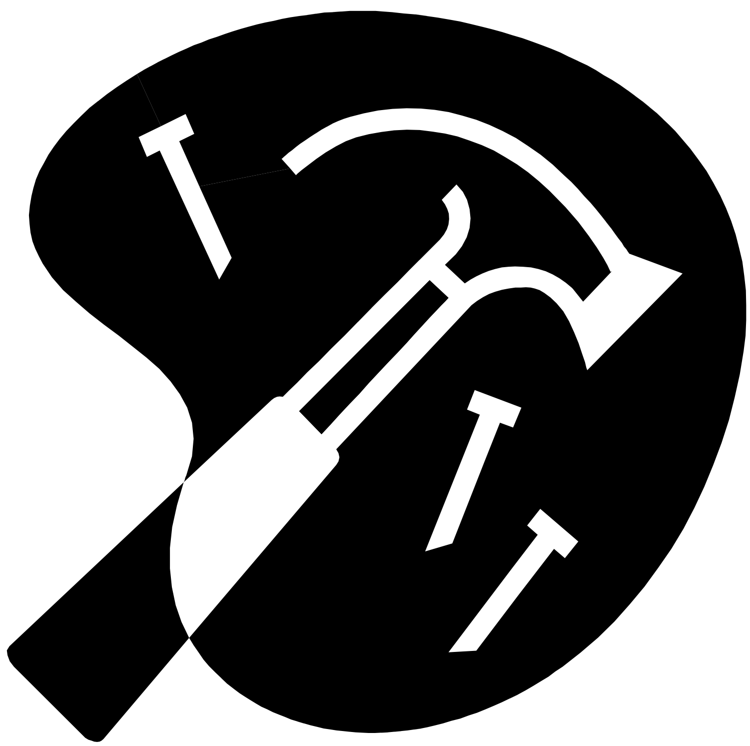
Lime Design

Tool Time User Manual



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Tool Time Help

Introduction

Tool Time is an application to manage the hiring out of tools from a library of tools. The menu system is easy to use, with all functions readily accessable. The program opens up with the two most used functions ready to go.

Features

The software has the following features:

- Easy to install
- Easy to use
- Additional reports can be created using Access.

Installation

To install the application insert the CD into your computer CD drive. Copy the contents of the Install folder to a convenient place onto your Hard Disk.

The suggested location is: **c:\Program Files\ToolTime**

Once copied right click on the ToolTime.exe file and select:
Send To/Desktop(create shortcut)

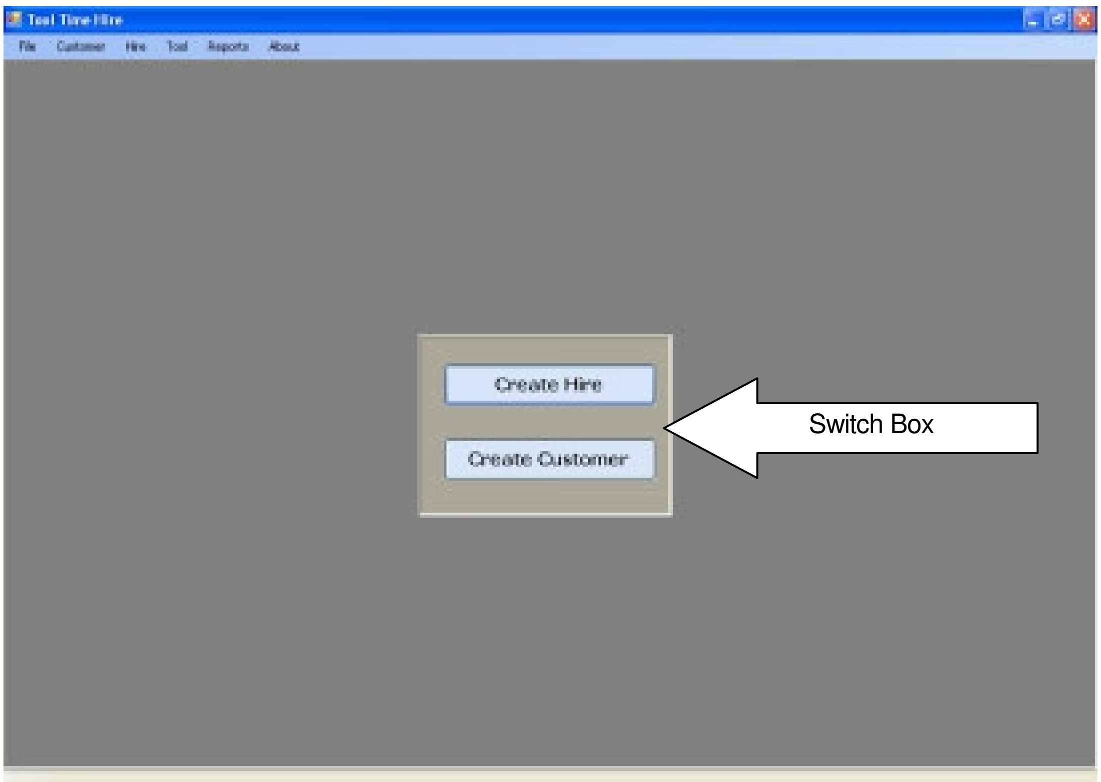
There should now be a ToolTime icon on the desktop.

Getting Started

The Main Screen

When the application is first started the main screen, as shown below, will open. At the top a menu showing the objects **Customer**, **Hire**, **Tool** and **Reports**. Each of these has a sub-menu, as can be seen with the opened **Customer** submenu.

Each object has the options New and Find. These are also available at other locations.



Switch Box

The switch box at the centre gives fast access to Create Hire and Create Customer.

To get started enter a new customer by clicking on the **Create_Customer** button. This will take you to the New Customer screen. Before hires can be done ensure that the tools have been entered, see the New Tool section for details. Once entered tools can be hired out to customers by clicking the **Create_Hire** button.

