

# T-Res Quick Referral Guide



This guide is intended to provide instructions for the most common functions performed using T-Res (*note*: some functions may appear or operate slightly differently than listed below due to the variability of different handsets running different operating systems).

To address issues not covered here, please contact T-Res customer service at 1-866-694-2323 or [support@t-res.net](mailto:support@t-res.net).

## A. Launching your T-Res account

1. **Go to the T-Res website (<http://t-res.net/>) and log in using the username and password that was emailed to you by T-Res**
  - » If you haven't received a T-Res welcome email, contact your site coordinator
  - » If you've forgotten your password, go to the T-Res website and click the "Forgot your password?" link to reset this
2. **Downloading the T-Res handheld app on your iPhone, iPad, or Android device**
  - » For iPhone or iPad, click <https://itunes.apple.com/ca/app/t-res/id375113290?mt=8>  
(or search the iTunes store for T-Res by Resilience Software; note: iPad users, download the iPhone app as this works best for iPad)
  - » For Android, click <https://play.google.com/store/apps/details?id=com.resiliencesw.tres.android.app>  
(or search Google Play store for T-Res by Resilience Software)

## B. Using the T-Res handheld app

3. **To log in**
  - » Open the T-Res app on your device
  - » Enter the username and password provided to you
4. **To log off**
  - » Exit out of the app on your handheld device
5. **To synch your device with the T-Res server**
  - » Open the app and push the synch icon (usually looks something like )
  - » Enter your username and password, if prompted
  - » It is recommended that you synch your app regularly to prevent data loss if you lose your handheld device
6. **To enter a new activity (ie. Field Note)**
  - » Open the T-Res app and log into your account
  - » Click the new activity icon (usually looks something like )
  - » Enter information into the form that opens
  - » Click Done or Save
  - » Synch device with T-Res server
7. **To view an existing Field Note**
  - » From the main activities page, select the Field Note you wish to view
  - » You may also be able to use the search function to perform a keyword search for a particular Field Note

## C. Using the T-Res web interface

---

### 1. To log in:

- » Visit the T-Res website (<http://t-res.net/>)
- » Enter username and password provided to you

### 2. To log off:

- » Press Logout button in top right hand corner of page

### 3. To change personal information or password

- » Log in to T-Res website
- » Select "Preferences" from "Help" menu
- » Make desired changes
- » Click "Save Preferences" button at bottom of page

### 4. To enter a new activity (ie. Field Note)

- » Select "Enter New Activity" from "Activities" menu
- » Enter information into the form that opens
- » Click "Save" (or "Save and New" to begin entering a new Field Note or "Save and Duplicate" to create a new field note with the same information recorded as the one you just completed)

### 5. To view the Field Notes you have entered yourself

- » Select "View Activities" from "Activities" menu
- » Use filters provided in Filter section to select only the Field Notes that meet your desired criteria (ie. only those that applied to the Domain of Care "Care of the Underserved")
- » Press the "Find Activities" button

### 6. To view all of the Field Notes that pertain to you (regardless of who entered them)

- » Click the "Reports" tab and select *Report 101 - UBC Family Practice Aggregated Field Notes*
- » Use filters provided to select the Field Notes that meet your desired criteria
- » Press the "View Report" button (a summary report should appear on the page)
- » If desired, you can sort report columns by clicking the arrows at the top of each column
- » If desired, you can export a copy of this report by selecting the preferred file format (CSV, pdf, or Excel) found under the Export icon (found in the report filter area, looks like a floppy disc). Open the report from your Downloads folder, if it doesn't open automatically