# Track'Em<sup>™</sup> User's Manual

Version 3.18



# **RVB** Systems Group

www.barcode-solutions.com

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## Track'Em<sup>TM</sup> System Introduction

Track'Em<sup>TM</sup> is a PC based inventory and asset tracking system. It was developed for ease of use right out of the box. Track'Em consists of a Microsoft Access PC database system which consists of a password protected menu system, dozens of database table and reports and a barcode label printing module. Track'Em is available as follows:

Track'Em Lite - includes the following:

- Track'Em PC database system
- <u>Corded barcode scanner</u>
- 500 pre-printed adhesive-backed paper barcode labels

Track'Em Standard - includes the following:

- Track'Em PC database system
- Portable barcode scanner pre-programmed with Track'Em portable scanner software
- Communications cable
- Battery and battery charger
- 500 pre-printed adhesive-backed paper barcode labels

The following ADD-ON MODULES are also available:

Track'Em Deluxe Labeling Module Add-On- includes the following:

- Pre-designed Bartender barcode label templates for asset, inventory and location labeling PLUS
- BarTender Automation Edition Professional software for barcode label printing. This option allows you to print directly from Track'Em, using the Track'Em forms to select product, asset or location records to print, as well as automatically updating the Track'Em database with information related to the print job.

OR

• BarTender Professional Edition Professional software for barcode label printing. This method prints the same labels as the Automation Edition, but uses Bartender's method of selecting records and does not automatically update the Track'Em database with information related to the print job.

Track'Em Developer ADD-ON - includes the following:

• Source code and documentation for the Track'Em PC database system and the Track'Em portable scanner software

The Track'Em database allows you to track ASSET and INVENTORY data. Things are considered <u>ASSETs</u> if they have unique numbers, such as serial numbered office equipment, tools, or legal documents. Things are considered <u>INVENTORY</u> if two of them have the same part number (ie – barcode number), such as two cases of copier paper or two boxes of screws.

ASSETS can be assigned a LOCATION, STATUS, DEPARTMENT, MODEL NUMBER and a CATEGORY. The status field can include an actual status code, or any information, such as user name. There are dozens of additional fields for assets, including serial number, date acquired, next scheduled maintenance, and purchase price.

INVENTORY is stored by location and the on-hand quantity is totaled for each location. Moving inventory to a location that has been designated to deplete inventory reduces on-hand inventory. This can include customers, projects, work stations, or physical locations. Inventory is increased in the system by using the RECEIVE INVENTORY option. The terms PARTS, PRODUCTS, ITEMS and INVENTORY are used as throughout this manual to define INVENTORY.

Track'Em includes the ability to create KITS / ASSEMBLIES, track inventory levels for these types of records, automatically deplete inventory levels of kit components, and write history records for component usage.

The CHECK IN / CHECK OUT module can be used to easily track assets that are checked out. This includes books, documents, tools, tapes, etc. You can assign different check out periods to individual assets, categories of assets or merely use the default system wide check out period. You can run reports showing how long assets were checked out to a specific job, project, person or location.

Track'Em also allows you to view an item or asset's picture on the PC screen as shown in Figure 1 below:

<b>⊠Track'Em</b> -	Product Table by Barcode - Simple	×
Barcode	200001	~
Product Number	200001-AB	
Unit of Measure	EA	
Category	PC CABLE	
Short Description	PRINTER CABLE	
Reorder Qty	20 On hand 0	
Add / Up	Delete Record Select Picture	

Figure 1

## Track'Em PC Software Installation

The following screens (Figures 2a, b and c) illustrate the Track'Em installation routine. This routine should automatically start when you insert the Track'Em CD. If this routine does not automatically start, locate and start the file named SETUP.EXE file on the CD.

#### NOTE: YOU WILL NEED ADMINSTRATOR RIGHTS ON YOUR PC IN ORDER FOR THE TRACK'EM INSTALLATION PROGRAM TO ADD AN ODBC DSN (Data Source Name) AND CREATE THE TRACK'EM DIRECTORIES.

<b>≉Track'Em</b> 3	.0	×
	Welcome to Track'Em 3.0 Setup program. This program will install Track'Em 3.0 on your computer.	
	It is strongly recommended that you exit all Windows programs before running this Setup Program.	
	Click Cancel to quit Setup and close any programs you have running. Click Next to continue with the Setup program.	
	WARNING: This program is protected by copyright law and international treaties.	
	Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.	
	<u>Next</u> → Cancel	

Figure 2a

'Em 3.0 in the foll nt folder, click Bro , you will need to ack'Em PDT and 'Em user's manua p install Track'Em	owse, and se o manually mo Label Modul al.	lect another odify the defi es. These s	ault directory ettings are	
			Browse	
			B <u>r</u>	owse

Figure 2b

∯Track'Em 3.0	×
Start Installation	
You are now ready to install Track'Em 3.0.	
Press the Next button to begin the installation or the Back button to reenter the installation information.	
Wise Installation	-

Figure 2c

In order to complete the installation, you must enter the serial number (Figure 3) provided with the Track'Em CD. It is located on the inside of the Track'Em CD case.

Track'Em Seri	al 🔀
Enter the serial number provide of the Track'Em CD case.	ed on the inside
Track'Em Serial:	
Click the OK button to c Click Cancel to abort the i	nstallation.
OK Eigung	Cancel

#### Figure 3

#### Portable Scanner Communications Software Setup

If you are using the portable scanner (sometimes referred to PDT, or portable data terminal) provided with Track'Em Standard, then you will need to install the communications software. Click INSTALL PORTABLE SCANNER SOFTWARE (as shown in Figure 4), select the default directory (as shown in Figure 5a & b) and follow the onscreen directions. PT Comm can be installed at a later time by running the program named **PtCommInstall.MSI** located on the TrackEm installation directory as well as the Track'Em CD.



Note: Use the default directory as shown in Figure 5b or you will need to manually modify the PDT SETUP FORM (Advanced System Menu) to match the directory you select in Figure 5b.

👹 PTComm Manager		_ 🗆 ×
Select Installation Folder		
The installer will install PTComm Mana	ger to the following folder.	
To install in this folder, click "Next". To i	nstall to a different folder, enter it bel	ow or click "Browse".
Eolder:		
C:\Program Files\Unitech America I	nc\PTComm Manager\	Browse
		Disk Cost
Install PTComm Manager for yourse	lf, or for anyone who uses this comp	uter:
<ul> <li>Everyone</li> </ul>		
C Justme		
	Cancel < Back	Next>
	Figure 5b	

NOTE: If you are running Windows 7 in 64 bit mode, you must install the portable scanner communications program (PT COMM) this communications program using the file on the Track'Em CD named as follows:

#### CD:\Windows 7 (64 bit) PT Comm\JobGenPlusWithPT\_Comm.msi

#### Access Runtime Setup

Track'Em requires a licensed copy of Microsoft Access to properly function. If you do not own a copy of Access, a fully licensed runtime version of Access is provided at no charge on the Track'Em CD. This runtime version of Access will allow you to run Track'Em (and other programs developed using Access), but it will not allow you to make any change any to the Track'Em reports and / or forms.