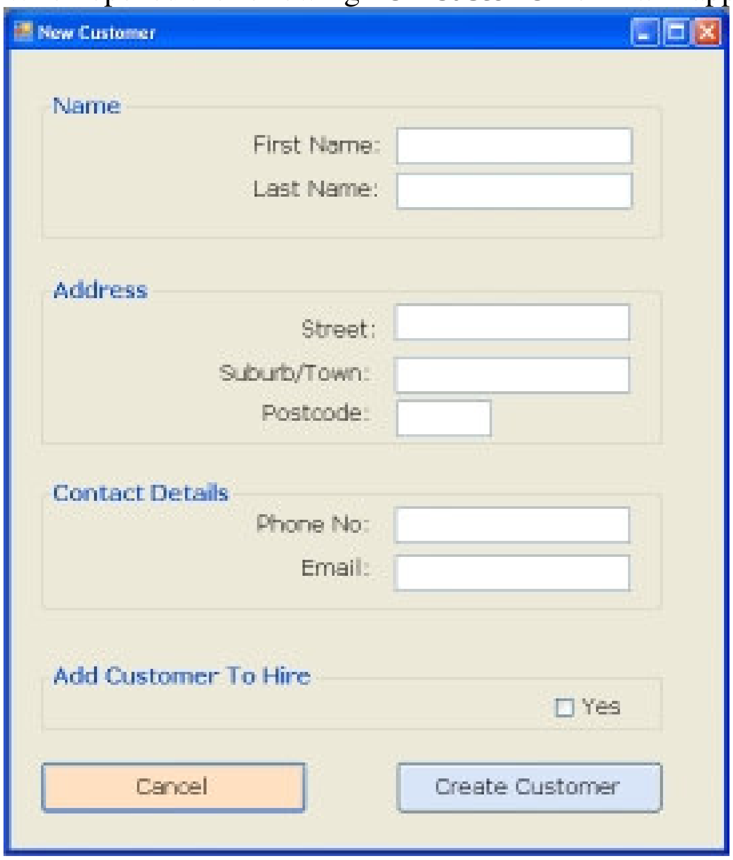
Customers

This section covers all actions that can be done with customer records.

New Customer

Adding a customer is a straight forward process. The **New Customer** screen can be reached from the **Switch Box**, the menu, or from a New Customer button that can be seen on many other forms.

When opened the following **New Customer** form will appear.



Entering Information

To use fill in the white sections with the required information. The TAB key can be used to move from one field to the next.

Error Indication

As each field is left the information is checked for validity. If there is an error a small flashing red exclamation mark will appear. If the mouse is moved over the red dot an error message will appear. In this example the email address is not valid (it's missing a dot in the domain name). Changing the email to davisg@mail.com will stop the error.

As each field is left it is formatted and displayed on the screen. For further infomation on what makes customer data valid and how each field is formatted refer to the appendices.

Add Customer to Hire

If the **Add Customer to Hire** is checked the new customer will be automatically added to a new Hire. When the customer dialog box is closed the Hire dialog box will open.

Saving the new Customer

Once satisfied the information is correct click the **Create_Customer** button. Once pressed a dialog box will appear confirming your choice. Choose Yes if you wish to save the new customer in the database. Clicking Cancel will stop the process and remove the **Create Customer** form.

Once saved a dialog box, like the one shown below will appear confirming the save. The new customer number is also shown. Click OK and both the **New Customer** form and the dialog box will disappear.

Creating a New Hire

If **Add Customer to Hire** was checked a New Hire dialog box will now open. For information on how to complete this form see the Create New Hire section.

Find Customer

To find a customer select the option from the menu at the top of the main screen. This form can also be accessed from the **Create Hire** form.

When **Find Customer** is started a form like the one shown below will appear.

To begin your search enter a name in the fields **First Name** or **Last Name** or you can use both. Click the Search_Customer button. The results will appear in the **Search Results** area below. Remember that the more narrow the search criteria is the less number of names that will be returned.

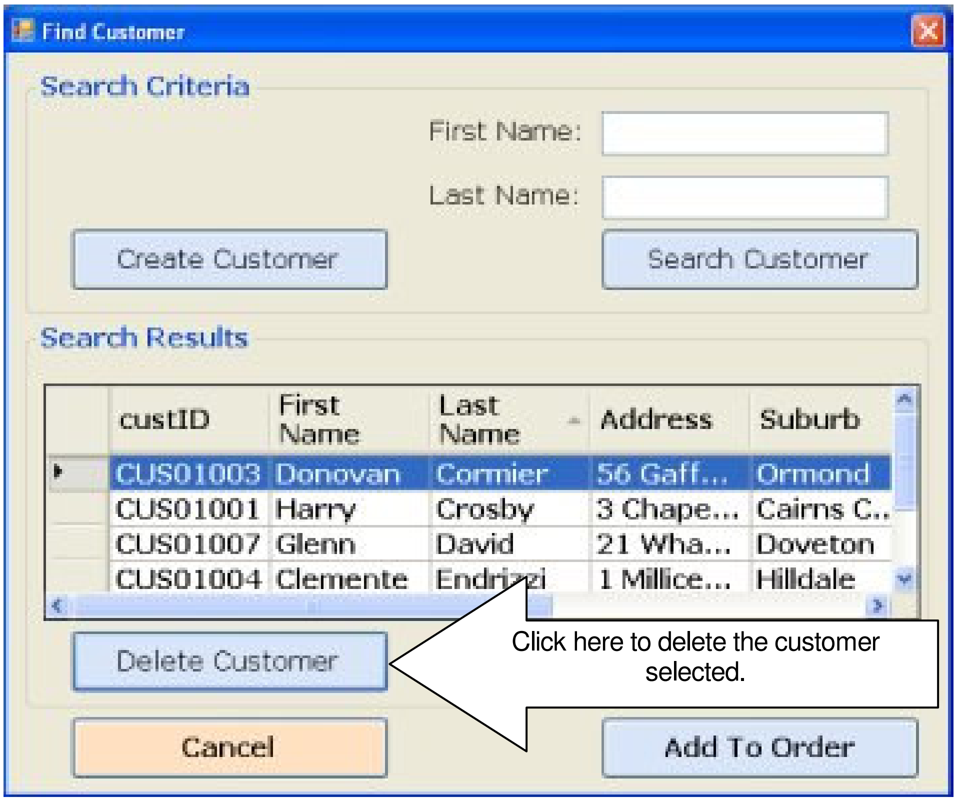
Customer records can also be created from here. Click the Create_Customer button and you will get a screen as shown in the **New Customer** help.

