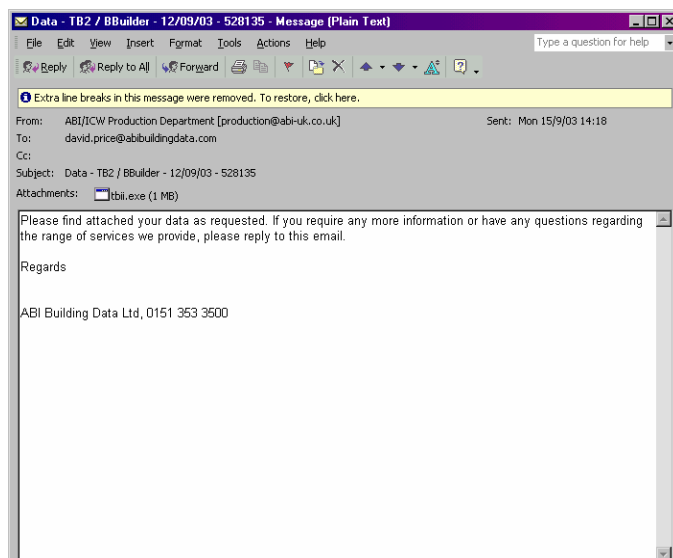
All emails sent by ABI are virus scanned by www.message-labs.com to eliminate the chance of sending out viruses. If you are concerned about any aspect of this please contact ABI Technical Support on 0151 353 3500.

To import your data from email please follow the below steps (example shown is Outlook 2002. If you do not use this program please contact us for further helpsheets):

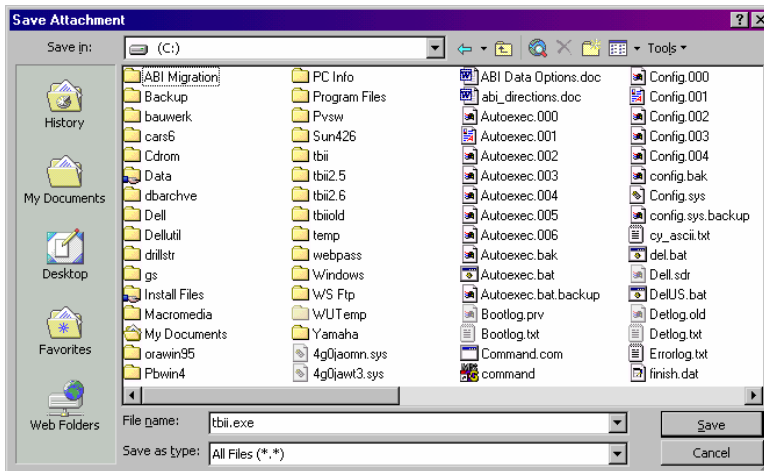
1. Open your email program (i.e. Outlook Express, Outlook or Lotus Notes).
2. Open the email you have received from ABI:



3. You will see the attached TBII file:

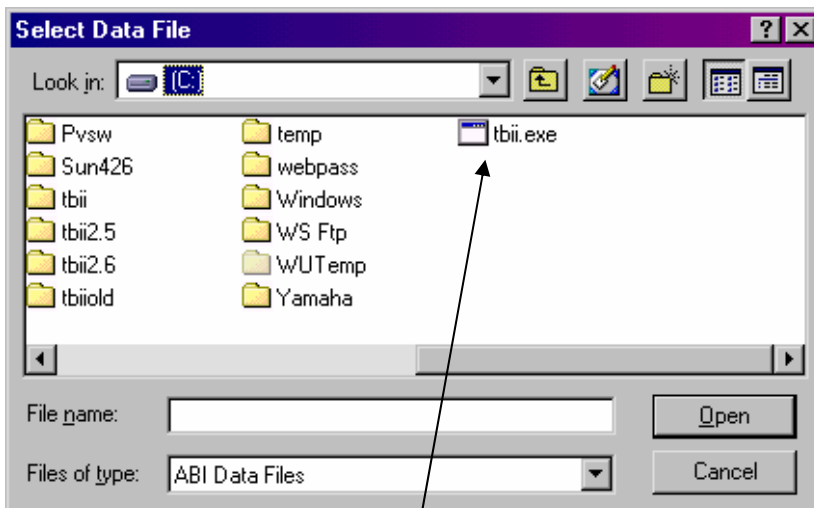


4. Single right click on the attached file to bring up the options menu.
5. Click on 'Save As'.
6. You will then be given a 'Save Attachment' window.
7. Choose a location to save the file to. It is recommended that you save the file directly into your C: drive and not into any folders:

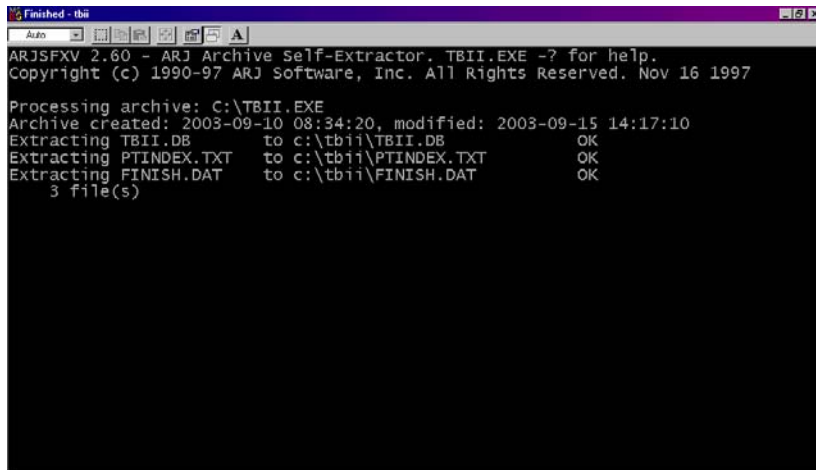


Note: Please do not rename the file as Trackbase Lite will not be able to read it.

8. Click on 'Save'.
9. The window will close. Close the email and minimise your email program.
10. Open Trackbase Lite.
11. Click on the Import button.
12. You will be shown the 'Select Data File' window.
13. Drop down the 'Look in' box at the top and click on your C: drive.



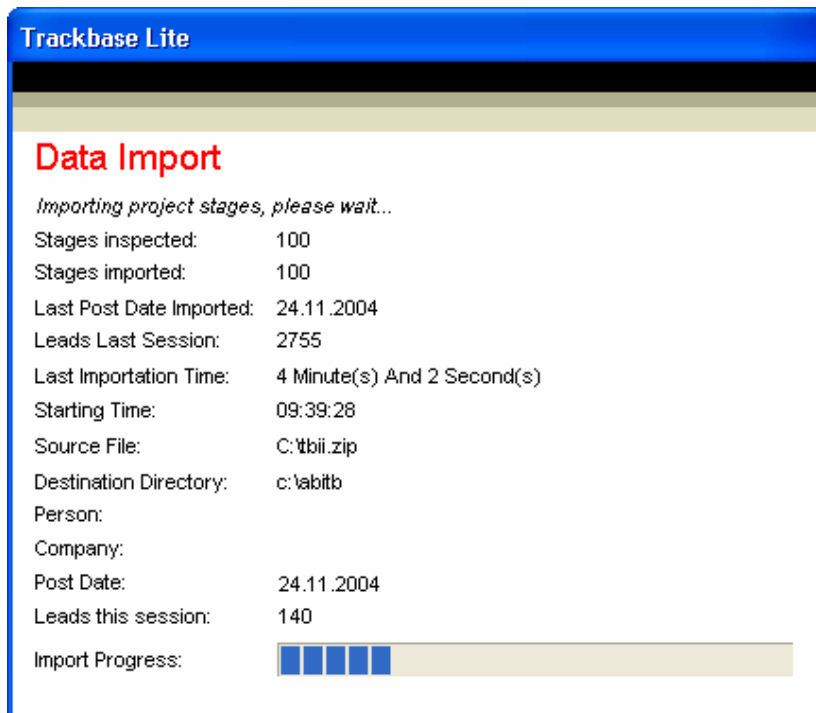
14. You should see the file that you saved (you may or may not see the file extension at the end).
15. Click on this file to select it.
16. Click on 'Open'.
17. You will be given a message stating how long your last import took. If you wish to continue click on 'Yes'. If you want to leave the import until later click on 'No'.
18. Once you click Yes a black MS-DOS screen will appear and will continue to extract the file.
19. Once the extraction has completed you will see a completion message like the one below:



20. Once it says 'Finished – TbiI' in the blue bar at the top you can close this window.

Note: This window will automatically close in Windows 2000 or XP

21. You will then be shown an import progress screen where Trackbase Lite will show your information being imported.



Note: Depending on the number of projects being imported and the speed of your computer, the data import can take anywhere between 1 minute and 3 hours. During this time your computer may run slowly. It is recommended that you do not try to reboot the computer at any point during an import as this can cause errors in the database. If your PC does crash during import, please contact ABI Technical Support on 0151 353 3500 immediately. The import screen will show as 'Not Responding' during the import.

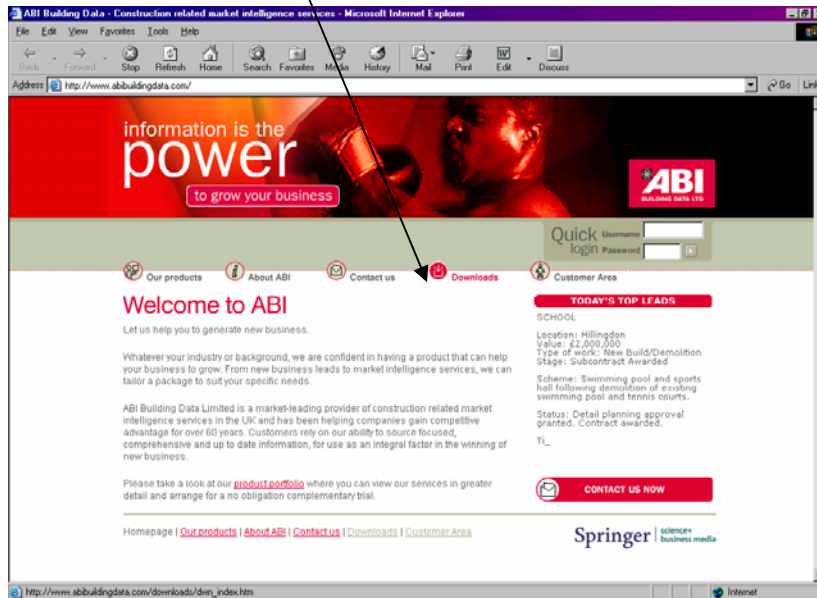
Once the import process has completed you will be returned to the Main front screen of Trackbase Lite.