Figure 6a

If you need to install the runtime version of Access, select INSTALL ACCESS RUNTIME (shown in Figure 6a) and the screens shown in Figures 6b and 6c will appear. Follow the onscreen instructions in order to properly install the Access runtime program. If you skip this step, you can use Windows Explorer at a later date to locate the file named ACCESSRT.MSI located on the ACCESS RUNTIME FILE directory on the Track'Em CD.

rosoft Office Access 2003 Runtime Setup
crosoft Office Access 2003 Runtime
nmary CD
Setup is ready to begin installing and will perform the following tasks:
- Install the following Microsoft Office 2003 applications a Access Runtime (Run from My Computer)
Space Required17 MB Space Available 27 GB
< Back Install Cancel
Figure 6b

## Track'Em PC System

The Track'Em PC software consists of one file named TrackEm3.mdb and dozens of companion files located in the same directory. The file named TrackEm3.mdb is a Microsoft Access database file that contains forms, reports, queries, data tables (objects), and source code developed using Visual Basic for Applications (VBA). If you own a licensed copy of Microsoft Access, you can edit any of the existing Track'Em objects using Access.

If you purchase the DEVELOPER ADD-ON, you will be able to edit any of the VBA (Visual Basic for Applications) code that runs in the background. Additionally, you will be able to create new objects (reports, forms, queries, tables, etc) using MS Access.

When Track'Em first starts, a COPYRIGHT screen (Figure 9a) will appear for 3 seconds. You can select a CUSTOM LOGO to appear as shown in Figure 9b using the SETUP FORM on the System Admin Menu (Fig 59).

If you are running the demo version of Track'Em, this screen will indicate the remaining number of times the system can be started.



Track'Em allows you to select whether or not to require a username / password entry at startup. **The default method is to not require user name / password.** Consult the SYSTEM ADMIN section of this manual for details regarding how to enable or disable the password entry requirement. The system is shipped with two accounts, one is an ADMINISRATOR account and one is a USER account. You can modify these accounts using the SYSTEM ADMIN MENU once Track'Em is started. These two accounts are:

Security level	User name	Password
USER	USER	USER
ADMINISTRATOR	ADMIN	ADMIN

Table 1

Track'Em
Track'Em Security Screen
Enter USER NAME and PASSWORD and CLICK CONTINUE
Enter User Name
Enter Password
Continue Cancel
Form View

Figure 10 (Only displayed in PASSWORD option is enabled)

After entering a valid account, you will see the Main Menu (Figure 13). Figure 11 will appear if the user name and/or password are incorrectly entered. These values are NOT case sensitive.

Microsoft Ac	cess						×
You have en	tered an IN\	/ALID use	rname / p	assword c	ombinati	on. Try	again.
			ОК				

Figure 11 (Only displayed in PASSWORD option is enabled)

To activate any of the menu choices, click on the button next to the menu description. The Utility Menu shown in Figure 12a/b allows you to print, find and sort records in Track'Em. Microsoft Access uses the tools shown in Figures 12d & e to add, view and edit records. Descriptions of each menu option follow. (Note: when running Access 2007 or 2010, click the Access tab labeled ADD-INS to view the custom toolbar as shown in Fig 12b.)

PRINT PREVIEW EXPORT UNDO CUT COPY PASTE DELETE INSERT SELECT FIND FIND REPLACE SORT(S) Figure 12a (Access 2003)
$ \textcircled{\begin{tabular}{ c c c c } \hline \hline$

The EXPORT menu bar tool function is allows you to export table and report data to any data type supported by Microsoft Access including MS Excel. When a report or table is open, merely click the EXPORT tool, and specify the data type, file name and click SAVE.

If you are running Access 2007, you must have MS OFFICE SERVICE PACK 2 (available from Microsoft) installed in order to use the EXPORT button shown in Fig 12b or the following error message appears.



To add a record in DATASHEET MODE, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record. You must move to the next line in order to add the entire record.

#### Main Menu

The Track'Em menu system allows you to easily open forms and reports. If you enable the PASSWORD OPTION on the Track'Em PC program, you can select password protection for individual menu options.

You can easily customize the menu banner which reads "My Company Name Here" by default. Additionally, you can rename menu descriptions, change the font size, or hide unwanted menu options. Consult the System Admin section of this manual for details.

Main Menu						
THIS IS MY COMPANY						
Track'Em™ - Version 3.18 - Copyright by	RVB Systems Group - All Rights Reserved					
Inventory Data Entry Menu	Assets Data Entry Menu					
Inventory Reports Menu	Assets Reports Menu					
Kit / Assembly Menu	Check In / Check Out Menu					
Send Portable Barcode Scanner Data to PC	Labeling Menu					
Import / Export Selected Data	Custom Reports Menu					
System Admin Menu	Exit Track'Em					
E:						

Figure 13

#### Inventory Data Entry Menu

The Inventory Data Entry Menu allows you to enter Master Product Data and Current Inventory Data. These are two distinct types of records. <u>The Master Product Data table contains one</u> <u>detailed record for each product.</u> Track'Em defines PRODUCTS as items that are not uniquely numbered, like boxes of printer paper, pipe fittings, or other non-serialized items. PRODUCT records contain information about a specific product, information such as description, price, category, department, vendor and reorder quantity.

The Current Inventory Data table contains inventory level records for the products, including location and quantity on-hand. INVENTORY records contain only the product number, location, quantity in that location, and date last updated. The Inventory Data Entry Menu is shown in Figure 14. This table can contain multiple records for the same product barcode because it contains one record for every location where that barcode is currently located.

Track'Em allows you to enter a different number for a product's PRODUCT NUMBER and BARCODE NUMBER in the PRODUCTS table. This is helpful when you need to run reports based upon historical part number instead of UPC barcodes or other barcode numbers.

The BARCODE NUMBER is used as a record's key in the inventory and inventory history tables. This allows you to track different unit of measures (each, shelf pack, shipping carton, pallet, etc.) for the same product by assigning each unit of measure a unique barcode number.

Inventory Data Entry Menu							
THIS IS MY COMPANY							
Track'Em™ - Version 3.18 - Copyright by F	VB Systems Group - All Rights Reserved						
Add / Edit Master Product Data	Receive Inventory Form						
Add / Edit Master Product Data - Picture	Receive Inventory - Picture						
Edit Master Product Data by Barcode	Move Inventory Form						
Edit Master Product Data by Part	Move Inventory - Picture						
Edit Master Product Data by Description							
Add / Edit Master Product Data - Advanced Form							
Add / Edit Master Product Data - Datasheet							
Add / Edit Current Inventory - Datasheet	Main Menu						
Figur	e 14						

### Master Product Data Forms

hort escriptic

Add / Upate

On hand

Delete Record

You are able to Add or Update PRODUCT records via the screens shown in Figure 15a and b and Figures 16a, b and c.

Track'Em - Product Table - Si	imple 🔀 🖉 Tra	ack'Em – Product Table by Barcod	e - Simple 🗙
Product Number Product Barcode Short Category Reorder Qty Unit of Measure Unit of Measure Category Cat		t Number         1001-A8           Measure         EA           Ory         COMPUTER EQUIP           9 PIN PC CABLE           ption	d Select Picture
Add / Edit Record		Figure 1	56
Track'Em - Product Table by Barcode - Simple  Barcode  Product Number  W	PTrack'Em - Product Table by Part - Sim Product Number   Barcode		roduct Table by Description 2



On Hand

Barcode Unit of M

Category Reorder Qty

Add / Upate

On Hand

Delete Record

Barcode 1001	User Defined Text Field 3	
Product 1001-AB Jumber	User Defined Text Field 4	
escription '	User Defined Text Field 5	· (1888)
Description	Label Filename	
Jnit of EA Measure	Select Label	
eorder 10	Category COMPUTER EQUIP	
ate Last Irdered ast Price \$9.50	User Number 2	C\TrackEm3Files\9pin.jpg
ser efined	User Currency 2 Primary Vendor SEARS	\$0.00 Select Picture
Fext Field 1 Jser Defined Fext Field 2	Alternate Vendor User Yes / No 1 User Yes /	User Date 2
	Add / Update Record Delete 1	Record

Figure 17 illustrates all of the fields available in the PRODUCT table. Many of these fields are user definable (See the SYSTEM ADMIN section). You can change the on-screen descriptions (CAPTIONS) of any of these fields using the SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZIED FIELD CAPTIONS). Your customized caption will be shown on the form views, datasheet views and simple reports.