Edit Customer Details

To edit a customer first select a customer with the mouse from the **Search Results** box. Clicking the Edit_Customer button will take you to the editing form as shown in the **Edit/Update Customer** help.

Delete Customer

The selected customer can also be deleted from here. Click on the customer's name with the mouse. Click **Delete_Customer** and then click Yes to confirm the action.



Add Customer to Hire

The customer selected in the **Search Results** can be added to an open **New Hire** form by simply clicking **Add_To_Order**.

Cancelling

To cancel the action and remove the form click Cancel.

Edit Customer

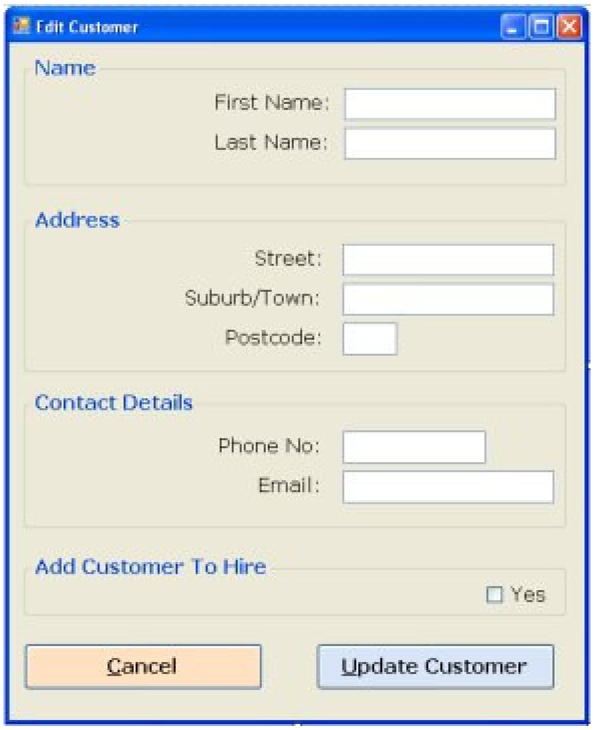
This form can only be accessed from the **Find Customer** form.

When **Edit Customer** is started a form like the one shown below will appear. The details of the customer that was selected from the **Find Customer** form will appear in the fields.

Making Changes

To make changes over type the fields with the correct information. Unlike the **New Customer** the fields are not formatted as you leave each field. This way names such as McDonald can be fixed up.

The TAB key can be used to move from one field to the next.



Add Customer to Hire

If a Create/Edit Hire dialog is open the new customer can be entered into the Hire automatically. If desired check the **Add Customer to Hire** box to allow this to happen.

Saving Customer Details

Once satisfied that all details are correct click the **Update_Customer** button to commit the changes to the database.

If you wish to cancel click the Cancel button; no changes will be made and the form will close.

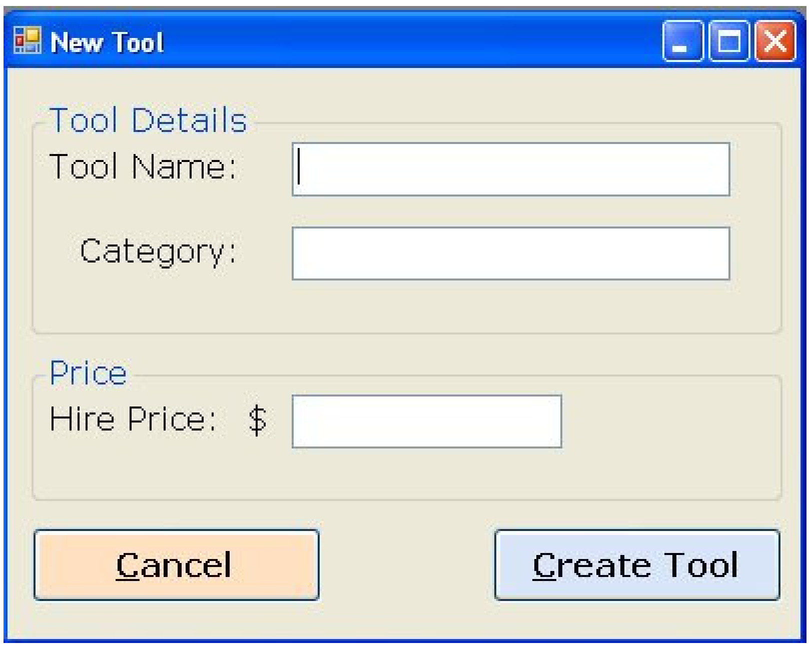
Tools

This section covers all actions that can be done with tool records.

New Tool

Adding a new tool dialogue can the menu, or from a **New Tool** button that can be seen on many other forms.

When opened the following **New Tool** form will appear.



Entering Information

To use fill in the white sections with the required information.
The TAB key can be used to move from one field to the next.

Suggested Data for Tool Name and Category

For the **Tool Name** the intention here is to provide information that will identify the tool without using the identification number, which may not be marked on the tool in some way.