Importing From the Internet

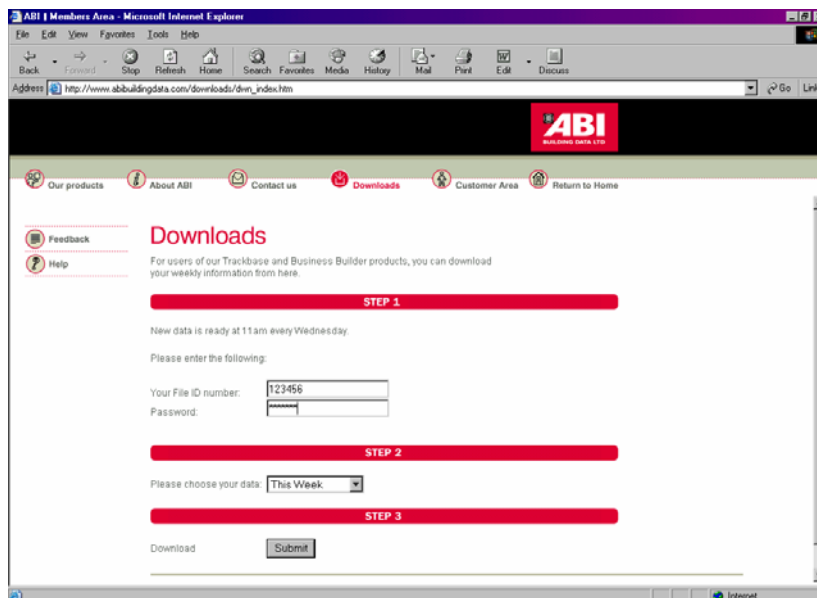
The third option for getting your data into Trackbase Lite is to import it from the ABI website. Please contact your ABI Account Manager to obtain your username and password on 0151 353 3500.

To download and import your data from the web, please follow the below steps:

1. Open your web browser (i.e. Internet Explorer or Netscape).
2. Go to the website www.abibuildingdata.com.
3. Click on the Downloads button (*the quick log in section is for Interactive users only and cannot be used to access your Trackbase Lite data*).



4. You will be taken to a log in page.

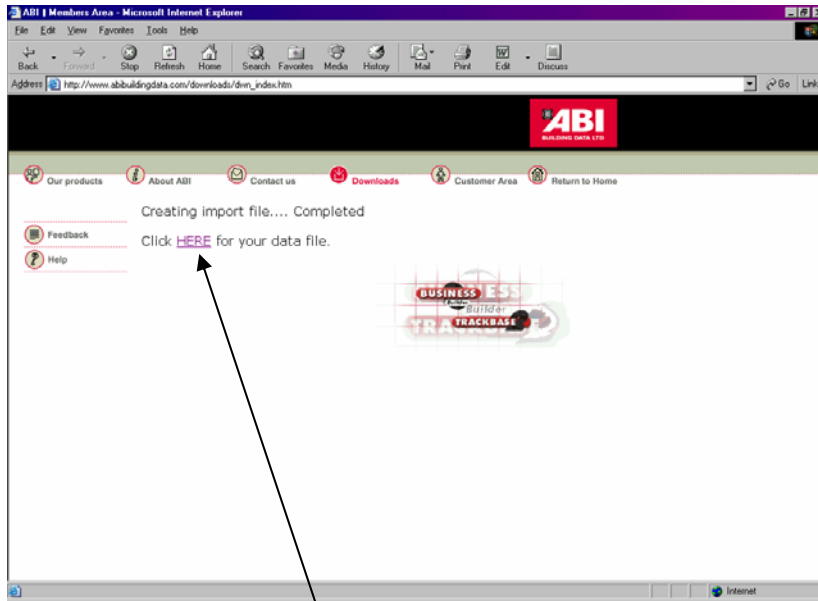


5. Type in your File ID number (this will be your 6 digit number).
6. Next type in your password.
7. Under step 2 select the week you require.

Note: Data is uploaded every Wednesday morning and will be available for download by 11am.

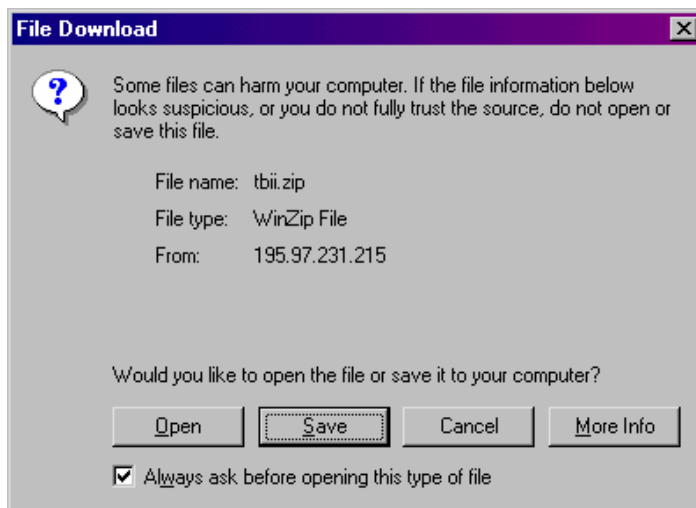
8. Click on 'Submit'.

9. You will then be taken to a screen where you can download your file from:



10. Click where it says 'HERE' to download your file.

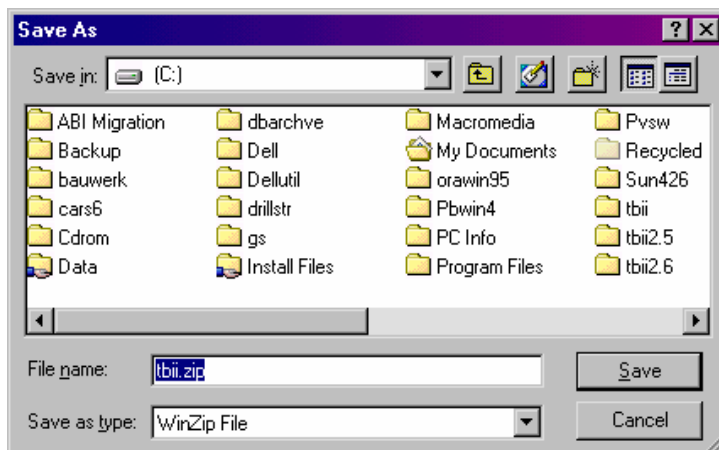
11. Depending on the version of Internet Explorer or Netscape you are using you will get a screen similar to the one below:



12. Click on the 'Save' button.

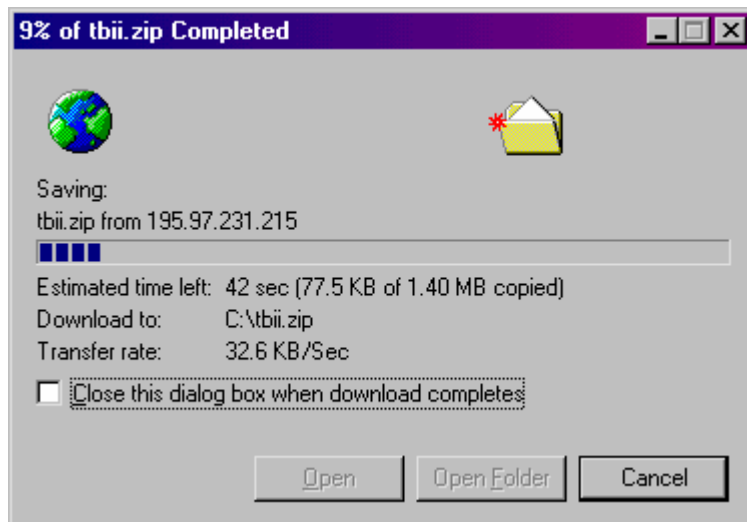
13. Next you will be shown the 'Save As' window.

14. It is recommended that you download the file into the root of your C: drive and not into any folders.



15. Once you have selected your download location click on 'Save'.

16. The download will now begin:



Note: On average file sizes are around 1.5MB in size. On a normal 56kb dial up connection this could take approximately 20-30mins to download.

17. Once the download has completed, click on the 'Close' button.

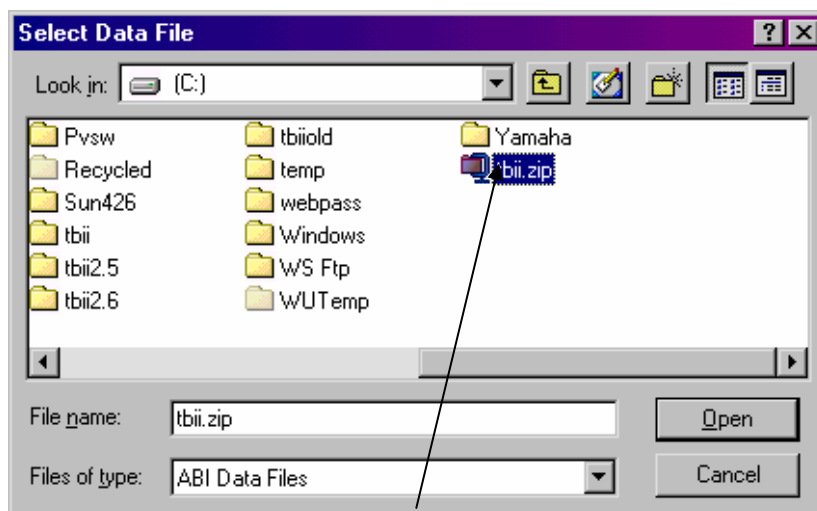
18. Close the Internet.

19. Open Trackbase Lite.

20. Click on the Import button.

21. You will be shown the 'Select Data File' window.

22. Drop down the 'Look in' box at the top and click on your C: drive.



23. You should see the file that you saved (you may or may not see the file extension at the end).

24. Click on this file to select it.

25. Click on 'Open'.

26. You will be given a message stating how long your last import took. If you wish to continue, click on 'Yes'. If you want to leave the import until later, click on 'No'.

27. Once you click 'Yes' a black MS-DOS screen will appear and will continue to extract the file.

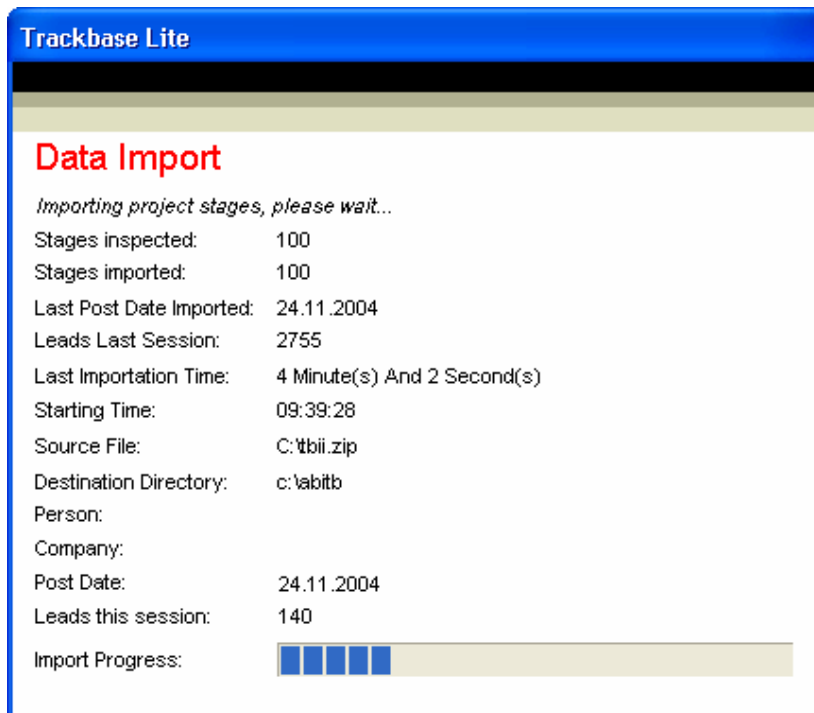
28. Once the extraction has completed you will see a completion message like the one below:

```
Finished - tbii
Auto
ARJSFXV 2.60 - ARJ Archive Self-Extractor. TBII.EXE -? for help.
Copyright (c) 1990-97 ARJ Software, Inc. All Rights Reserved. Nov 16 1997

Processing archive: C:\TBII.EXE
Archive created: 2003-09-10 08:34:20, modified: 2003-09-15 14:17:10
Extracting TBII.DB to c:\tbii\TBII.DB OK
Extracting PTINDEX.TXT to c:\tbii\PTINDEX.TXT OK
Extracting FINISH.DAT to c:\tbii\FINISH.DAT OK
3 file(s)
```

Note: This window will automatically close in Windows 2000 or XP.