The SELECT LABEL button (Fig 17) allows you to specify a specific Bartender label template for a specific product number. If you select a label template on this form, it will be used when printing labels via the LABELING MODULE instead of the generic product label template specified on the LABEL SETUP FORM (see Labeling Menu section).

If a field is grayed out and has no caption, then it has been disabled using the HIDE THIS FIELD ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu.

Many of the Track'Em forms (such as any the forms shown the previous page) can be used with the tethered (corded) scanner provided with Track'Em Lite. Merely scan the barcode and the associated database record will appear on the form.

You can add, edit or delete records using the datasheet form (Figure 18). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record. You must move to the next line in order to add the entire record.

# Note: Each PRODUCT record MUST have a unique BARCODE NUMBER. Each record must be assigned a part number, but this field can be the same for more than one record.

	Barcode	Product Number	Short Description	Long Description	Unit of Measure	Reorder Qty	Date Last Order
	1	1	SPROCKET			0	
	1001	1001	WIDGET			0	
Ĵ,	123	123P	Description for 123		EA	10	1/31/2007
	2	2	COPY PAPER			20	
	200001	200001-AB	PRINTER CABLE		EA	20	
*						0	

Figure 18

To delete a record, select that record and press your DELETE key or click the DELETE menu bar button. Keep in mind that you can select which columns to display using the HIDE THIS FIELD

ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu. This feature is discussed in the System Admin section of this manual.

# Note: Adding or Changing INVENTORY RECORDS using the DATASHEET method (Figure 18) will NOT create Inventory History records.

Access 2007 and above will automatically display a calendar for date fields when using Datasheet mode.

Barcode	 Location	Ŧ	Qty		Date Last Updated 🚽 👻
1	456			99	4/17/2007
1	1			96	4/17/2007
1	998			5	🖣 April, 2007 🕨
1	999			1	SMTWTFS
1	123			10	1 2 3 4 5 6 7
123	1			70	8 9 10 11 12 13 14 15 16 17 18 19 20 21
123	998			25	22 23 24 25 26 27 28
				0	<b>29 30</b> 1 2 3 4 5
					6 7 8 9 10 11 12
					Today

Figure 18a

#### **Receive Inventory Forms**

You can receive inventory into the Track'Em system using the following forms. Products can be received into any valid location.

🞑 Track'Em - 🛛	Invento	ry Receive Menu	×	To Inventory Location Barcode 100
To Inventory Location Barcode	200	RECEIVING DOCK	<u>•</u>	Inventory 1001
Inventory	20	LOC 20	-	Barcode Ouantity 10
Barcode	200 21	WAREHOUSE LOC 21		Received
Quantity Received	22 23 24	22 LOC 23 LOC LOC 24		Purchase Order
Purchase Order	25 CR TR1 TR2	LOC 25 COMPUTER ROOM TOOLROOM 1ST FLR TOOLROOM 2ND FLR		Note: Locations that are set to CONSUME inventory are not available in the list of locations shown on this screen
	e set to CONS	SUME inventory are not available in the list of loc		
				✓ Retain last location on drop down after clicking UPDATE
			Figures 19a	and b

Data entered from the INVENTORY RECEIVE screens (Figures 19a and b) will yield the following changes to the database:

- A record is added to INVENTORY table using the TO LOCATION if there are no inventory records with this location. If an inventory record with this location already exists, then the entered quantity is added to the existing quantity.
- A new record is appended to INVENTORY HISTORY table. The FROM LOCATION value of the Inventory History record will read "RECEIPT RECORD".

You have the option of receiving inventory using the LABELING MENU also. A single location can be set to INITIAL LOCATION and automatically entered into the database using the PRINT LABELS option. See the section of this manual titled TRACK'EM LABEL PRINTING MODULE for more information regarding this feature.

#### Move Inventory Forms

Track'Em - Inventory Move Menu		rack'Em - Inventory M	ove Menu	X
Inventory Barcode From Inventory Location Barcode	Locat To In Locat		v 1	×
To Inventory Location Barcode Quantity Moved Update Note: Only current INVENTORY RECORDS (BARCODE and LOCATION) are available to move via this screen. You can move inventory to any LOCATION.	No.	Lipdate ote: Only current INVENTION RECORDS (BARC) move via this screen. You can nove invention the screen investigation of the screen investin of the screen investin of the screen investigation of	XE and LOCATION) are available to any LOCATION.	
	Figures 20a and b			

You can move inventory from one location to another using the following screens.

Data entered using the MOVE INVENTORY screens (Figures 20a and b) will yield the following changes to the database:

- If the TO LOCATION is NOT a CONSUME LOCATION, then a record is added to INVENTORY table using the TO LOCATION if there are no inventory records with this location. If an inventory record with this location already exists, then the entered quantity is added to the existing quantity.
- If the TO LOCATION is a CONSUME LOCATION, then no record is added to the INVENTORY table. NOTE: You can track SHIPMENTS by entering a SHIP TO location and checking the CONSUME box.
- Update the INVENTORY table record for the FROM LOCATION value. The quantity entered on the form is subtracted from the existing quantity to reflect the new quantity. If the new quantity is less than zero or equal to zero, then the record is deleted by default. NOTE: You can optionally set Track'Em to not delete inventory records with zero quantity via the SYSTEM SETUP FORM. You can also elect to keep negative inventory levels. This option is useful if the user needs to physically move items before receiving data is transferred from a scanner.
- Note: Not all locations will be displayed in the FROM LOCATIONS dropdown list box only those locations that actually contain the item selected.
- A new record is appended to INVENTORY HISTORY table.

#### Inventory Reports Menu

The INVENTORY REPORTS MENU (Figure 21) contains ready to use reports. Track'Em report formats can be modified if you own a full version copy of Access 2003 or above. Consult your Access documentation regarding report modifications. If you are using the run time version of Access provided with Track'Em, you do not have the ability to make changes to the format of these reports.



#### Product Master Table Reports

Figures 22a – e illustrate the Product Master Table reports. The ON HAND value is a summation of all INVENTORY records associated with the product record in the Product Master table. All other fields are taken directly from the Product Master Table.

Of the Product Master Table report options, only the Products By Description report provides an option to include / exclude pricing values. Keep in mind that Product Master Table reports show ALL products records including products with ZERO on-hand inventories.

Each of the CURRENT INVENTORY reports show only products with on-hand inventory and the option to include / exclude pricing.