The category is for the type of tool or broader group that it belongs to. The following examples may be of assistance:

Tool Name	Category
Black and Decker Orbital Sander PS1998	Orbital Sander
Hitachi Cordless Hammer drill HD-4333PN	Cordless Hammer Drill
Sidchrome Claw Hammer, Blue	Claw Hammer
Makita Power Planer, MPP-33	Planer, power
Stanley Plane, No 4	Planer, hand

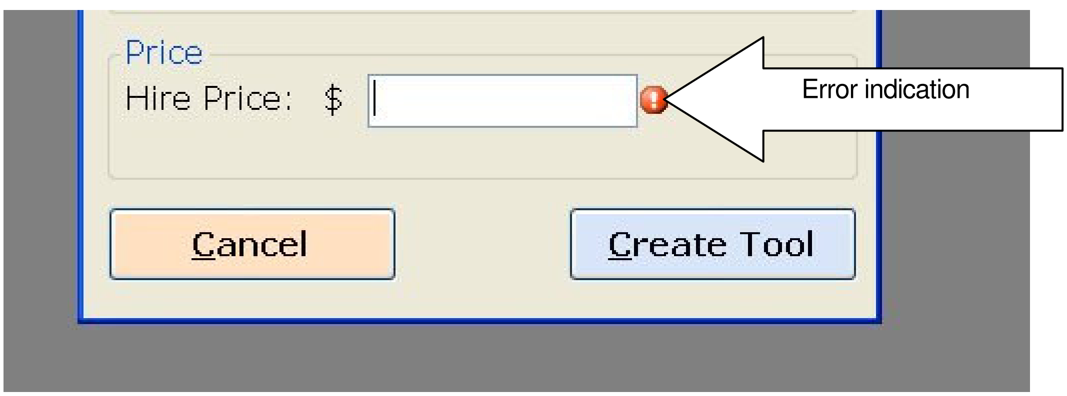
Note: Using a consistent method of selecting tool names and categories will make it easier to find tools in your database later on.

Hire Price

The Hire Price is unique for each tool. It is the monthly rate. The yearly rate is determined by multiplying the monthly rate by twelve.

Error Indication

As each field is left the information is checked for validity. If there is an error a small flashing red exclamation mark will appear. If the mouse is moved over the red dot an error message will appear. In this example the price has not been entered. Entering a price will clear the error.



As each field is left it is validated and displayed on the screen. For further infomation on what makes tool data valid and how each field is formatted refer to the appendices.

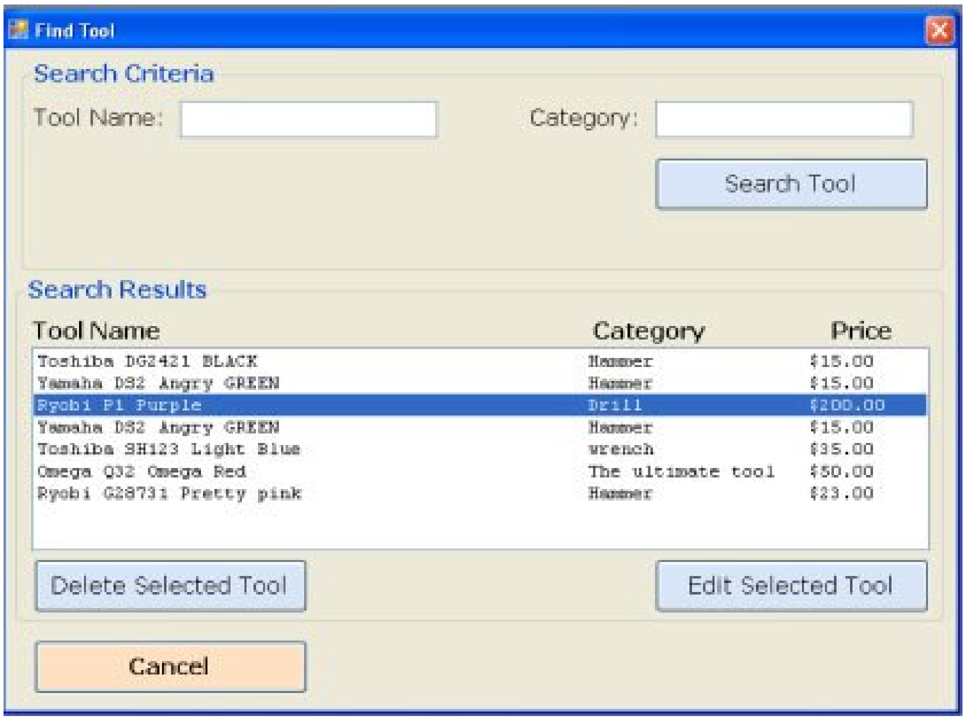
Saving the new Tool

Once satisfied the information is correct click the **Create_Tool** button. Once pressed a dialog box will appear confirming your choice. Choose Yes if you wish to save the new customer in the database. Clicking Cancel will stop the process and remove the **Create Tool** form.

Find Tools

To find a tool select the option from the menu at the top of the main screen. This form can also be accessed from the **Create Hire** form.

When **Find Tool** is started a form like the one shown below will appear.



To begin your search enter a name in the fields **Tool Name** or **Category** or you can use both. Click the **Search_Tool** button. The results will appear in the **Search Results** area below. Remember that the more narrow the search criteria is the less number of tools that will be returned.

Using a consistent method of selecting tool names and categories when they are being entered into the database will make it easier to search for them.

Note: This form cannot be used to add tools to a hire. To do this a **hire** or **customer** must be created first.

Edit Tool

To edit a tool first select the tool to be changed with the mouse from the **Search Results** box. Clicking the Edit_Selected_Tool button will take you to the editing form as shown in the **Edit/Update Tool** help.