29. Once it says 'Finished – TbiI' in the blue bar at the top you can close this window.
30. You will then be shown an import progress screen where Trackbase Lite will show your information being imported.



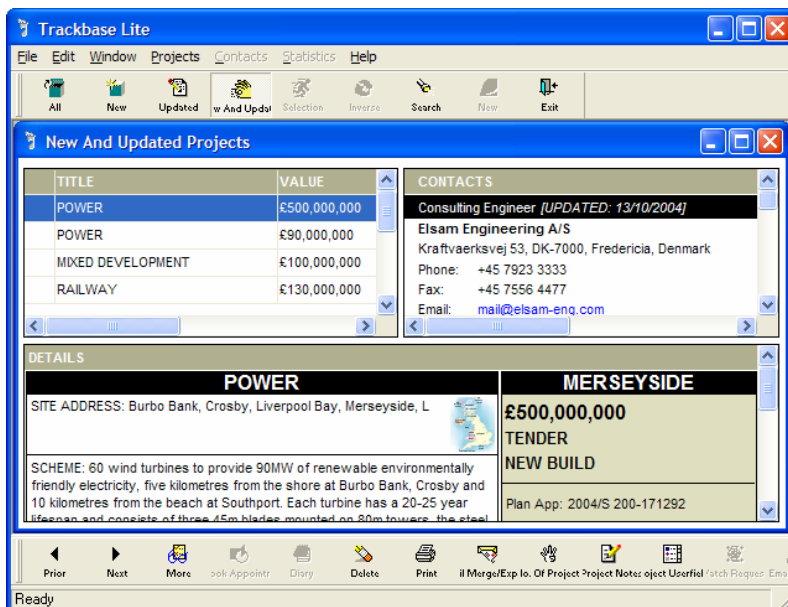
Note: Depending on the number of projects being imported and the speed of your computer, the data import can take anywhere between 1 minute and 3 hours. During this time your computer may run slowly. It is recommended that you do not try to reboot the computer at any point during an import as this can cause errors in the database. If your PC does crash during import, please contact ABI Technical Support on 0151 353 3500 immediately. The import screen will show as 'Not Responding' during the import.

Once the import process has completed you will be returned to the Main front screen of Trackbase Lite.

The Project Screen

Viewing Projects

The projects screen is split into three main segments. These are the project summary, associated contacts and project details segments.



There are four different modes of view for looking at projects. These can be accessed from the top tool bar and are:

View All 

This will display every project you have in your system so far.

View New 

This will display just the new projects you have imported from your last data file.

View Updated 

This will show you projects that are already on your system and have been updated by the latest data import.

View New & Updated 

This will show you a combination of both the new and the updated projects imported from your last data file.

Clicking one of these buttons will display a list of projects in the top left box. This is a summary view:

TITLE	VALUE
FLATS/SHOP/RESTAURANT	£1,000,000
SERVICE STATION/HOTEL/RESTAUR.	£2,500,000
ROAD	£7,000,000
HOUSING	£2,350,000

As you scroll across you will see the following columns:

Title

This is the title of the project.

Value

This is the overall value of the project.

Location

This is the planning office location for the project.

Stage

This will tell you the project's current stage (i.e. detail planning, contract awarded, etc).

Reported

This is the date the project was first reported on by ABI.

ID

This is the unique project ID number assigned to every project by ABI.

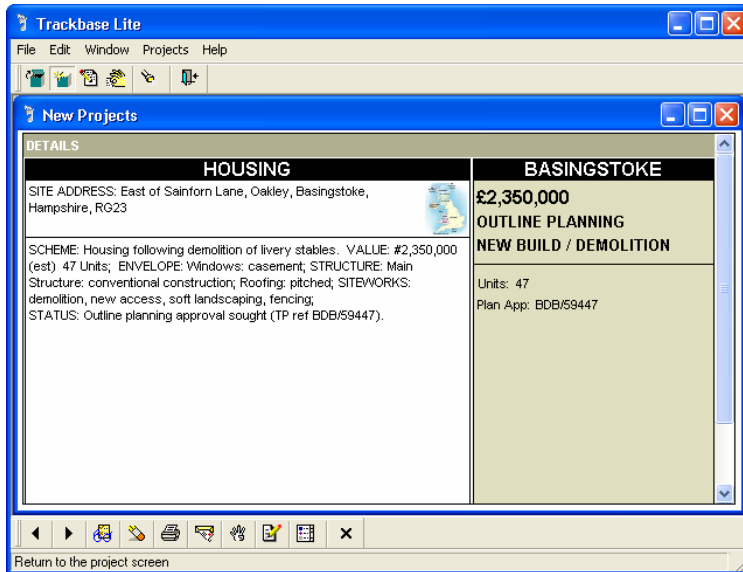
To view more information about a project, double-click on the project title. This will display information in the other two boxes. The top, right-hand box will display any contacts associated with the project. The bottom half of the screen will show you further details about the project, such as description, development type and site address.

The screenshot shows the Trackbase Lite application window. The main area is divided into three sections:

- Table:** A table with columns 'TITLE' and 'VALUE'. The 'HOUSING' row is selected, showing a value of £2,350,000.
- CONTACTS:** A list of contacts for the selected project. The first contact is 'TJ Lowery Builders Limited' with address 'Riverside View, Basing Road, Old Basing, Basingstoke, H', phone '01256 465601', and fax '01256 465601'.
- DETAILS:** A section with two columns: 'HOUSING' and 'BASINGSTOKE'.
 - HOUSING:** SITE ADDRESS: East of Sainforn Lane, Oakley, Basingstoke, Hampshire, RG23. SCHEME: Housing following demolition of livery stables. VALUE: #2,350,000 (est) 47 Units; ENVELOPE: Windows: casement; STRUCTURE: Main Structure: conventional construction; Roofing: pitched; SITEWORKS: demolition, new access, soft landscaping, fencing; STATUS: Outline planning approval sought (TP ref BDB/59447).
 - BASINGSTOKE:** £2,350,000, OUTLINE PLANNING, NEW BUILD / DEMOLITION, Units: 47, Plan App: BDB/59447.

The Project Fields

The fields that can be viewed in the bottom half of the project window are listed as follows:



Project Title

This is a brief description of the project.

Site Address

This is the site address of the project.

Project Description

A full description of the project including any materials used, the scheme, completion date, start date, status and development type.

Reported

This is the original report date of the project.

Updated

The date of the last time the project was updated. On new projects this date will be the same as the Reported date.

Location

This is the planning office location for the project.

Value

This is the overall value of the project.

Stage

The project's current stage e.g. Detail Planning, Contract Awarded, Tender, etc.

Development Type

This is the development type of the project e.g. new build, demolition, refurb, etc.

ABI Reference

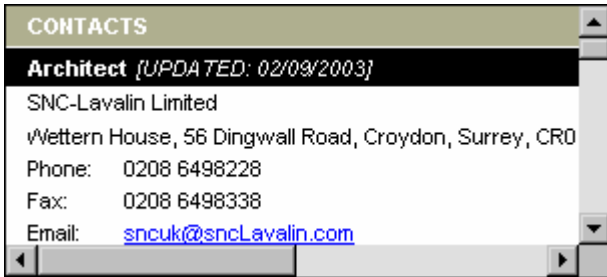
The unique ID number assigned to every project that ABI reports on. The ID number is comprised of 2 different numbers. The first is the project ID number and the second, which is separated by a hyphen, dictates whether it has been sent by ABI or has been added by a user.

Note: Projects sent by ABI will have a trailing 0 or 1 whilst projects added by yourself will have a trailing number equal to or greater than 10.

Contacts

Any contact associated with the project is displayed in the top right box on the screen. This window is scrollable so to allow you to look through all of the associated contacts in one screen.

You will be able to see details such as the contacts role on the project, the company name, company address, any company email addresses, their phone numbers and fax numbers.



The Project Menu Bar

The menu bar at the bottom of the projects screen is where you can access some of the more advanced features of Trackbase Lite. It can be used to do various different functions such as mail merge, printing and making notes.

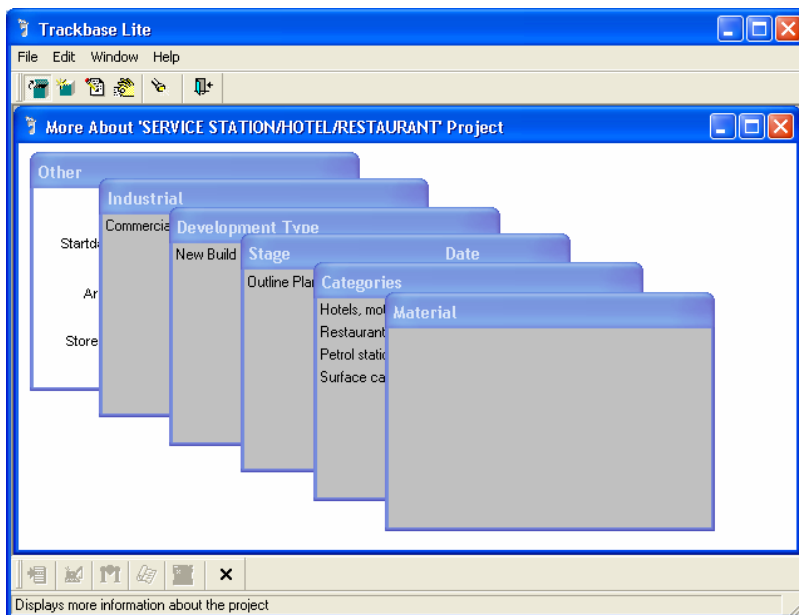
Below is a brief description of each feature:

Project Scroll 

Scroll between projects using these back and forward scroll buttons.

More 

By clicking this icon you can see a break down of all the project details.



The details you can view are:

Industrial Category: This describes the industrial sector in which the building is involved e.g. 'Commercial' or 'Residential'.

Categories: This describes the function of the building e.g. 'Shopping Centres'.

Development Type: This is the type of work being carried out on the project e.g. 'New Build' or 'Demolition'.

Stage: This indicates the stage the project is at e.g. 'Tender' or 'Detail Planning'.

Materials: This lists any materials that may be used on the project.

Start Date: This is the start date for construction.

Close Date: This is the closing date for tenders.

Area: This is the site area in square metres.

Units: The number of units within the building(s) or the number of buildings.

Storeys: The number of storeys within the building.

Delete 

This button allows you to delete projects from your database. Please see the section 'Deleting' for information on how to use this feature.

Print 


This allows you to print off project information in a range of different formats. You can also export your data to PDF format using the print option. Please see the section 'Printing' for information on how to use this feature.

Mail Merge/Export 

You can export your data from Trackbase Lite by using the mail merge and export feature. You can then create mailing letters, labels, envelopes etc from the exported information. Please see the section on 'Mail Merge/Export' for information on how to use this feature.