Track'Em - Products Sorted by Description Report						
Short Description	Product Number	Barcode	On Hand			
3/8" NUT	123P	123	0			
COPY PAPER	2	2	0			
PRINTER CABLE	200001-AB	200001	0			
RS-2329 PIN FEMALE	1001	1001	2			
SPROCKET	1	1	0			

Figure 22a

Track'Em - Prod	lucts Sorted by D	escriptio	on Report				
Set this line from Advanced System Admin Menu							
Short Description	Product Number	Barcode	Price Eac	ch / Value	On Hand		
9 PIN PC CABLE	1001-AB	1001	\$9.500	\$0.00	0		
PRODUCT 1	1	1	\$1.250	\$6.25	5		
product 12-xxxx	12-xxxx	123456	\$15.000	\$240.00	16		
product 2	2	2	\$1.000	\$1.00	1		
			Total	\$247.25			

Figure 22b

Track'Em - Products Sorted by Product Number Report						
Short Description	Product Number	Barcode	On Hand			
SPROCKET	1	1	0			
RS-2329 PIN FEMALE	1001	1001	2			
3/8" NUT	123P	123	0			
COPY PAPER	2	2	0			
PRINTER CABLE	200001-AB	200001	0			

Figure 22c

Track'Em - Products Sort by Barcode Number Report					
Barcode	Product Number	Short Description	On Hand		
1	1	SPROCKET	0		
1001	1001	RS-232 9 PIN FEMALE	2		
123	123P	3/8" NUT	0		
2	2	COPYPAPER	0		
200001	200001-AB	PRINTER CABLE	0		



Product Num	ıber	Barcode	On Hand
Category MISC HARDV	VARE		
1	SP ROCKE T	1	1
123P	3/8" NUT	123	I
		On Hand by Category	I
Category OFFICE SUP	PLIES		
2	COPYPAPER	2	
		On Hand by Category	
Category PCCABLE			
1001	RS-232 9 PIN FEMALE	1001	:
200001-AB	PRINTER CABLE	200001	1
		On Hand by Category	

Figure 22e

#### **Current Inventory Reports**

Current inventory reports are provided that allow you to view all current inventory records or drill down and show current inventory levels by specific LOCATION, PRODUCT (product number and/or barcode number), VENDOR, CATEGORY, or DEPARTMENT. Each report can be run with or without pricing values displayed. The selection forms and report examples are shown below.



Figure 23a

Track'En	Track'Em - Inventory by Location					
Set this li	ne fr	om Adva	nced System Admin Men	и		
Inventory Info (1	Barcode, I	Product Numbe	r, Desc)	Qty		
Location	100	RE	CEIVING DOCK			
1001001		1001001	COPYPAPER	24		
Location	200	W	AREHOUSE			
1001001		1001001	COPYPAPER	144		
Location	TR1	то	OLROOM 1ST FLR			
1003		1003	3/8" NUT	12		
278		278-300	3/8" WASHERS	12		

Figure 23b

	Track'Em - Inventory by Location Set this line from Advanced System Admin Menu						
		uct Number, Desc)	Price Each	Value	Qty		
Location	100	RECEIVING DOCK					
1001001	1001001	COPYPAPER	\$20.000	\$480.00	24		
			SubTotal Value - Location	\$480.00			
Location	200	WAREHOUSE					
1001001	1001001	COPYPAPER	\$20.000	\$2,880.00	144		
			SubTotal Value - Location	\$2,880.00			
Location	TR1	TOOLROOM 1ST FLR					
1003	1003	3/8" NUT	\$15.000	\$180.00	12		
278	278-300	3/8" WASHERS	\$3.000	\$36.00	12		
			SubTotal Value - Location	\$216.00			
			Total Value - All Locations	\$3,576.00			

Figure 23d

Select Product t		Listbox Sort O Barcode N Product N Product D	Number Jumber
Barcode	Prod	uct Number	Short Description
1001	1001 1001		9 PIN PC CABLE
1001001	1001001 1001		COPY PAPER
1002	9100	2	SPROCKET
1003	1003		3/8" NUT
12345678901234	123		EXTRA LONG BARCODE
278 278-300		300	3/8" WASHERS
, 	M	Include Invento	ory Value in Report
Inventor Selecte			Inventory Report for All Products

Figure 24a

Track'Em - Inventory by Product Number Set this line from Advanced System Admin Menu							
Product Number Information Product Number, Barcode, Description				Qtv	Date Last Updated		
1001001	1001001	COPYPAPER					
Location	100	RECEIVING DOCK		24	02-Aug-10		
Location	200	WAREHOUSE		144	22-Jul-10		
			Sum	168			
1003	1003	3/8" NUT					
Location	TR1	TOOLROOM 1ST FLR		12	03-Aug-10		
			Sum	12			
278-300	278	3/8" WASHERS					
Location	TR1	TOOLROOM 1ST FLR		12	03-Aug-10		
			Sum	12			

Figure 24b

	mber Informa Number, Barco	tion ode, Description		Qtv	Price Each	Value	Date Last Update d
1001001	1001001	COPYPAPER					
Location	100	RECEIVING DOCK		24	\$20.000	\$480.00	02-Aug-10
Location	200	WAREHOUSE		144	\$20.000	\$2,880.00	22-Jul-1
			Sum	168	SubTotal Value	\$3,360.00	
1003	1003	3/8" NUT					
Location	TR1	TOOLROOM 1ST FLR		12	\$15.000	\$180.00	03-Aug-10
			Sum	12	SubTotal Value	\$180.00	
278-300	278	3/8" WASHERS					
Location	TR1	TOOLROOM 1ST FLR		12	\$3.000	\$36.00	03-Aug-10
			Sum	12	SubTotal Value	\$36.00	
					Total Value	\$3,576.00	

Figure 24c

	Track'Em - Inventory by Barcode Set this line from Advanced System Admin Menu						
Barcode	P	roduct Num	ber		Qty	Date Last Up dated	
1001001	1	001001	COPYPAPER				
	Location	100	RECEIVING DOCK		24	02-Aug-10	
	Location	200	WAREHOUSE		144	22-Jul-10	
				Sum	168		
1003	1	003	3/8" NUT				
	Location	TR1	TOOLROOM 1ST FLR		12	03-Aug-10	
				Sum	12		
278	2	78-300	3/8" WASHERS				
	Location	TR1	TOOLROOM 1ST FLR		12	03-Aug-10	
				Sum	12		

Figure 25b

Track'Em - Inventory by Barcode Set this line from Advanced System Admin Menu								
Barcode		Product Num	ıber		Qty	Price Each	Value	Date Last Up dated
1001001		1001001	COPYPAPER					
Location	100	RECEIVI	NG DOCK		24	\$20.000	\$480.00	02-Aug-10
Location 200	WAREH	DUSE		144	\$20.000	\$2,880.00	22-Jul-10	
				Sum	168	SubTotal Value	\$3,360.00	
1003		1003	3/8" NUT					
Location	TR1	TOOLRO	OM 1ST FLR		12	\$15.000	\$180.00	03-Aug-10
				Sum	12	SubTotal Value	\$180.00	
278		278-300	3/8" WASHERS					
Location	TR1	TOOLRO	OM 1ST FLR		12	\$3.000	\$36.00	03-Aug-10
				Sum	12	SubTotal Value	\$36.00	

Figure 25c



Figure 26a



Figure 26b

Track'Em - Inventory by Category Set this line from Advanced System Admin Menu							
			9	Qty Price Each	Value	Date Last Updated	
Category	COMPUTER E	QUIP					
1003	1003	3/8" NUT					
Locatio	n TR1	TOOLROOM 1ST FLR	12	\$15.000	\$180.00	03-Aug-10	
		Sum by Category =	12	SubTotal Value	\$180.00		
Category	OFFICE SUPP	LIES					
1001001	1001001	COPYPAPER					
Locatio	an 200	WAREHOUSE	144	\$20.000	\$2,880.00	22-Jul-10	
Locatio	<b>m</b> 100	RECEIVING DOCK	24	\$20.000	\$480.00	02-Aug-10	
		Sum by Category =	168	SubTotal Value	\$3,360.00		
Category	TOOLS						
278-300	278	3/8" WASHERS					
Locatio	n TR1	TOOLROOM 1ST FLR	12	\$3.000	\$38.00	03-Aug-10	
		Sum by Category =	12	SubTotal Value	\$36.00		

Figure 26c

# Reorder Reports Menu

If you set a reorder quantity for a product number, you can take advantage of the REORDER REPORTS. This value is set via the MASTER PRODUCT DATA FORMS.