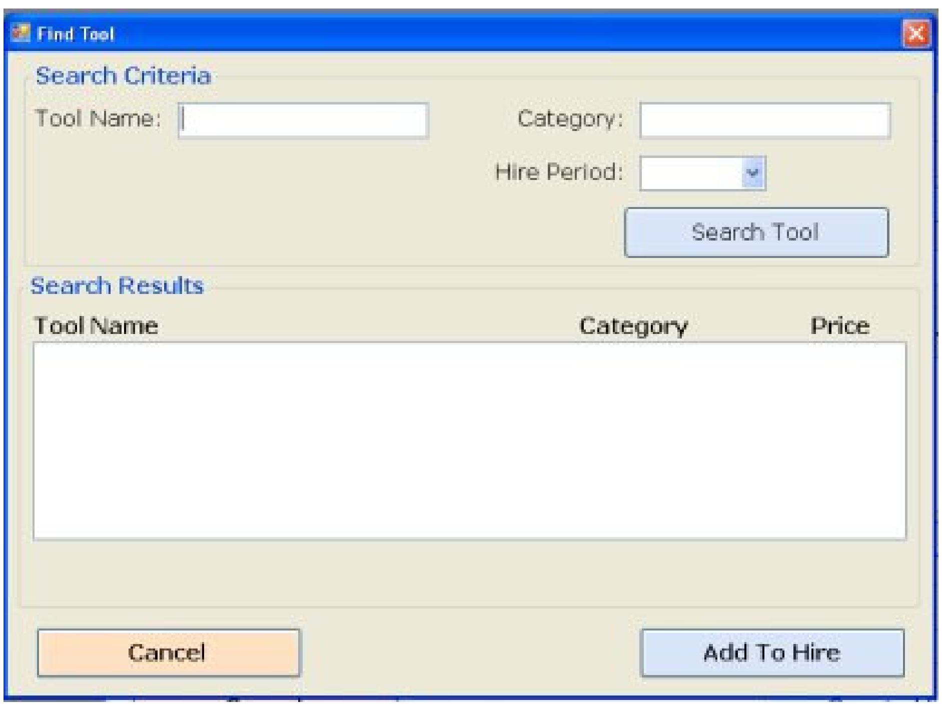
Delete Tool

To remove a tool first select the tool to be deleted with the mouse from the **Search Results** box. Clicking the Delete_Selected_Tool button will begin the tool deletion process. A confirmation box (not shown) will ask if you are sure. To complete the deletion click the **Yes** button. To cancel the deletion click **No**.

Add Tool to Hire

When Add Tool is clicked from the **Hire Form** the following **Find Tool** dialog box appears. Tools can be searched using the criteria entered in **Tool Name**, **Category** or **Hire Period**. The **Hire Period** is required, the others are optional.

Click **Search_Tool**. A list of found tools will appear in **Search Results**. Tools that are booked out for the hire period selected will not appear in the list.



To add to the opened Hire click on the tool (only one at a time can be selected) and then click **Add_To_Hire**.. The form will close showing the **Hire Form** again; but with the selected tool in the tool list for the hire.

To add more tools click **Add_Tool** from the **New Hire** form. Repeat the process until all required tools are in the **New Hire** form.

Cancelling

For all of the forms to cancel the action and dismiss the form click Cancel.

Edit/Update Tools

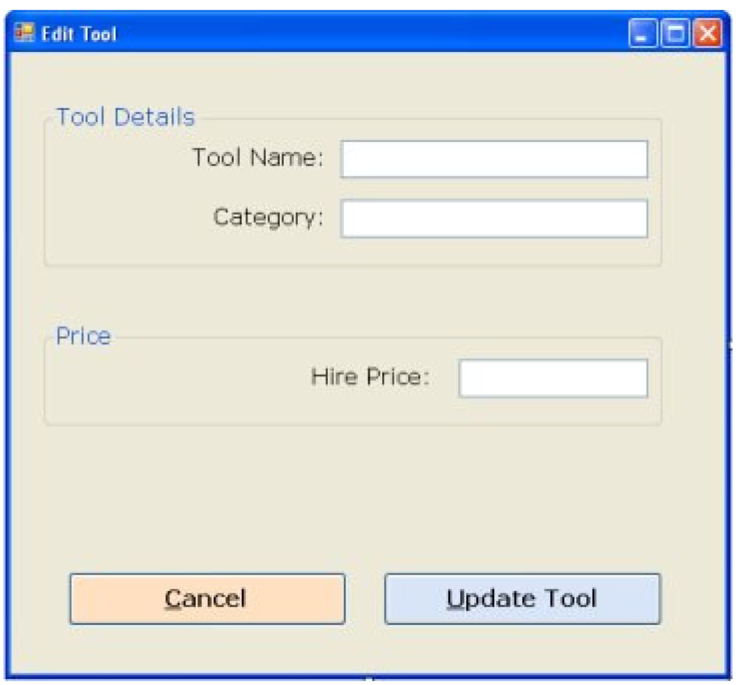
This form can only be accessed from the **Find Tool** form.

When **Edit Tool** is started a form like the one shown below will appear. The details of the tool that was selected from the **Find Tool** form will appear in the fields.

Making Changes

To make changes over type the fields with the correct information.Remember that using a consistent method of selecting tool names and categories will make it easier to find tools in your database later on.

The TAB key can be used to move from one field to the next.



Saving Tool Details

Once satisfied that all details are correct click the **Update_Tool** button to commit the changes to the database.

If you wish to cancel click the Cancel button; no changes will be made and the form will close.

Hires

This section covers all actions that can be done with hire records.

New Hire

Adding a new hire is probably the most common task that will be done with Tooltime. The **New Hire** screen can be reached from the **Switch Box** or the menu.

When selected a form like the one pictured below will appear on the screen. The form is best filled out from top to bottom.

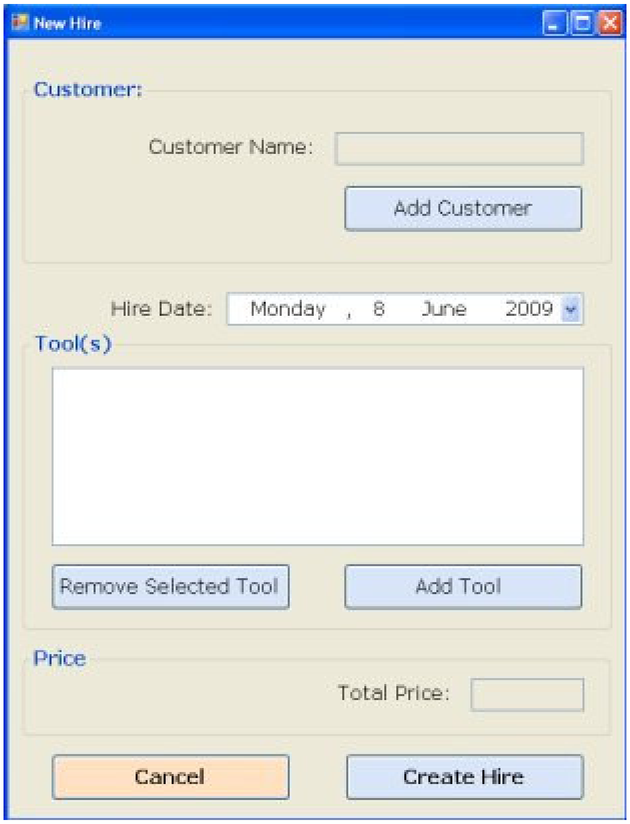
Add Customer

Note: If a new customer was added with **Add Customer to Hire** checked the new customer is automatically added to the hire. To change the customer click Change_Customer.