Project Count 

Clicking this button will count all of the projects in your current view

Project Notes 

This option allows you to add notes to a project that can then be viewed at a later date or printed. Please see the section on 'Project Notes' for a description on how to use this.

Project User Fields 


This option allows you to add up to three User Fields to individual projects. Please see the section covering 'User Fields' for a description on how to use this feature.

Close 

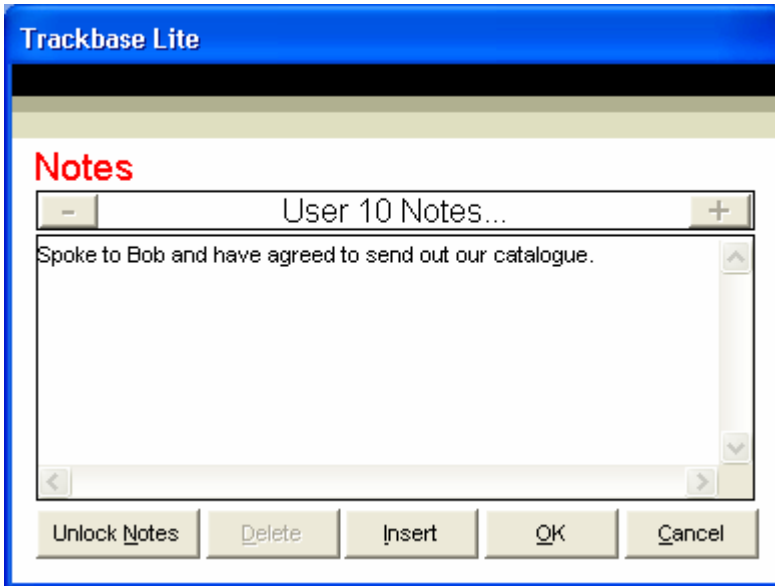
This button will close the current screen.

Project Notes

Each project has a notes section where you can add your own personal notes. You can add up to 32,767 characters (any characters e.g. numeric, symbol, spaces and carriage returns can be used).

The project notes can be accessed by clicking on the project notes button  on the bottom toolbar.

You will see a screen like the one below where you can enter your required details:



- Unlock Notes: You can unlock notes that you may have been working on when the system last closed abnormally.
- Delete: This will remove the current set of notes.
- Insert: This will allow you to insert a new set of user notes.
- Cancel: This will close the window without saving any changes.
- OK: This will save any changes and close the window.

Trackbase Lite Tip: You can have your notes automatically pop-up when you view a project by changing the system settings. From the Main Menu, go to the 'Data Manager' menu and click on 'System Settings'. Click on the 'Notes & Userfields' tab and click on 'Automatically Open Active Notes'.

Deleting Projects

You can delete projects in three different ways. You can either delete all projects, individual ones or highlighted projects.

To delete projects you can use the delete button  on the bottom toolbar.

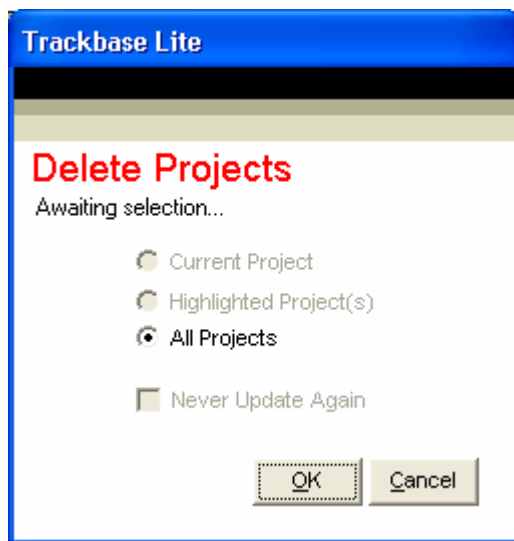
To delete multiple projects follow the below steps:

Deleting Groups of Projects

1. Create a selection to find the projects you no longer wish to have in your database.

Note: Searching on the project update date will normally bring up the best results for deleting. Searching on update date will allow you to find projects that haven't been updated in a long time.

2. Click on the delete button  on the bottom toolbar:



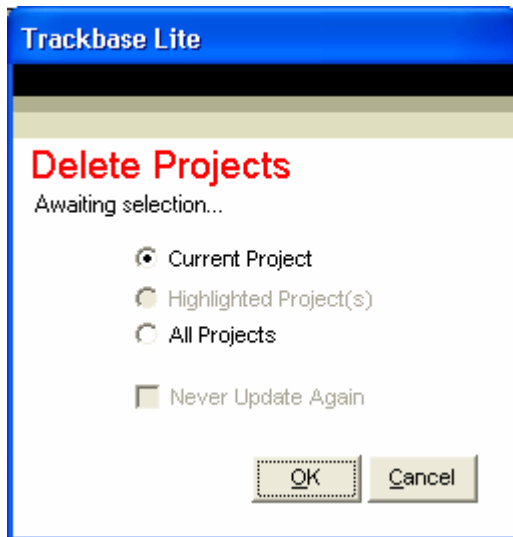
3. If you have not double-clicked on a project from the open selection, the 'All Projects' item will be selected by default.
4. The 'Never Update Again' option is only available in Trackbase Pro.
5. Click on 'OK'.
6. Trackbase will now go through your database and delete all the projects selected.

Note: It takes roughly the same amount of time to delete a project as it does to import one. If you are deleting a large amount of projects it is recommended you contact ABI first on 0151 353 3500.

Deleting Individual Projects

To delete individual projects, follow the below steps:

1. Bring up the list of projects on screen.
2. Double click the project you wish to delete.
3. Click on the 'Delete' button on the bottom toolbar.



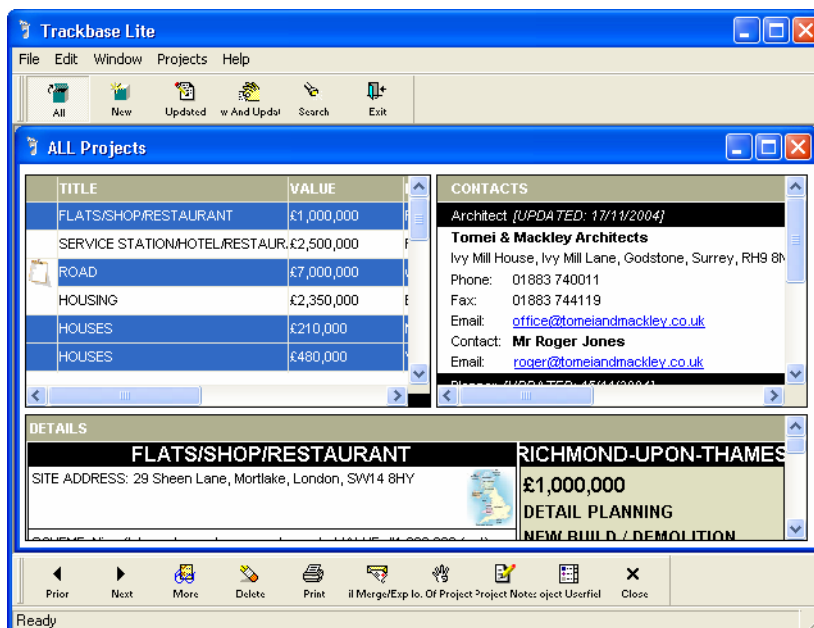
4. Make sure that 'Current Project' is selected.
5. Click on 'OK'.

Deleting Highlighted Projects

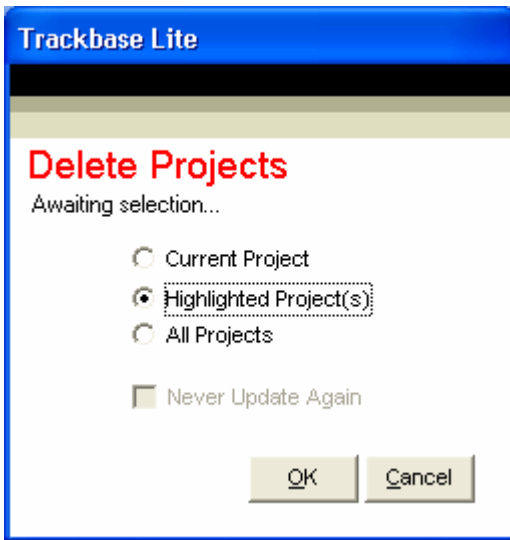
You can delete several projects at once by using the highlight function. By default, row highlighting should be turned on. If it is not enabled, go to the Trackbase Lite Main Menu, click on 'Data Manager' and click on 'System Settings'. When the System Settings window opens, place a tick in the check box next to 'Row Highlighting' to enable this feature. Click on 'Apply' and then 'OK'.

To delete highlighted projects follow the below steps:

1. Open your list of projects.
2. Single left-click on the first project you want to delete.
3. Hold down the CTRL key on your keyboard and single left-click on the next project you want to delete.
4. Continue holding down CTRL and clicking on the projects you wish to delete. Highlighted projects will be displayed with a blue background.



5. Click on the 'Delete' button  on the bottom toolbar.




6. By default 'All Projects' will be selected. Click on 'Highlighted Project(s)'.
7. Click on 'OK' to begin the deletion.


Trackbase Lite Tip: You can also delete groups of projects using the highlight function. Instead of using CTRL you can use SHIFT to select a group. To do this click on the first project on the list, scroll down to the last project you want to select, hold down SHIFT and click on the last project. This will highlight all of the projects between the two you have selected.

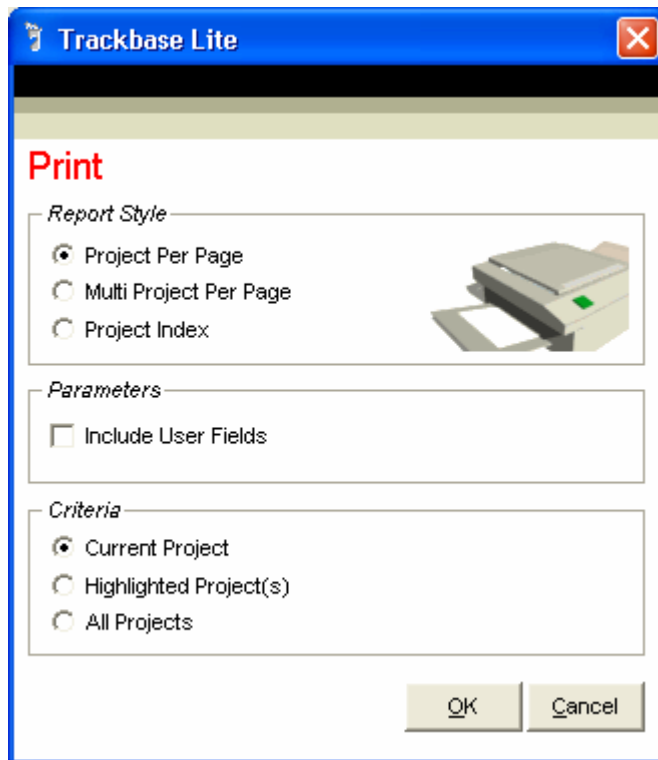
Printing Reports

Trackbase Lite allows you to print various reports, which can show different levels of information about the project. You can choose from 'Project Per Page' where you can print one project per A4 page and select to include all available details about the project. The next report is 'Multi-project Per Page' where you can print more than one project per page and select to include all available details about the project. The last report is 'Project Index'. This gives you a brief overview of the project providing you with information such as project title, project number, location, value, User Fields and stage.