Reorder Reports Menu
THIS IS MY COMPANY
Track'Em™ - Version 3, 18 - Copyright by RVB Systems Group - All Rights Reserved
Inventory Reorder Now Report
- Inventory Reorder - All Products
- Inventory Reports Menu
Inventory Reports Menu
Figure 27

Track'Em - Product Reorder Report						
Product Nu	mber Short Description	Barcode	Reorder Qty	On Hand		
1001	RS-232 9 PIN FEMALE	1001	3	2		
2	COPYPAPER	2	20	10		
200001-AB	PRINTER CABLE	200001	20	0		



Track'Em - All Products Reorder / On Hand Report							
Product Nu	mber Short Description	Barcode	Reorder Qty	On Hand			
1	SPROCKET	1	0	5			
1001	RS-232 9 PIN FEMALE	1001	3	2			
123P	3/8" NUT	123	10	100			
2	COPY PAPER	2	20	10			
200001-AB	PRINTER CABLE	200001	20	0			

Figure 28b

#### Inventory by Vendor Reports

The Inventory by Vendor option allows you to create reports by either the primary vendor or secondary vendor for consumable items. You can run reorder report by selected or all vendors as well as on-hand inventory by selected or all vendors. Products without the vendor field(s) completed will not appear in these reports.



Figure 29a

Reorder Report by Primary Vendor								
Set this line from Advanced System Admin Menu								
Barcode	Product Number	Short Description	Reorder Qty	Qty on Hand				
Vendor U	NITED DISCOUNTERS							
1002	1002	SPROCKET	12	0				
1003	1003	3/8" NUT	20	12				
Vendor U	IS SUPPLY							
1001	1001-AB	9 PINPC CABLE	10	0				
278	278-300	3/8" WASHERS	144	12				



Innante			Product Number, Desc)	stem Admin Menu	Value	Qty
Vendor	US SUF		Tounci Ivaniber, Descj	The Luch	• uure	Qıy
Location	100		RECEIVING DOCK			
100100	1	1001001	COPY PAPER	\$20.00	\$480.00	24
Location	200		WAREHOUSE			
100100	1	1001001	COPY PAPER	\$20.00	\$2,880.00	144
Location	TR1		TOOLROOM 1ST FLR			
278		278-300	3/8" WASHERS	\$3.00	\$36.00	12
				SubTotal Value - Vendor	\$3,396.00	
Vendor	UNITED	DISCOUNTE	RS			
Location	TR1		TOOLROOM 1ST FLR			
1003		1003	3/8" NUT	\$15.00	\$180.00	12
				SubTotal Value - Vendor	\$180.00	
				Total Value - All Vendors	\$3,576.00	

#### Inventory History Reports Menu

INVENTORY HISTORY records are created whenever inventory is received or moved (including consumed / shipped). These records stay in the database until they are deleted manually or deleted via the DELETE INVENTORY HISTORY option from the SYSTEM ADMIN MENU. Note: You have the option to display both the DATE and TIME a history record was created or just the DATE. Consult the System Setup section of this manual.

Inventory History Reports Menu
My Company Name Here
Track'Em™ - Version 3.13 - Copyright by RVB Systems Group - All Rights Reserved
Add / Edit Inventory History - Datasheet
Inventory History by To
Location Reports
Inventory History by To and/or From Location Reports
Inventory History by Category Reports
Inventory History by
Department Reports
Inventory Reports Menu
Figure 30a

The USER field in Figure 30b will only contain data if the REQUIRE PASSWORD ENTRY AT STARTUP ON PC and / or REQUIRE USER ID ON PORTABLE SCANNER checkboxes are selected. See the SYSTEM ADMIN MENU section for more information.

The FROM LOCATION will always read "RECEIPT RECORD" for receiving records. The PURCHASE ORDER field is an optional entry on the receiving forms as well as the portable scanner.

	From Location	To Location	Qty	Date Record Added	Barcode	Last Price	User	From Scanner?	PurchaseOrder
•	123	456	1	3/28/2007	1001	\$0.00			
	456	123	2	3/29/2007	2	\$0.00			
	RECEIPT RECORD	123	2	3/28/2007	1001	\$0.00			125000
	RECEIPT RECORD	456	100	3/29/2007	123	\$0.00			
	RECEIPT RECORD	456	10	3/29/2007	2	\$0.00			
	RECEIPT RECORD	123	5	3/29/2007	1	\$0.00			
*			0			\$0.00			

Figure 30b

Access 2007 and above will automatically display a calendar for date fields when using Datasheet mode.

Barcode 🚽	Location 👻	Qty 👻	Date Last Updated 👻
1	456	99	
1	1	96	4/17/2007
1	998	5	🚽 April, 2007 🕨
1	999	1	SMTWTFS
1	123	10	
123	1	70	8 9 10 11 12 13 14 15 16 17 18 19 20 21
123	998	25	22 23 24 25 26 27 28
		0	
			6 7 8 9 10 11 12
			Today

Figure 31

You can add, edit or delete records using the datasheet form (Figure 30b). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record.

To delete a record, select that record and press your DELETE key or click the DELETE menu bar button. Keep in mind that you can select which columns to display using the HIDE THIS FIELD ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu. This feature is discussed in the System Admin section of this manual.

Figures 32a and 32b illustrate 2 of the 5 different methods of reporting Inventory History records. You can specify a specific LOCATION, PRODUCT NUMBER, BARCODE, CATEGORY, or DEPARTMENT. You can also select a date range and/or include pricing information in the reports. Figures 33a, b and c illustrate several different inventory history reports.

🔛 Track'Em - Inv	entory Histo	ory					
Select Product Product Sort Order Barcode Number Product Number Product Description	Barcode 1001001 1002 278	Product Number 1001001 91002 278-300	Description COPY PAPER SPROCKET 3/8" WASHERS				
Select To Location	100 200	RECEIVING DOC WAREHOUSE	к				
Selected Pr Selected			ted Products by ery Location				
All Products I Loca		All Pro	oducts by Every Location				
Note: Click SELECT DATE buttons to display or hide calendar. Double click desired date on calendar to select and hide calendar.							
_	ventory Value	•					
Select Dat	e Range for R	eport (Date rec	ord created)				
Select Start Date		Select E	nd Date				

Figure 32a

🔛 Trac	:k'Em - Inve	entory Histo	ory by	Categ	lory		
Select Product Product Sort Order Barcode Number Product Number Product Number Product Description Select Category Checked = SORT BY CONE		1001001 100 1002 910 278 274 2 A T		t Number )1 0	Description COPY PAPER SPROCKET 3/8" WASHERS		
BYCOD	E Selected Pr Selected (				ted Products by ery Category		
	All Products by Selected Category Note: Click SELECT DATE buttons to display o			All Products by Every Category			
Include Inventory Value in Report  Select Date Range for Report (Date record created)  Select Start Date  Select End Date							