The first step is to add a customer. Click the **Add_Customer** button. The form from **Customer Find** will open up. Either find an existing customer or create a new customer record as required. See the instructions in the **Customer Find** section on how to do this.

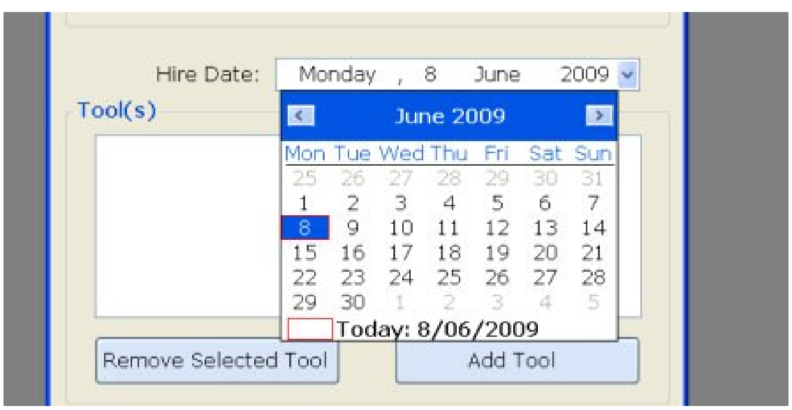
Once you have the required record on screen selected (there is a black background instead of white) be sure to click the Add_to_Hire button to add the record to the hire form.

The customer's name should now be in the field labelled **Customer Name**.



Choose Hire Date

The next step is to chose a hire date. Click on the drop down button to the right of the date and a calendar will open up as shown below. Click on the date that the customer requires. The date is used to find tools that are free when the customer wants them.



Add Tool

Next is to add tools. This step can be done once or as many times needed to put all of the required tools onto the hire.

Click Add_Tool and a form from **Find Tool** will open up. Find the tool required. See the instructions in the **Tool Find** section for information on how to do this.

Once you have the required record on screen selected (there is a black background instead of white) be sure to click the **Add_to_Hire** button to add the record to the hire form.

The tool should now be in the listed under Tool's. Repeat the process until all required tools are listed.

Remove Selected Tool

If a tool needs to be removed select it from the list using the mouse and then click the **Remove_Selected_Tool** button. A message box will confirm the action. Click **Yes** to remove the tool from the hire or **No** to leave it in.

Saving the new Hire

Once satisfied the information is correct click the **Create_Hire** button. Once pressed a dialog box will appear confirming your choice. Choose Yes if you wish to save the new hire in the database. Clicking Cancel will stop the process and remove the **Create Hire** form.

Find Hires

To find a hire select the option from the menu at the top of the main screen.

When **Find Hire** is started a form like the one shown below will appear.

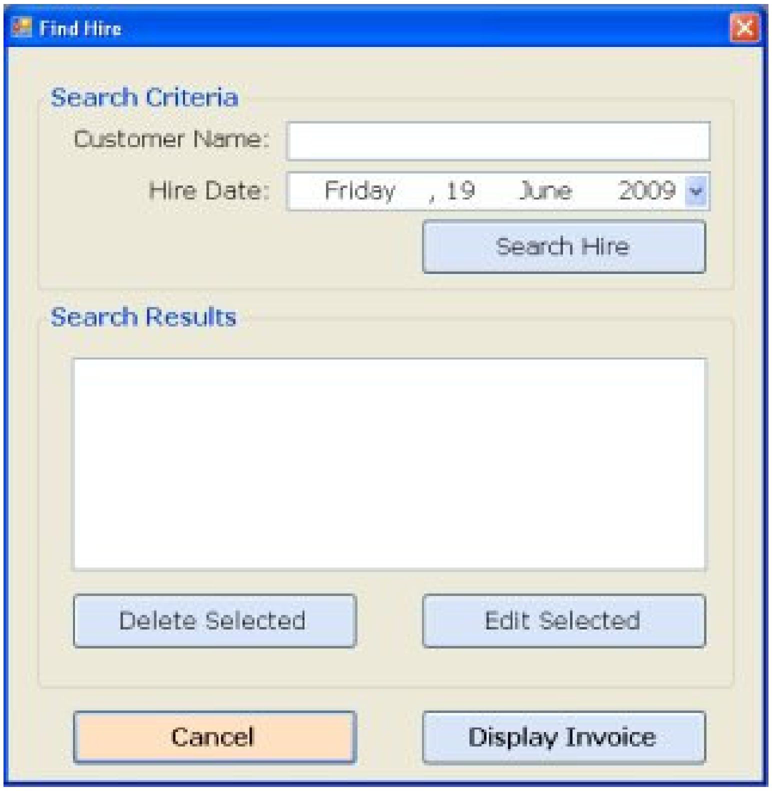
Hires can be searched by the following criteria:

- Enter a customer name in the field **Customer Name**.
- Enter a tools in the **Tool Name** field.
- Select a date using the drop down calendar.

Click the Search_Hire button. The results will appear in the **Search Results** area below. Remember that the more narrow the search criteria is the less number of hires that will be returned.

Edit a Hire

To edit a hire first select a hire with the mouse from the **Search Results** box. Clicking the Edit_Hire button will take you to the editing form as shown in the **Edit/Update Hire** help.



Delete Hire

To delete a **Hire** select the required hire from the **Search Results** list. Click Delete_Selected. Click Yes to confirm.