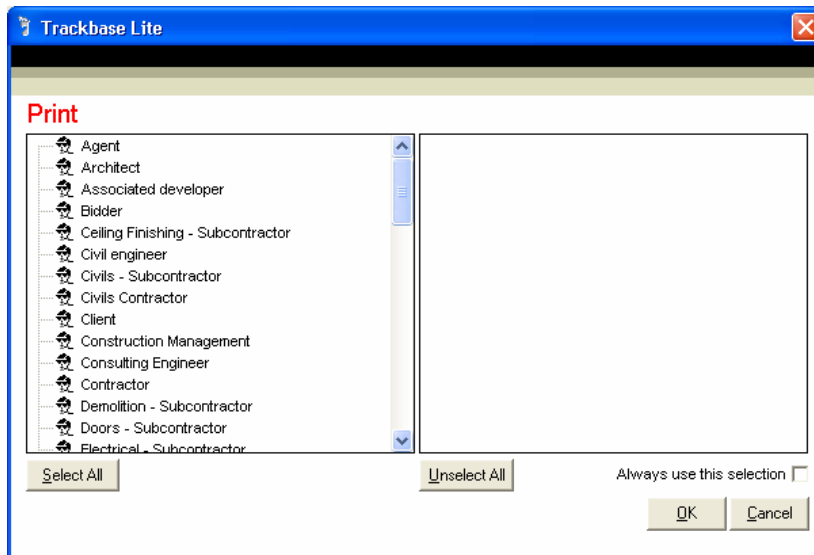
The print screen can be accessed using the print button  on the bottom toolbar.

To print projects follow the below steps:

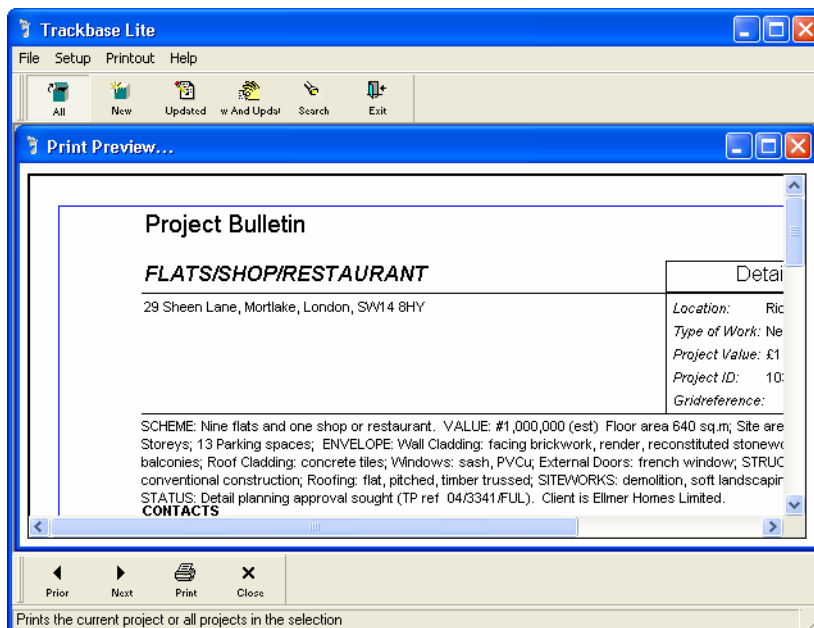
1. Either select individual projects or open a selection of projects on screen that you wish to print.
2. Click on the print button  on the bottom toolbar.
3. You will see the 'Print' screen.




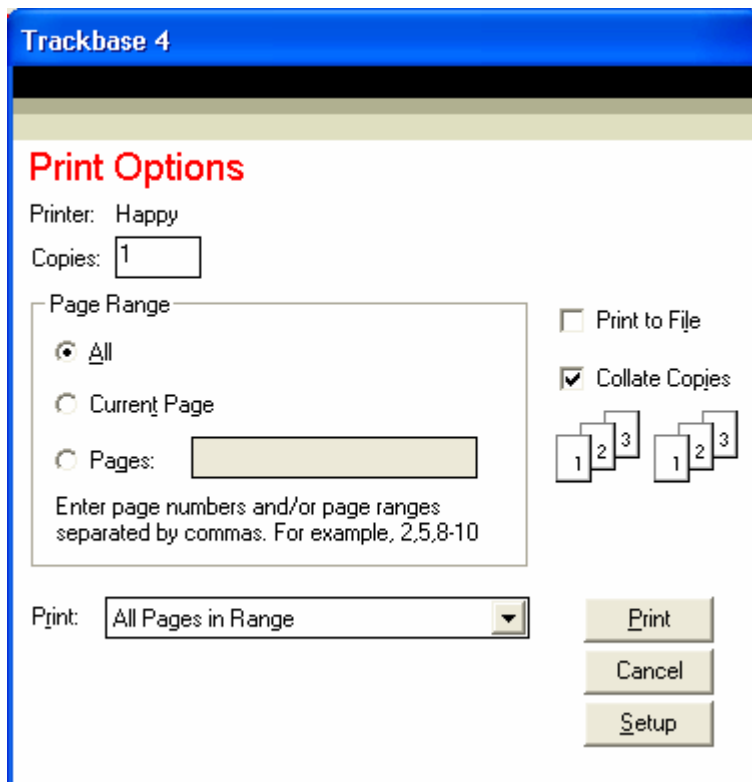
4. Select the report style you wish to use.
5. In the 'Parameters' section, select if you wish to include any User Fields.
6. In the 'Criteria' section select which projects you want to print. If you only want to print one project click on 'Current Project'. To print a selection of projects click on 'All Projects' or use the 'Highlighted Project(s)'.
7. Click on 'OK'.



8. The next screen will ask you which contacts you want to print with the project. If you do not want to print any contacts click on the 'OK' button without selecting anything.
9. If you wish to print contacts, select them from the list on the left by single-clicking on the Role. Any contacts you choose will be displayed on the right hand side of the screen.
10. If you want to print all contacts click on the 'Select All' button.
11. You can also select the 'Always use this selection' option so that Trackbase Lite will remember the roles you select for the next time you use it.
12. Once you have chosen your contacts, click on the 'OK' button.
13. Trackbase Lite will now generate a print preview.



14. To print this straight away, click on the 'Print' button  on the bottom toolbar.
15. The Print Options window will open.



16. Click on 'Print' to produce the report.

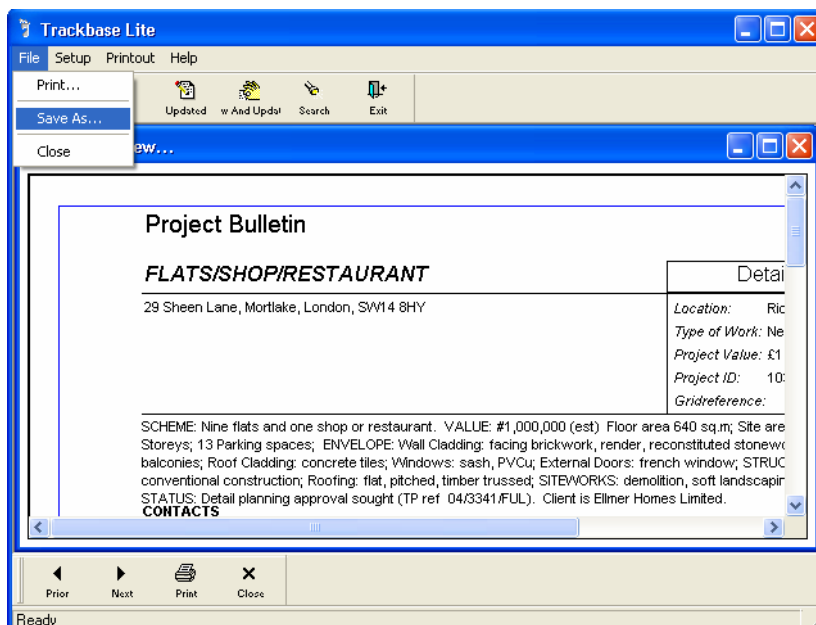
17. Once Trackbase Lite has finished printing the report, you will be returned to the project screen.

Printing to PDF format

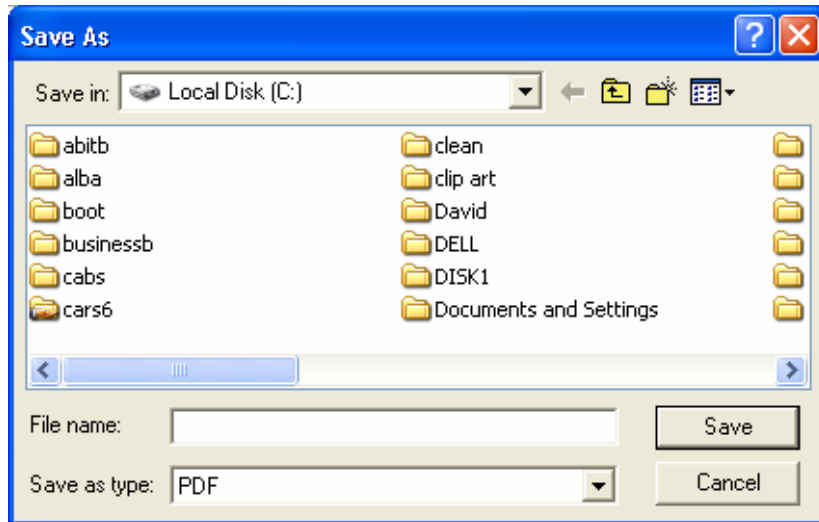
As well as printing out on paper you can also print the projects electronically in Adobe PDF format. This will then allow you to email groups of projects to other people who don't have Trackbase Lite.

To print to PDF format follow the steps below:

1. Refer to steps 1 to 13 under 'Printing Reports' to create the preview of projects you wish to print to PDF.
2. When you have the print preview on screen, click on 'File' at the top left of the screen and click on 'Save As' from the menu that opens.



3. The 'Save as' window will open:



4. Select the location you wish to save the file to.
5. Name the file you are saving by typing it into the 'File name' box.
6. Click on 'Save'.
7. Trackbase Lite will now generate the file. A message box will be displayed once the report has been generated.
8. You can now attach this saved file to an email and send it to a colleague.

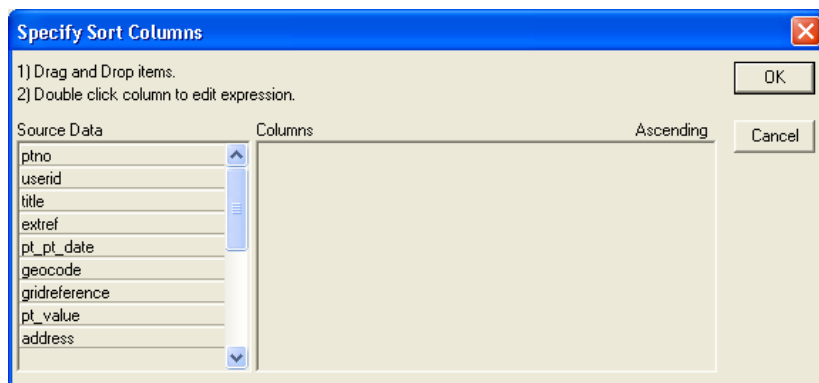
Note: Adobe Acrobat Reader is required to view these files. If you are using Windows 95/98 or ME additional software will be required to use this feature. For further assistance, please contact ABI Technical Support on 0151 353 3500.