Figure 32b





Track'Em - Inventory History - Sorted by Category / Location /									
Barco	de / Date								
		Product	Qty	Date	User From PO Scanner				
Category	MISC HARDWARE								
To Location	123	TOP SHELF - WAREHOUSE			_				
1	1	SPROCKET	5	29-Mar-07					
		Location Sum	5						
To Location	456	BOTTOM SHELF - WAREHOUSE							
123	123P	3/8" NUT	100	29-Mar-07					
		Location Sum	100						
		Category Sum	105						
Category	OFFICE SUPPLIES								
To Location	123	TOP SHELF - WAREHOUSE			_				
2	2	COPY PAPER	2	29-Mar-07					
		Location Sum	2						
To Location	456	BOTTOM SHELF - WAREHOUSE							
2	2	COPY PAPER	10	29-Mar-07					
		Location Sum	10						
		Category Sum	12						
	PC CABLE								
To Location	123	TOP SHELF - WAREHOUSE			_				
1001	1001	RS-232 9 PIN FEMALE	2	28-Mar-07	125000				
		Location Sum	2						
To Location	456	BOTTOM SHELF - WAREHOUSE							
1001	1001	RS-232 9 PIN FEMALE	1	28-Mar-07					
		Location Sum	1						
		Category Sum	3						

Figure 33b

Track'Em - Inv Location, Barco Set this line fro	entory History by ode, Date m Advanced Syste	Selected m Adm	l Red in M	cords - Tenu	Sorted by
Product (Barcode)		Qty	Price / Value		Date
Job WAREHOUSE					
1002	SPROCKET	10	\$2.50	\$25.000	21-Jul-10
	Sub Total	10		\$25.00	
	Total	10		\$25.00	

Figure 33c

#### Cycle Count History Reports

Cycle Count History records are only added from the portable scanner. Data entered from the CYCLE COUNT screen on the portable scanner will yield the following changes to the database:

- The existing INVENTORY table record (based on barcode number and location) is updated to reflect the new quantity. If no INVENTORY record exists for this barcode / location code combination, then one is added.
- If the PRODUCT and/or LOCATION do not exist, the user can add their descriptions on the scanner and they are added to the database (unless the ADD NEW PRODUCTS / LOCATIONS WHEN LOADING PDT DATA settings are not checked see SYSTEM ADMIN section).
- A new record is added to the INVENTORY CYCLE HISTORY table. The FROM LOCATION will read "CYCLE COUNT RECORD" and the TO LOCATION will be where the counted inventory was located. The original quantity for that item / location is recorded.

Figure 34a illustrates the Add / Edit Cycle Count History Datasheet option. The USER field will only contain data if the REQUIRE USER ID ON PORTABLE SCANNER is selected.

	From Location	To Location	Qty	Date Record Added	Barcode	User	From Scanner?		
I	CYCLE COUNT RECORD	123	2	3/29/2007	1001		<ul> <li>Image: A start of the start of</li></ul>		
	CYCLE COUNT RECORD	123	5	3/29/2007	1		<b>~</b>		
Э	*		0						
_	Eigure 34a								

Figure 34a

You can add, edit or delete records using the datasheet form (Figure 34a). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record.

To delete a record, select that record and press your DELETE key or click the DELETE menu bar button. Keep in mind that you can select which columns to display using the HIDE THIS FIELD ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu. This feature is discussed in the System Admin section of this manual.

Figures 34b and c illustrate 2 CYCLE COUNT HISTORY options.

🚰 Track'Em - (	Cycle Count	t History Rep	oorts	X		
Select Product	Barcode	Product Number				
_Sort by	1001	1001-AB	9 PIN PC CABLE			
Barcode	1002	91002	SPRO			
C Product Number	1003	1003	3/8" N	101		
_						
O Description	1	COMPUTER EOU	ITP			
Select Category	2	A TOOLS				
Checked = SORT	[-					
BY CODE						
Cycle Count Histor				Cycle Count History by Selected		
Product(s) /				Product(s) and All Categories		
Categor	y(s)					
Cycle Count His	story by All			Curls Count Illisters by All		
Products and	Selected			Cycle Count History by All Products and All Categories		
Categor	y(s)			Troducts and Air categories		
	🗏 Sele	ct Date Range	for Re	eport		
Select Start Date				Select End Date		
Note: Only Barcodes and	l locations associate	ed with CYCLE COUN	T HISTO	DRY RECORDS are available via this screen.		
Note: Click SELECT DATE buttons to display calendar. Double click desired date on calendar to hide calendar.						

Figure 34b

Track Barco		•	le Count History -	Sorted	by Lo	ocat	tion,	
P	rodu	ict Number		New Qty	Origina	l Qty	Date	User
To Location	1		LOCATION 1					
2863		2863	123		1	1	01-Apr-08	NOT USED
To Location	2							
333		333	ITEM 333		25	24	01-Apr-08	NOT USED

Figure 34c

#### Assets Data Entry Menu

Track'Em defines ASSETS as items that are uniquely numbered, like computers, documents or tools. ASSET records contain information about a specific ASSET, including its current location and status. ASSET HISTORY records show where an asset has been and what its status was at that time.

Assets Data Entry Menu	
THIS IS MY	COMPANY
Track'Em™ - Version 3.18 - Copyright by	RVB Systems Group - All Rights Reserved
Add Assets	Move Assets
Add / Edit Assets	Move Assets - Picture
Add / Edit Assets - Picture	
Add / Edit Assets - Advanced	
Add / Edit Assets - Datasheet	
	Main Menu
E'	

Figure 35

#### Add / Edit Asset Information

There are 5 different PC screens for adding or editing ASSET records. They are shown below.

🛛 Track'Em - Assets 💦 🔀	Track	'Em - Assets 🛛 🔀
Barcode Asset Description	Barcode Asset Description	100001
Location		•
Category 🔽	Location	TOP SHELF - WAREHOUSE
Status	Category	
Note: DUE DATE is calculated using CHECK OUT DATE	Status	×
and CHECK OUT PERIOD. Track Em will look for a CHECK OUT PERIOD value in the following order: ASSET RECORD, CATEGORY RECORD, SETUP TABLE and use the 1st value found.	Check Out F	Period in Days 7
Add Record	Add / Upda	te Scrap Asset Delete Record

Figures 36a and b

Scraping an Asset changes its SCRAP field value from FALSE to TRUE. This action also writes a record to the ASSET HISTORY table. The word 'SCRAP' is written to the TO LOCATION and the STATUS field in the history table.

Whenever you change the LOCATION or STATUS of an existing Asset, a record is written to the Asset History table. If the asset is a KIT, then records for any assets or inventory associated as a component with this asset (kit) will be modified and appropriate history records will be created. See the KIT MENU section for more information about kits.

Track	'Em - Assets	×
Barcode	100001	
Asset Description	7 LCD Monitor	*
Location	TOP SHELF - WAREHOUSE	~
Category	PCMONITOR	~
Status	In Service	~
Check Out F	Period in Days 7	
Add / Upda	te Delete Record Scr	ap Asset
	Select Picture	
NE		

Figure 37

Barcode 100001	Asset Description Long	This field can be used for extra long descriptions. The ASSET DESCRIPTION field is limited	Select Label	Label Name	C:\TrackEm3Files\As elPro.btw	
Asset 17" LCD MC Description	INITOR	to 20 characters which are displayed on the portable	2	Location Status	COMPUTER ROOM	•
		scanner.		Dept	QUALITY CONTROL	. The second sec
Make	)			Category	COMPUTER EQUIP	
Model Desc Model # 101	Additional	Track'Em provides extra fields which can be used to hold any	-	User Num 1		0
Serial		data you desire		User Num 2		0
Date Acquired	Additional Info 2	Change the descriptions of user defined field on the Advanced System Admin Menu	-	User Date Dailv charge		\$0.00
Purchase Price	\$395.00 Additional		-	User Boolean		
Depreciation Method	Info 3			Check Out Per	riod in Days	0
Depreciable	Additional Info 4			Date Last Che Due Date	cked Out	
Salvage Value	\$0.00			Times Checke	d Out	0
Current Value	Additional \$295.00 Info 5		-	Last Updated Vendor	8/9/2010 10.3	38:36 AM
Comments Track'Em allow	s you to hide un-used fields			ect Picture	NEW	
			Monito			
Next Sched Maintenance	Add / Update Record	Delete Record Scrap	Scanne Update PC sinc reset	don		

Figure 38

Figure 38 illustrates all of the fields available in the ASSET table. Many of these fields are user definable (See the SYSTEM ADMIN section). You can change the on-screen descriptions (CAPTIONS) of any of these fields using the SYSTEM ADMIN / ADVANCED SYSTEM ADMIN MENU / CUSTOMIZE FIELD CAPTIONS). Your customized caption will be shown on the form views, datasheet views and simple reports.