Display Invoice

The invoice can be displayed by clicking the Display_Invoice button. A screen will show the invoice ready for printing.

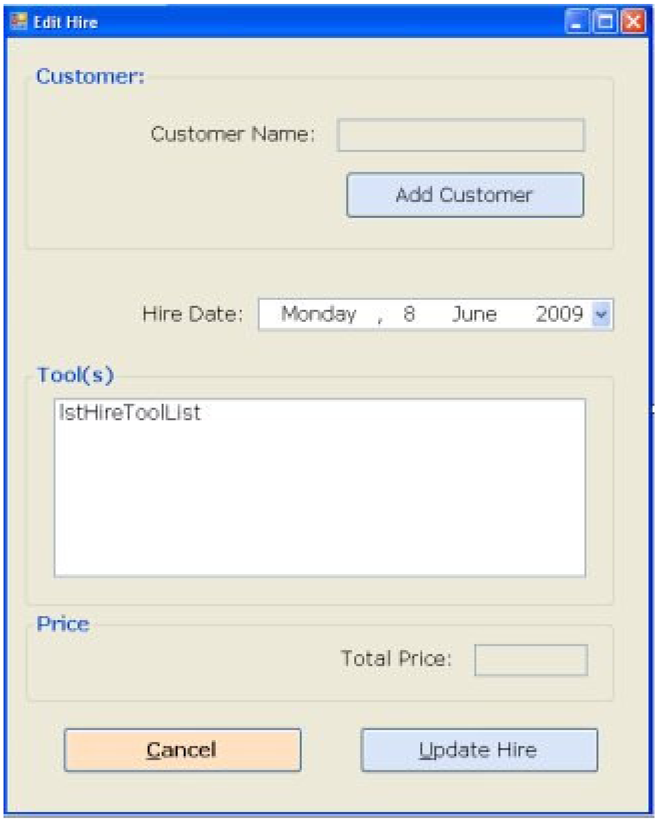
Cancelling

To cancel the action and remove the form click Cancel.

Edit Hire

This form can only be accessed from the **Find Hire** form.

When **Edit Hire** is started a form like the one shown below will appear. The details of the hire that was selected from the **Find Hire** form will appear in the fields.



Making Changes

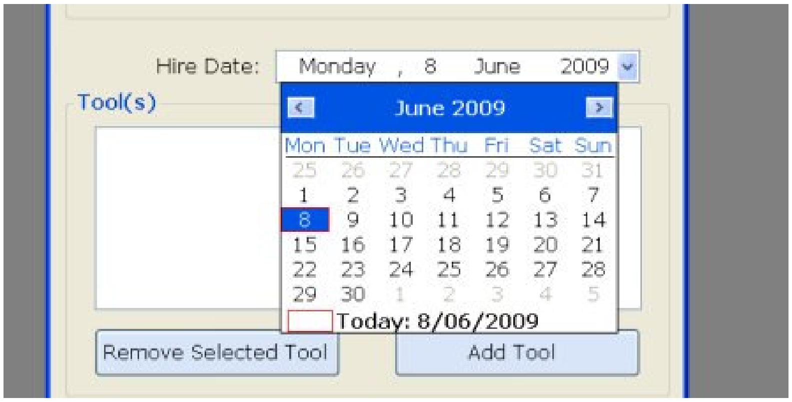
To make changes over type the fields with the correct information.

Add Customer

Clicking Add_Customer will allow you to change the customer that has the hire.

Change Hire Date

To change the hire date click on the blue arrow to the right of the date. A calendar will appear as shown below. Click on the new hire date required.



Change the Tools

This is the same process for creating a **New Hire**.

Click **Add_Tool** and a form from **Find Tool** will open up. Find the tool required. See the instructions in the **Tool Find** section for information on how to do this.

Once you have the required record on screen selected (there is a black background instead of white) be sure to click the **Add_to_Hire** button to add the record to the hire form.

The tool should now be in the listed under Tool's. Repeat the process until all required tools are listed.

Remove Selected Tool

If a tool needs to be removed select it from the list using the mouse and then click the **Remove_Selected_Tool** button. A message box will confirm the action. Click **Yes** to remove the tool from the hire or **No** to leave it in.

Updating the Hire

Once satisfied the information is correct click the **Update_Hire** button. Once pressed a dialog box will appear confirming your choice. Choose Yes if you wish to update the hire in the database. Clicking Cancel will stop the process and remove the **Edit Hire** form.

Reports

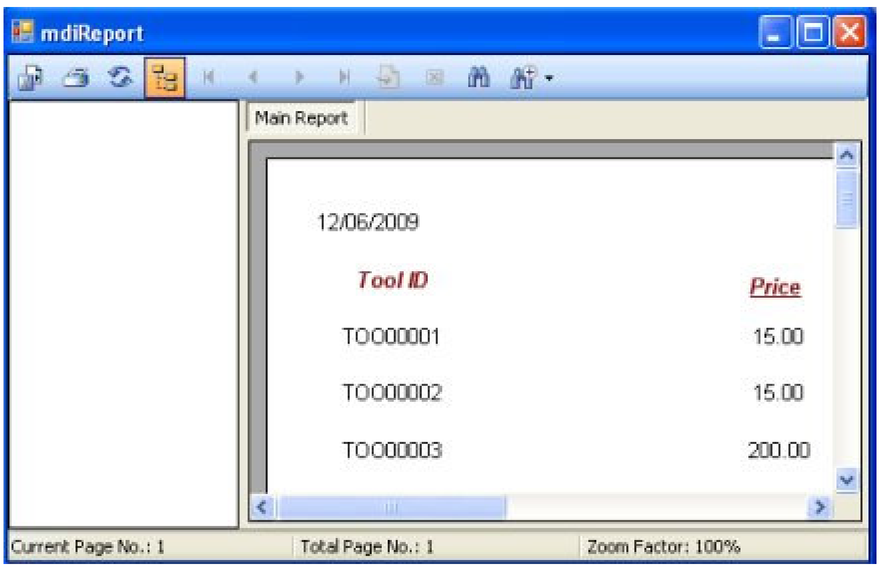
The reports are generated with Crystal Reports™, a package that ships with the ToolTime application.