Ordering Your Printout

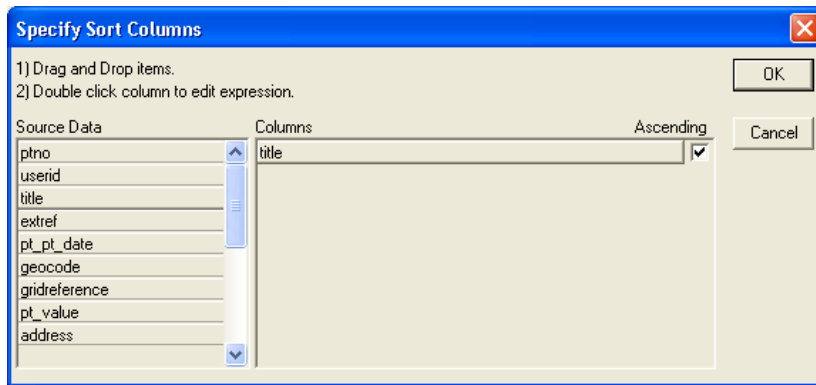
It is possible to order the selected projects by certain criteria prior to print out. You can order the projects via project number, project value, address, project title, etc.

To order your printout, follow the steps below:

1. Open your selection and follow the printing steps until you have the print preview on screen.
2. Click on 'setup' at the top left of the screen.
3. Click on 'Order by'.
4. You will then be shown 'Specify Sort Columns' screen where you can choose the criteria you wish to order your projects by.




5. To order the projects, drag one of the items from the left hand side over to the right.




6. Tick the box to stipulate whether you want the projects displayed in ascending or descending order.
7. Click on 'OK'.
8. Your print preview will now be re-ordered.
9. You can now print your report or save it as a PDF file.

Searching for Projects

Trackbase Lite has a search facility designed to allow you to pinpoint projects that match certain criteria.

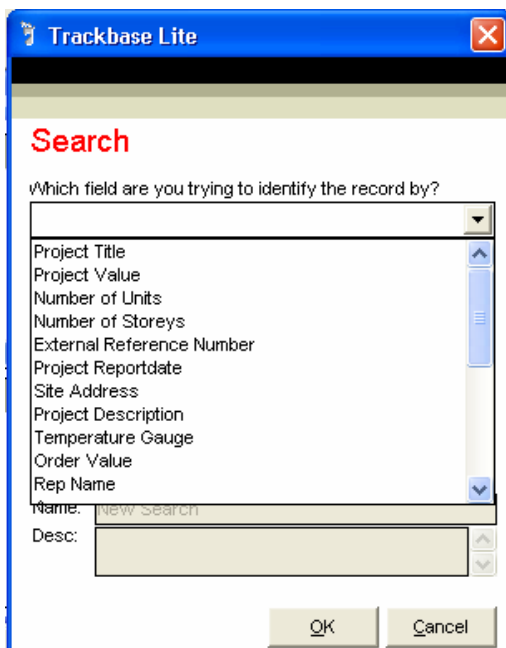
The search facility can be accessed using the torch button  on the top toolbar. Clicking on this will open the search window where you can enter your required parameters.

To perform a search, follow the steps below:

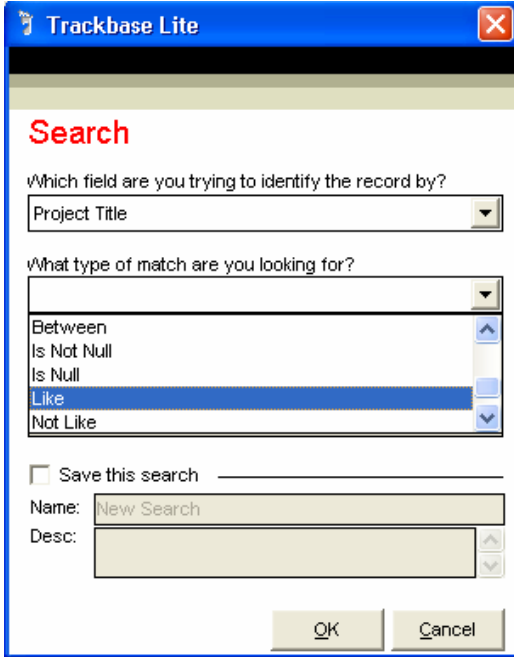
1. Click on the search icon .
2. The 'Search' window will be displayed.



3. Use the first box to select which field you want to search within.



- Drop down the next box to select the type of match you wish to search for. For a full explanation of these fields please see the section 'Search Fields'.



- In the last box type the information you are searching for.

Trackbase Lite Tip: This box has a 'wildcard' function in it. This means that you only have to type in part of the name and Trackbase Lite will bring up everything with that text in. For example, if you do a search for 'Project Title' 'Like' and then type in house, the search results will bring up anything where 'house' is in the title (i.e. house, houses, warehouse, public house, etc).



Note: If you are using one of the between functions then both of the bottom boxes will become active. The top box is used for the minimum value and the bottom box can be used for a maximum value.

- Once you have set all of your search parameters click on 'OK'.
- If you wish to save this search, place a tick in the checkbox and give the search a name. Then click on 'OK'.

8. A message box will display asking you to confirm the saving of the search. Click on 'Yes' to continue.

9. You will then be returned to the blank project screen.
10. Click on one of the view buttons (View All, View New, View Updated or View New & Updated) to display the search results.
11. If you do not see any results displayed it is possible that your search is too specific. Try changing some of your search parameters.

Search Fields

See below for a description of each of the search fields.

Field (first drop down box):

Project Number	A unique number assigned to every project.
Userid	The ID number of who created the project (0 or 1 for ABI projects).
Project Title	Title of project.
Project Value	Total value of project.
Number of Units	Number of independent units being built.
Number of Storeys	Number of storeys being built.
External Reference Number	The planning office reference number.
Project Reportdate	The original report date of the project on your system.
Site Address	The address of the project site.
Temperature Gauge	One of the user definable fields assigned to a project.
Numeric Field	A user definable field used just for entering numeric values.
Text Fields 1 – 2	User definable fields.

User Fields Update Date	The date the last time the User Fields were updated.
Notes	User notes on projects.
Notes Update Date	The date the last time your notes were updated.
Update Date	Last update date of the project on your system.
Tender Return Date	The date tenders have to be return by.
Construction Date	Date construction is planned to start.
Subcontract Value	Individual subcontract values.
Subcontract Description	Description of the subcontract work.
Grid Reference	The Ordnance Survey grid reference of the project.
Size of Property	The physical size of the project.
Size of Ground Floor	The total ground floor area of the project in square metres or square hectares.
Number of Storeys Underground	The total number of storeys to be built below ground.
Capacity of Parking Spaces	Total capacity of parking spaces.
Close Date	Planned construction completion date.

Type of Match (second drop down box):


<	Greater than
<=	Greater than or equal to
<>	Between
=	Equal to
>	Less than
>=	Less than or equal to
Between	Between
Is Not Null	Where a field is not blank
Is Null	Where a field is blank
Like	Where the text matches your query
Not Like	Where the text does not match your query

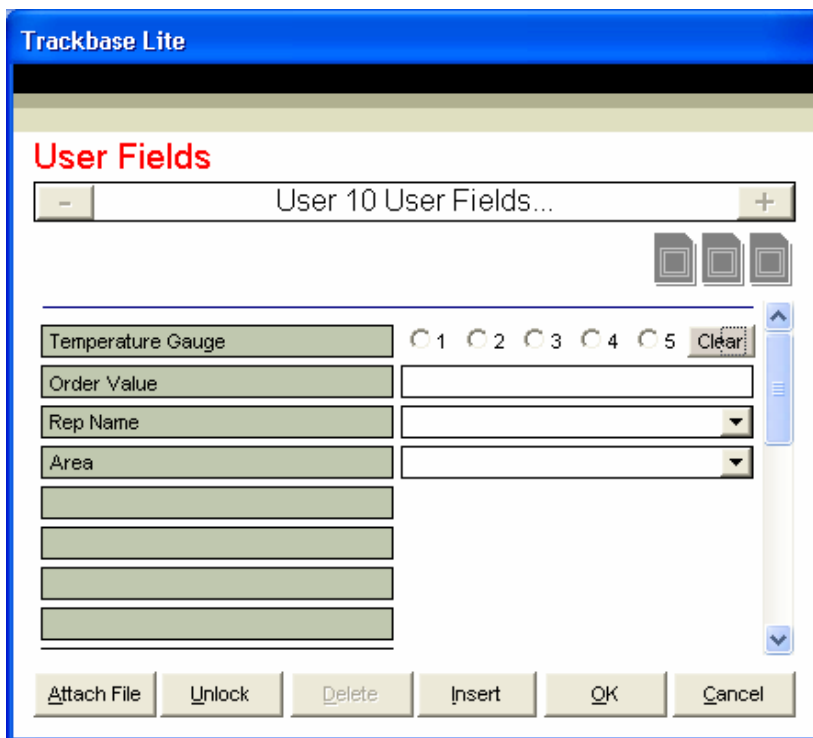
User Fields

Project/Company/People User Fields

As well as the notes you can also add personalised information using the User Fields. There are three User Fields and a temperature gauge, which are all fully customisable.

For projects there are 2 text fields, 1 numeric field and 1 temperature gauge. You can also add up to three attachments to each.

To access the User Fields, click on the button  on the bottom toolbar. A screen similar to the one shown below will be displayed:



You can type up to 250 characters in each of the text fields. This allows you to enter quite detailed information.


- Attach File:** This will allow you to attach up to three files to your project. By clicking this you will be given a 'Select Attachment' window where you can choose the file you wish to attach.
- Unlock:** This will unlock any User Fields that may have been locked if the system closed abnormally the last time you were editing them.
- Delete:** This will remove the current set of User Fields.
- Insert:** This will insert the changes to your database.
- Cancel:** This will close the window without saving any changes.
- OK:** This will close the window and save any changes you have made.

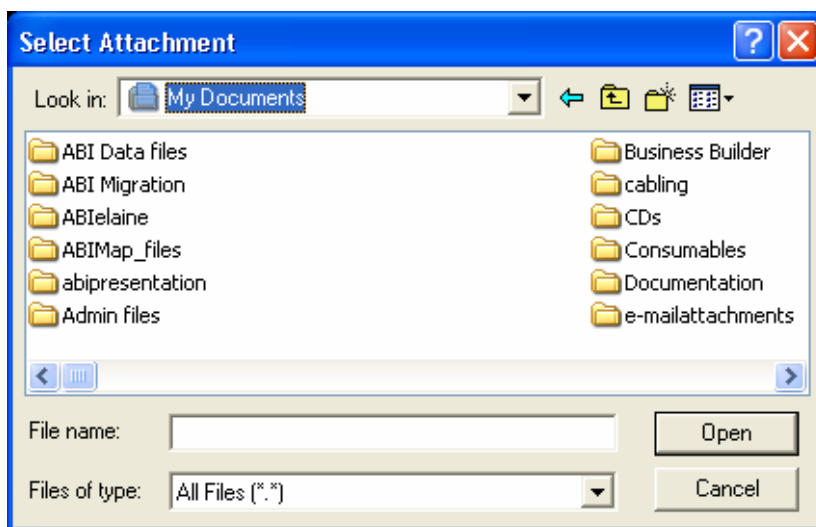
Attaching Files

You can attach files to projects in two different ways. You can add up to three attachments, which are stored within your database and then up to another two, which are not stored within your database. The ones that are not stored in Trackbase Lite have links associated to them, when you double click on the link, the file will open. This is done to save space in your database.