The SELECT LABEL button (Fig 38) allows you to specify a specific Bartender label template for a specific asset. If you select a label template on this form, it will be used when printing

labels via the LABELING MODULE instead of the generic asset label template specified on the LABEL SETUP FORM (see Labeling Menu section).

If a field is grayed out and has no caption, then it has been disabled using the HIDE THIS FIELD ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu.

	Barcode	Asset Description	Asset Description Long	Location Number
•	100001	17" LCD Monitor		1003
*				
			Figure 39	

You can add, edit or delete records using the datasheet form (Figure 39). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record.

To delete a record, select that record and press your DELETE key or click the DELETE menu bar button. Keep in mind that you can select which columns to display using the HIDE THIS FIELD ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu. This feature is discussed in the System Admin section of this manual.

# Note: Adding or Changing ASSET RECORDS using the DATASHEET method (Figure 39) will NOT create ASSET History records or automatically modify the LAST UPDATED and SCANNED / UPDATED SINCE LAST RESET fields in the Asset table.

#### Move Assets (Change Asset Location / Status)

Data entered from the MOVE ASSET screens (Figure 40a and b) will yield the following changes to the database:

- The existing ASSET table record is updated with the new LOCATION and STATUS CODE. The lookup key is the ASSET BARCODE NUMBER. The SCANNED / UPDATED SINCE LAST RESET flag is set to TRUE.
- If the new location has a CHECKED OUT value of TRUE, then the asset will be considered Checked Out. A new Due Date will be calculated based upon current date / time, the CHECK OUT PERIOD, the MINUTES GRACE value, and the Weekend and Grace Day settings. Consult the Check In / Check Out section of this manual for more information regarding these settings. Track'Em will look for a CHECK OUT PERIOD value in the following order: ASSET RECORD, CATEGORY RECORD, SETUP TABLE and use the 1st value found.
- If the new location has a CHECKED OUT value of FALSE, then the asset will be considered Checked In.
- A new record is appended to the ASSET HISTORY table. This record will include the asset's previous location as well as new location. For CHECK IN records, it will also include the DUE DATE and a T/F value for "CHECKED IN OVERDUE?".
- If the asset is a KIT, then records for any assets or inventory associated as a component with this asset will be modified and appropriate history records will be created. See the KIT MENU section for more information about kits.

A Track'Em - Fixed A	ssets Move Menu	50	ε
Asset Location Barcode	ſ	•	
Asset Barcode	[	•	
Asset Status (Optional Entry)		•	
	Update		
🔽 Retain la	st location on drop down after clicking UPDATE		
	Figure 40a		

arcode	CR	
sset Barcode	100001	•
sset Status Optional Entry)	300	•
	Update	

#### Assets Reports Menu

The ASSETS REPORTS MENUs (Figure 41) contains ready to use reports showing the current status of assets and all recorded changes to assets' location or status (Asset History reports).



Figure 41

#### All Assets Reports

The first 2 asset reports show all assets along with their associated location and status.

Set thi Asset Descr		Barcode	Loc	ation	
16" SONYMO	NITOR	100002	CR		COMPUTER ROOM
		100002	0.11	Status	PROJECT ABC
17" LCD MON	TOR	100001	CR	010105	COMPUTER ROOM
				Status	PROJECT ABC
HAMMER DRI	LL	1201	TR1		TOOLROOM 1ST FLR
				Status	NEEDS REPAIR
TEST RECOR	D	1	301		TRUCK 301
				Status	
		Total Assets			4
Track'	Em - Assets Sor	Figure 42a	ode	Num	ber Report
	Em - Assets Sor s line from Adva	ted by Barc			-
		ted by Barc	m A		-
Set this	s line from Advo	ted by Bard anced Syste	m A	dmin	-
Set this	s line from Adve Asset Description	ted by Barc anced Syste Locat	m A	dmin	Menu
Set this Barco de	s line from Adve Asset Description	ted by Barc anced Syste Locat	m A ion	dmin TRU	Menu
Set this Barco de	s line from Adva Asset Description TEST RECORD	cted by Barc anced Syste Locat 301 CR	m A ion	dmin TRU COM	<b>Menu</b> <sup>CK 301</sup>
<b>Set this</b> Barco de 1 100001	s line from Adva Asset Description TEST RECORD	cted by Barc anced Syste Locat 301 CR	m A ion Status	dmin TRU COM PRO	Menu CK 301 PUTER ROOM
Set this Barco de 1 100001	S line from Advo Asset Description TEST RECORD 17"LCD MONITOR	eted by Barc anced Syste Locat 301 CR CR	m A ion Status	dmin TRU COM PRO COM	Menu CK 301 PUTER ROOM JECT ABC
Set this	S line from Advo Asset Description TEST RECORD 17"LCD MONITOR	eted by Barc anced Syste Locat 301 CR CR	m A ion Status Status	dmin TRU COM PRO COM	Menu CK 301 PUTER ROOM JECT ABC PUTER ROOM

Figure 42b

#### Assets by Selection Reports

You can run filtered reports on the asset records by Category, Department, Location, Status or Model Number. In additional, each one of these options gives you the opportunity to view all assets as well as include the current value for each asset record. You are also able to view assets that are now in a different current location than they were originally (Figure 43e).

Note: The MODEL NUMBER field in the Asset table and the PRODUCT NUMBER field in the Product table must match in order to run the Assets by Model Number report.

A Track'Em - Assets by Selec	tion	23
Select Grouping Me	thod Checked = SORT LIST BY CODE Unchecked = SORT LIST BY DESCRIPTION	
C By Department C By Location C By Status	Reset PREVIOUS LOCATION CODE to the CURRENT LOCATION CODE for selected locations.	
G By Model (Part) Number	Reset for ALL LOCATIONS	
Select Category		
1 COMF	UTER EQUIP	
2 A TO	DLS	
3 OFFIC	E SUPPLIES	
4 FICTO	IN BOOKS	
5 NON-1	ECTION BOOKS	
,	Im Include Asset Value in Report	
Asset Report for Selected Categories	Assets in New Location Report for Selected Categories Asset Report for Categories	All







	Em - Assets by Statu line from Advancea			
Barco de		Locati	ion	Current Value
Status 100	NEEDS REPAIR			
1201	HAMMER DRILL	TR1	TOOLROOM 1ST FLR	\$90.00
	Total Assets in this Status =	1	Total Value of Assets in this Category	\$90.00
Status 300	PROJECT ABC			
100002	16" SONY MONITOR	CR	COMPUTER ROOM	\$350.00
100001	17" LCD MONITOR	CR	COMPUTER ROOM	\$295.00
	Total Assets in this Status =	2	Total Value of Assets in this Category	\$645.00
	Total Number of Assets =	2	Total Value of Assets	\$735.00