Reports are only accessable from the main menu under **Reports**.

Report Controls

All reports share the same controls. Below is a screen shot of the report function in use. The pane to the left is for any grouping in the report (this example has none). To the right is the report itself.

Above the report there are a number of icons. Moving the mouse over them will show a label which explains their use.



Export Report
There are a number of formats available including:

- Adobe PDF
- Excel Spreadsheet
- Word document

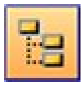
Print Report

Refresh

Refresh the data in the report. This is mainly used in multi user applications. For Tooltime it can be ignored.

Toggle Group Tree

Click this icon to display the **Group Tree** on the left hand side. If the report has groups in it they will be displayed here.



When the **Group Tree** is turned on the the icon turns amber in colour. Click it to hide the **Group Tree** column.

Find

A basic search function. For complex searches it may be better to export the report to Excel or Word.

Report Zoom

Clicking this will show a list of zoom options. Click on the one desired.

Reports available in ToolTime

The following reports are available in ToolTime. Click the links to find out more.

Hires by Category

Frequency of Hires

Fees Charged Available for Monthly or Yearly fees.

Reports -by Category

This report lists all of the tools showing the price and the category it belongs to.

A sample report is shown below.

12/06/2009

Tool	Price	Name	Category
TOO000001	$ 15.00	Toshiba DG2421 BLACK	Hammer
TOO000002	$ 15.00	Yamaha DS2 Angry GREEN	Hammer
TOO000003	$ 200.00	Ryobi P1 Purple	Drill
TOO000004	$ 15.00	Yamaha DS2 Angry GREEN	Hammer
TOO000005	$ 35.00	Toshiba SH123 Light Blue	wrench
TOO000006	$ 50.00	Omega Q32 Omega Red	The ultimate tool

TOO01000	$ 23.00	Ryobi G28731 Pretty pink	Hammer
TOO01001	$ 200.00	Browning 2000	Handgun

Reports - Frequency of Hires

This report shows how often each tool has been loaned out. A sample is shown below.

12/06/2009

	Tool ID	Hire Date	Period	Returned
Ryobi P1 Purple				
Ryobi P1 Purple	TOO00003	12/09/4000 00:00:00	Y	True
Toshiba DG2421 BLACK				
Toshiba DG2421 BLACK	TOO00001	12/06/2009 00:00:00	M	True
Yamaha DS2 Angry GREEN				
Yamaha DS2 Angry GREEN	TOO00002	12/06/2009 00:00:00	M	True
Yamaha DS2 Angry GREEN	TOO00004	1/01/2010 00:00:00	Y	False
Yamaha DS2 Angry GREEN	TOO00004	3/05/2009 00:00:00	M	False

Reports - Fees Charged

This report is available in either monthly or yearly fees. Sample of both reports are shown below.

Monthly

Monthly Report

12/06/2009

Tool ID	Hire Date	Period	Name	Price
TOO00001	12/06/2009 00:00:00	M	Toshiba DG2421 BLACK	$15.00
TOO00002	12/06/2009 00:00:00	M	Yamaha DS2 Angry GREEN	$15.00
				$30.00

Yearly

Yearly Report

12/06/2009

Tool ID	Hire Date	Period	Name	Price
TOO00001	12/06/2009 00:00:00	Y	Toshiba DG2421 BLACK	$15.00
TOO00002	12/06/2009 00:00:00	Y	Yamaha DS2 Angry GREEN	$15.00
TOO00004	3/05/2009 00:00:00	Y	Yamaha DS2 Angry GREEN	$15.00
				$45.00

FAQ (Frequently Asked Questions)

This section covers the following questions.

How do I delete a customer?

Select the option Customer/Find from the top menu.

Search for the required customer, or scroll down the list until the required customer is in view.

Click on the customer's name. The line should now be highlighted. Click **Delete_Customer** and then confirm **Yes** when prompted.

For more details refer to the section on **Finding Customers**.

How do I delete a hire no longer required?

Select the option Hire/Find from the top menu.

Search for the required hire, or scroll down the list until the required hire is in view.

Click on the hire required. The line should now be highlighted. Click **Delete_Hire** and then confirm **Yes** when prompted.

For more details refer to the section on **Finding Hires**.

What makes customer information valid?

Customer Number	Generated automatically	This is in the format of the letters **CUS** followed by five digits, for example **CUS01001.** The next customer number in sequence after the last customer record saved is used. The minimum customer number is 1000, ie the first one will be CUS01000.

First name	Must be entered.	First letter is capitalised, eg **tom** changes to **Tom**.
Last name	Must be entered.	First letter is capitalised, eg **smith** changes to **Smith**.
Street	Must be entered.	First letter is each word is capitalised, eg **14 bay street road** changes to **14 Bay Street Road**
Suburb/Town	Must be entered.	First letter is each word is capitalised, eg **north melbourne** changes to **North Melbourne**
Postcode	• Must be entered. • It cannot start with a 9. • Must not exceed four digits.	No formatting is done.
Phone Number	• Must be entered. • Can only contain 10 digits. • Must start with a valid Australian area code, ie 02 to 08 inclusive.	All brackets, dashes and spaces are removed.
Email address	• Must be entered • Must contain a @ symbol • Must have text and at least one period (dot) after the @	No formatting is done.

What is valid Tool Data?

Tool ID	Generated automatically	This is in the format of the letters **TOO** followed by four digits, for example **TOO0001**. The next tool number in sequence after the last tool saved is used.
Tool Name	• Must be entered.	No formatting is done.

	• The name can only have alphanumeric characters. • Symbols, ie #$%&, are not permitted. • Mnimum of 2 characters • Maximum of 50 characters	
Category	• Must be entered. • The name can only have alphanumeric characters. • Symbols, ie #$%&, are not permitted. • Mnimum of 2 characters • Maximum of 50 characters	No formatting is done.
Hire Price	• Must be entered • Cannot accept symbols e.g #$%& • Must not exceed $10 000 • Must be at least $1	No formatting is done.