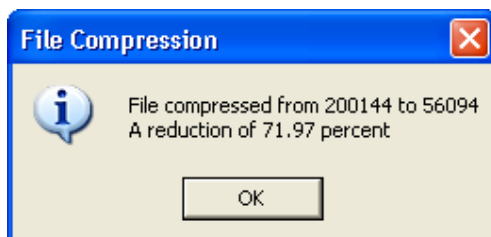
It is recommended that you only attach small documents to your data as the larger the file the larger your database will get. The larger your database gets, the longer it will take to do various processes such as searching and importing.

To attach a file into your database you will need to do the following:

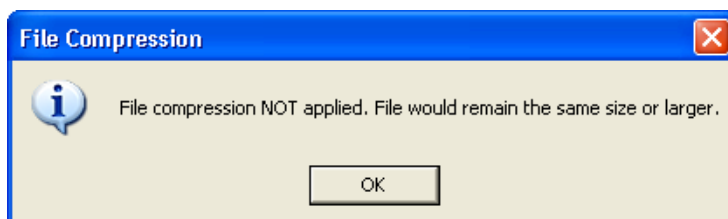
1. Open the project you wish to attach the file to.
2. Click on the User Fields button .
3. Click on the 'Attach File' button.
4. You will see a 'Select Attachment' window, where you can locate the file you wish to add to your project.



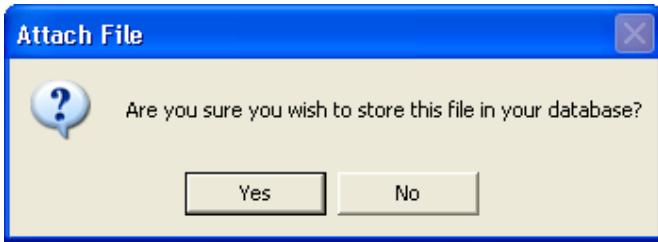
5. Select the file you want to attach.
6. Click on 'Open'.
7. Trackbase Lite will then try to compress the file you are attaching. If it can compress it you will see a message similar to the one below:



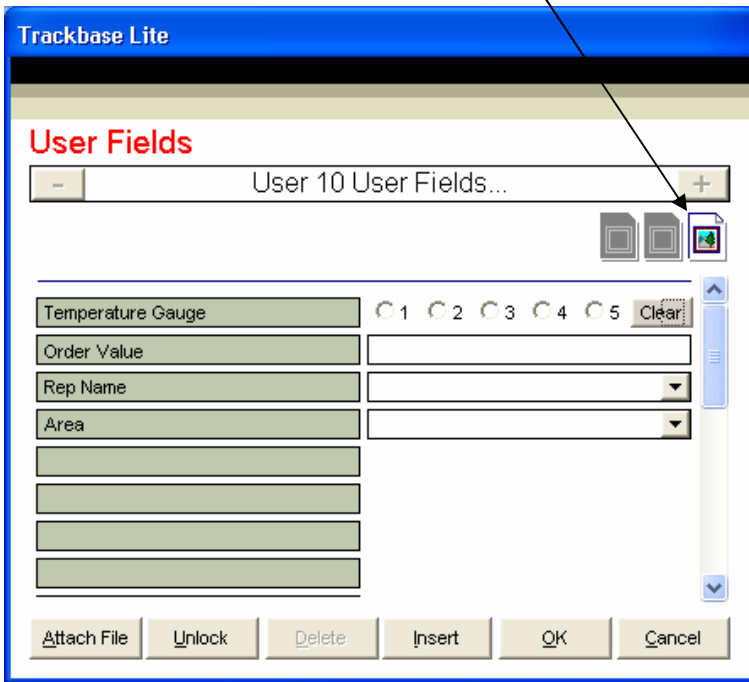
8. If it cannot you will probably see a message similar to the one below:



9. Whichever message comes up press 'OK'.
10. You will then be given a message asking if you wish to store the file in your database.



11. Click on 'Yes'. If you click 'No' then the process will be cancelled and the file will not be attached.
12. The file will now be attached to your project. You will see an icon appear which will indicate a file has been attached.



The file is now stored in your database. To open the attached file you can double click on the icon in the top right corner.

You can also attach up to another two files to your User Fields by double clicking in the User Field boxes. These attachments are not stored in your database and a link is established between them and Trackbase Lite. Double clicking these links will open the files.

Mail Merge/Export


The mail merge/export facility allows you to export information from Trackbase Lite so that it can be used in a number of different applications.

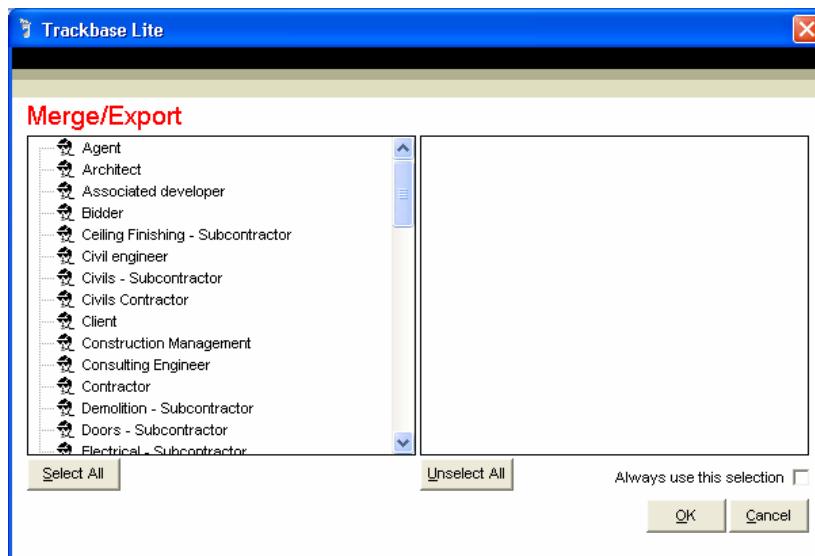
The most common use for this feature is to create mailing letters through your word processor. The exported file can also be used to import information into programs such as Microsoft Excel, Microsoft Access, Lotus WordPro, Lotus 123 and various other data handling packages.

For the purpose of this manual a mail merge into Microsoft Word 2000 is shown as the main use for mail merge. If you wish to export your information into another package please contact ABI Customer Support on 0151 353 3500 for more information.

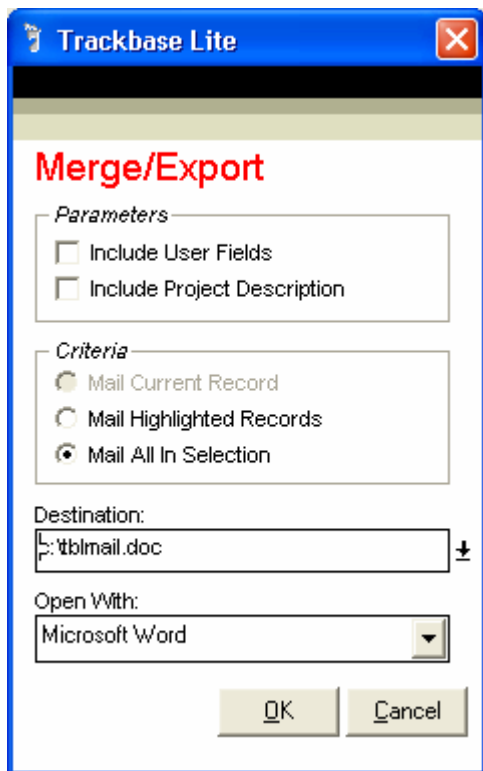
Creating a Mail Merge/Export

To create a mail merge/export file from the projects screen follow the below steps:

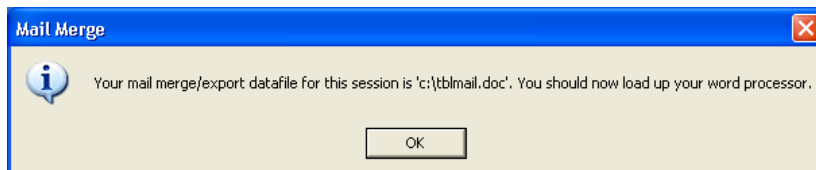
1. Bring up a project or a selection of projects on screen.
2. Click on the 'Mail Merge/Export' button  on the bottom toolbar.
3. A window will be displayed where you can choose which contacts you wish to export with the projects.



4. If you want to export all contacts click on the 'Select All' option.
5. If you only want to export individual people then you can select their role from the left side of the screen.
6. Any roles you select will appear on the right hand side.
7. Once you have selected the required roles click on 'OK'.
8. You will then see the 'Merge/Export' screen.



- a. If you want to include project user fields and the project description, select the relevant options at the top of the screen.
 - b. In the criteria box select the projects you wish to export.
 - c. By default the destination will be 'c:\tblmail.doc'. Trackbase will create this file when you press 'OK'. You can change the destination and file name by clicking on the black arrow to the right of the destination box.
 - d. The 'Open With' box gives you three options. If you select Microsoft Word or Microsoft Excel, Trackbase Lite will automatically open the selected program once it has finished exporting the information. If you select 'None', Trackbase Lite will not open any programs.
9. Once you have selected your requirements, click on 'OK'.
10. Depending on the number of projects you are exporting a progress screen will appear.
11. You will then see a message telling you that the merge/export file has been created.

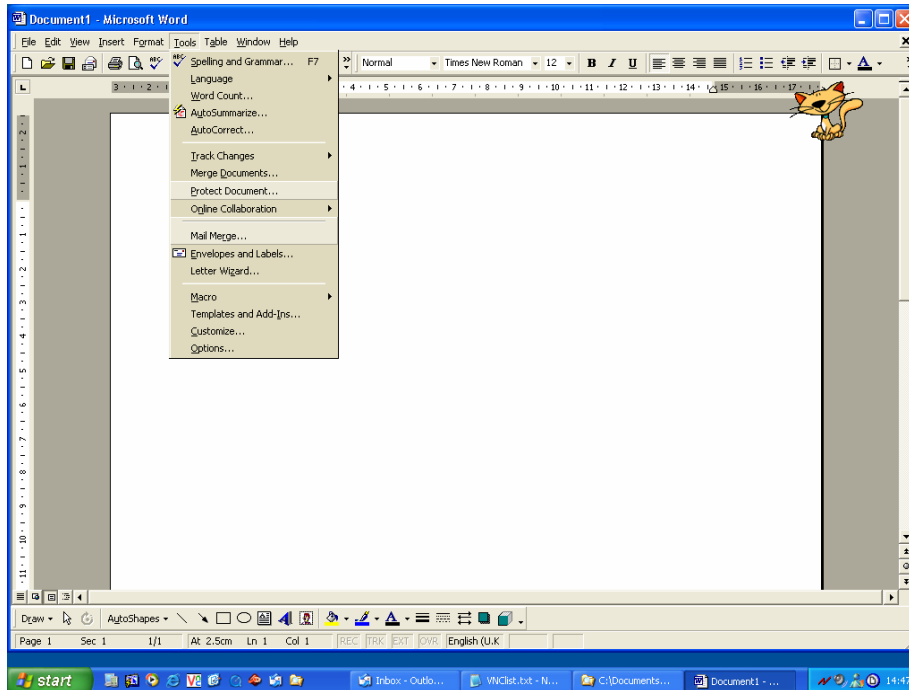


12. Press 'OK'.
13. If you have chosen to open a program Trackbase Lite will now open it.

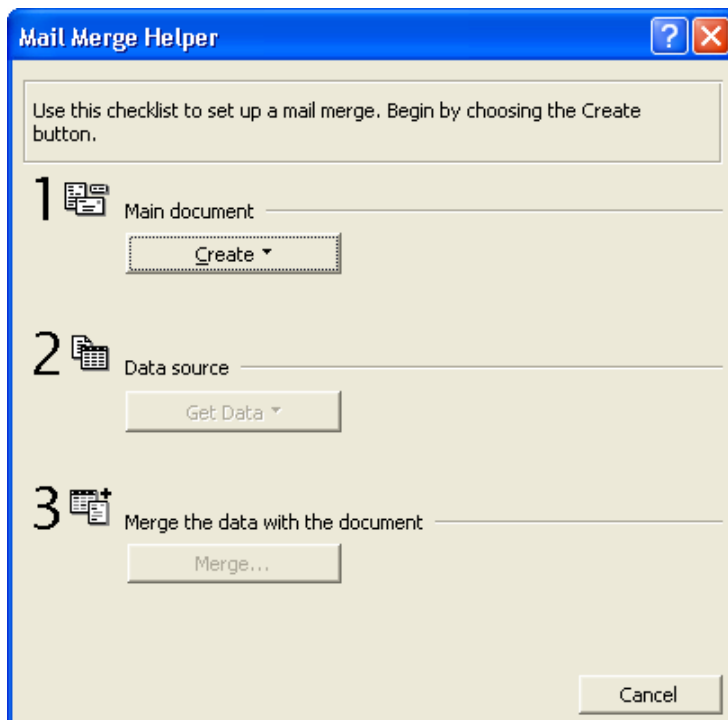
Mail Merge in Microsoft Word 2000

To create a mail merge letter in Word 2000 follow the steps below:

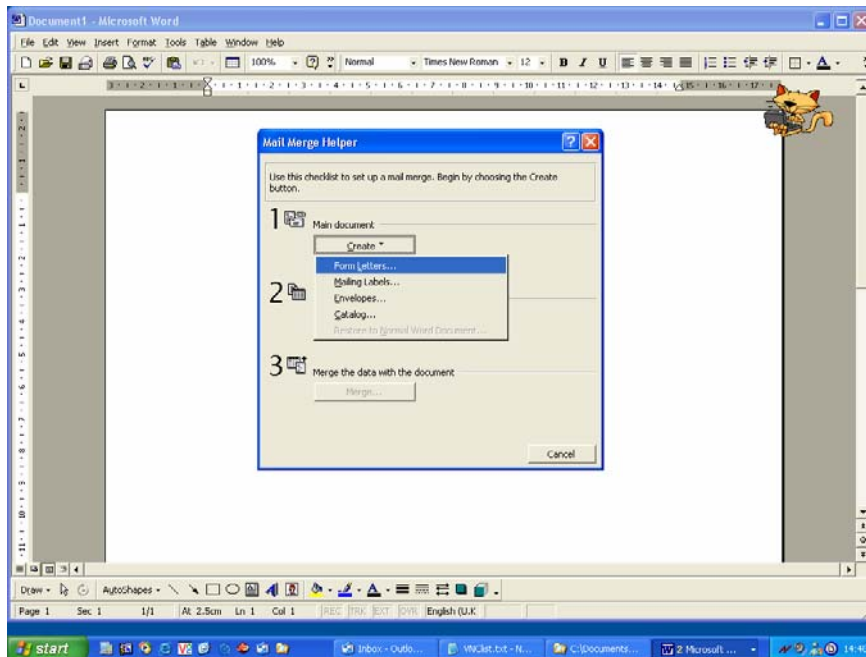
1. Go to the 'Tools' menu at the top of the screen.



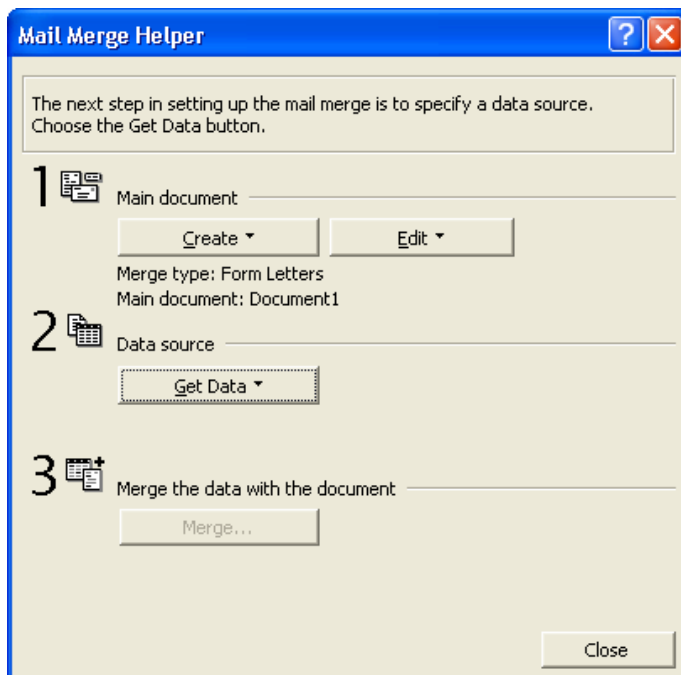
2. Click on 'Mail Merge'.
3. The mail merge helper window will open.



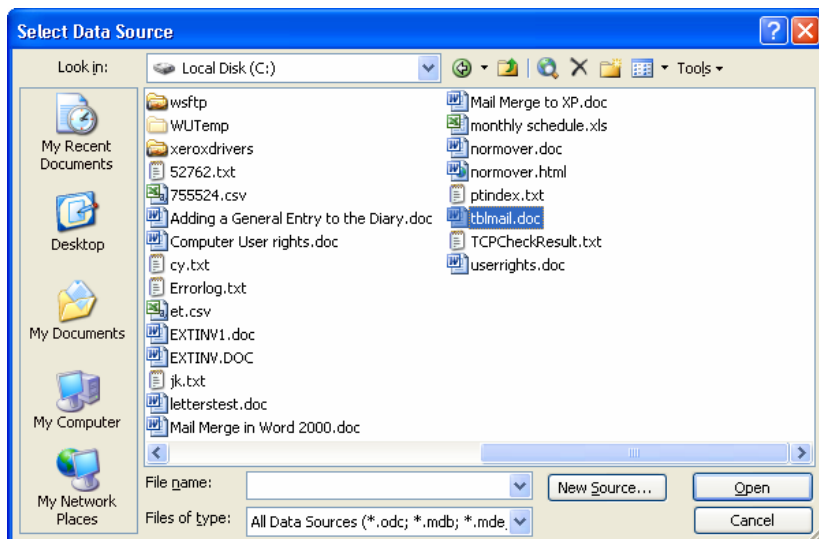
4. Click on the 'Create' button.
5. From the list click on 'Form Letters'.



6. On the next message that is displayed, click on 'Active Window'.
7. You will then be returned to the 'Mail Merge Helper' window.
8. Click on the 'Get Data' button.

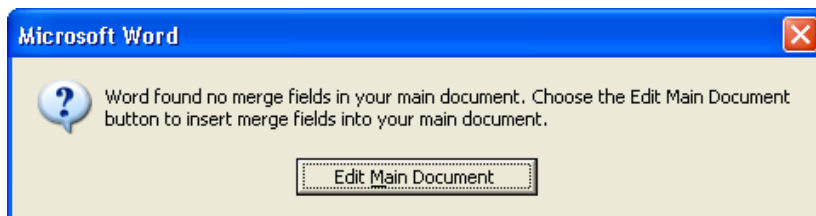


9. From the list click on 'Open Data Source'.
10. You will then see the 'Open Data Source' window.
11. By default Trackbase Lite would have created the TBLMAIL.DOC file and put it on the C: drive.
12. Drop down the 'Look in' box at the top of the screen and click on your C: drive.



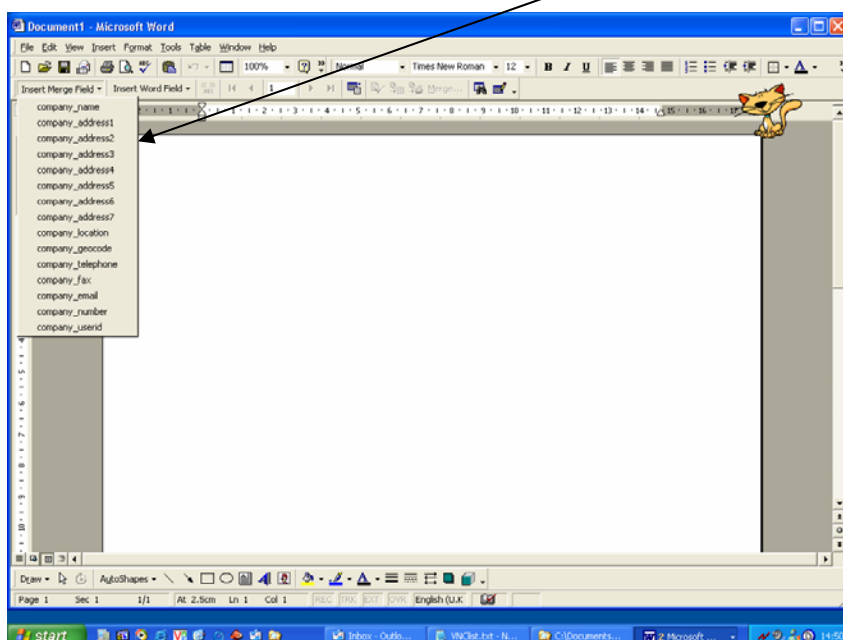
13. Find the 'tblmail.doc' file and highlight it, then click 'Open'.

14. You will then see another screen stating that there are currently no merge fields in your letter and that you should insert them now.



15. Click on 'Edit Main Document'

16. You will now be returned to your blank letter where you can now insert your merge fields from the drop down menu.



17. Continue to type out your letter inserting merge fields as required.

18. Once you have finished writing your letter click on the 'Tools' menu and click on 'Mail Merge'.

19. On the 'Mail Merge Helper' window, click on 'Merge' under section 3.

20. On the following screen click on 'Merge' again.

21. This will now merge all your letters into a new document that can be printed out.

Technical Support

Support

As Trackbase Lite has been written internally by our own IT department, we have the advantage of being able to offer full support by our in-house team at ABI.

Regular seminars are held throughout the UK in order for you to improve your skills. For any information regarding these please contact your ABI Account Manager on 0151 353 3500.

Your Account Manager

Our Account Management team can help with any enquiries regarding your subscription. Please contact them on 0151 353 3500 or via email at customersupport@abibuildingdata.com.

Technical Support

For technical support, please contact your Account Manager on 0151 353 3500 in the first instance. They will escalate your call to the IT Helpdesk if the issue requires further assistance.

Contact Address

If you would prefer to write to ABI, our address is:

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