Figure 43c



Figure 43d

Track'Em - Assets in New Location by Category Report Set this line from Advanced System Admin Menu A TOOLS Category 2 1201 HAMMER DRILL Current Location TR1 TOOLROOM 1ST FLR FRONT STOCK ROOM Previous Location 44 Status 100 NEEDS REPAIR Number of Assets in This Category = 1 COMPUTER EQUIP 1 **Category** 100001 17" LCD MONITOR Current Location CR COMPUTER ROOM BACK LOT Previous Location 2 Status 300 PROJECT ABC Number of Assets in This Category = 1 Total Number of Assets = 2

Figure 43e

#### Assets by Date Reports

Track'em is provided with 2 asset reports that are associated with dates: Date Acquired and Next Scheduled Maintenance Date. Only asset records that contain dates in either of these fields are included in the reports.

			by Date Acquired Report set Records with valid DATE ACQUIRED value
Date Acquired	-	Asset Description	7 4 104 5 14
1/31/2007 10	00001	17" LCD Monitor	CONFERENCE ROOM Out of Service
		-	Total Number of Assets = 1
			Figure 44a
Track'En	n - Ass	ets Sorted	Figure 44a
Track'En Maintena			
Maintena	ance R	eport	
Maintena	<b>INCE R</b> te: Report o	eport	by Next Scheduled
Maintena Not Next Sched Ba Maintenance	te: Report o Barcode	eport nly includes Assets	by Next Scheduled swith a Scheduled Maintenance Date

Figure 44b

Assets Scanned / Updated Since Last Reset

These reports allow you to see a list of assets that have either been scanned or not been scanned since the last time the SCANNED / UPDATED field was reset. This field can be reset from the ASSETS REPORTS MENU.

Track'Em
This option will set the field 'ASSET UPDATED / SCANNED SINCE LAST RESET' to FALSE (UN-CHECKED). Are you sure you want to continue?
Yes No
Figure 45c
Frack'Em - Assets Scanned / Updated R X          Select       V         Location       Assets by Selected
Scanned / Updated Status  C Assets Scanned / Updates since last reset  C Assets NOT Scanned / Updated since last reset

Figure 45d

Track'	Em - Assets by	All Location	s Re	por	t	
Set thi	s line from Adv	anced Syster	n Ad	lmin	n Menu	
Location	Barco de	Updated / Sci since last res				
CR	COMPUTER RO	OM				
100002	16' SONY MONITOR	2	Status	300	PROJECT ABC	
100001	17' LCD MONITOR		Status	300	PROJECT ABC	
		Number of Assets in t	his Locat	ion =	2	
TR1	TOOLROOM 1S	T FLR				
1201	HAMMER DRILL		Status	100	NEEDS REPAIR	
		Number of Assets in t	his Locat	ion =	1	
		Total Number of Asse	ts =		3	

Figure 45e

#### Asset History Datasheet

A record is added to the Asset History table whenever an Asset is moved to a new location or given a new status from one of the Add / Edit Asset screens or one of the Move Assets screens. A record is also added to the Asset History table whenever an asset is assigned a new location and/or status on the portable scanner. Lastly, a record is added to the Asset History table whenever using an asset is scrapped using any of the SCRAP ASSET buttons on Figures 36b, 37 or 38.

	Barcode	Location Code	Status Code	When Entered	User	From Scanner?	Date Started	From Location
►	1	123		6/10/2008 1:18:47 PM	NOT USED		6/5/2008	201
	100001	1003	100	6/10/2008 1:19:03 PM	NOT USED		6/6/2008	123
	1	201		7/5/2008 4:37:13 PM	NOT USED		7/5/2008	123
	999	SCRAP	SCRAP	7/5/2008 4:37:13 PM	NOT USED		7/5/2008	SCRAP
	999	123		4/2/2008 1:24:01 PM	1		3/21/2008	123
	1	123		7/7/2008 1:23:55 PM	1	<b>~</b>	7/1/2008	123
	1	201		7/5/2008 2:49:12 PM	NOT USED		7/5/2008	123
	1	SCRAP	SCRAP	7/5/2008 4:32:15 PM	NOT USED		7/5/2008	201
	999	SCRAP	SCRAP	7/5/2008 4:32:15 PM	NOT USED		7/5/2008	201

Figure 46

Access 2007 and higher will automatically display a calendar for date fields when using Datasheet mode.

Barcode	+ Location +	Qty 👻	Date Last Updated 👻
1	456	99	4/17/2007
1	1	96	4/17/2007
1	998	5	🖣 April, 2007 🕨
1	999	1	SMTWTFS
1	123	10	1 2 3 4 5 6 7
123	1	70	8 9 10 11 12 13 14 15 16 17 18 19 20 21
123	998	25	22 23 24 25 26 27 28
		0	<b>29 30</b> 1 2 3 4 5
			6 7 8 9 10 11 12
			Today
			(2)

Figure 46a

You can add, edit or delete records using the datasheet form (Figure 46). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record.

To delete a record, select that record and press your DELETE key or click the DELETE menu bar button. Keep in mind that you can select which columns to display using the HIDE THIS FIELD ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu. This feature is discussed in the System Admin section of this manual.

These records stay in the database until they are deleted manually or deleted by the DELETE ASSET HISTORY option from the SYSTEM ADMIN MENU.
## Asset History Reports

Figure 47a shows 1 of the 3 different methods of reporting Asset History records. You can specify a specific LOCATION, STATUS, DEPARTMENT MODEL NUMBER or CATEGORY. You can also select a date range as shown in Figure 47b. Note: You have the option to display both the DATE and TIME a history record was created or just the DATE. Consult the System Setup section of this manual.

Track'Em - Asset History by Location						
Select Asset	1 100001	16" SONY MONITOR 17" LCD MONITOR				
Select Location	1	COMPUTER ROOM TEST LOCATION				
	ed Assets by cted Location	Selected Assets by Every Location				
	All Assets by Selected Location Location					
Note: Click SELECT DATE buttons to display or hide calendar. Double click desired date on calendar to select date and hide calendar.						
Select Date Range for Report (Date record created)           Select Start Date         Select End Date						
		Figure 47a				

The USER field in Figure 48a will only contain data if the REQUIRE PASSWORD ENTRY AT STARTUP ON PC and / or REQUIRE USER ID ON PORTABLE SCANNER checkboxes are selected. See the SYSTEM ADMIN MENU section for more information

Asset		Statu	is Code	From Date Scanner User
1001	OFFICE 1001			
100002	16" Monitor - Sony	100	In Service	30-Mar-07 🗖
Co	unt per Location	1		
1002	OFFICE 1002			
100003	16" Monitor - Sony	100	In Service	30-Mar-07 🗖
Count per Location		1		
1003	CONFERENCE ROOM			
100001	17" LCD Monitor			29-Mar-07 🗖
100001	17" LCD Monitor			29-Mar-07 🗖
100001	17" LCD Monitor	200	Out of Service	30-Mar-07 🗖
Co	unt per Location	3		
SCRAP				
100001	17" LCD Monitor	SCRAP		29-Mar-07 🗖
100001	17" LCD Monitor	SCRAP		29-Mar-07 🗖
100001	17" LCD Monitor	SCRAP		29-Mar-07 🗖
Co	unt per Location	3		
	Total Count	8		

Figure 48a

Status	Asset		Location		Date From Scanner	Use
100001	17" LCD Monitor		1003	CONFERENCE ROOM	29-Mar-07 🔲	
100001	17" LCD Monitor		1003	CONFERENCE ROOM	29-Mar-07 🔲	
Cou	nt per Status	2				
100	In Service					
100002	16" Monitor - Sony		1001	OFFICE 1001	30-Mar-07 🔲	
100003	16" Monitor - Sony		1002	OFFICE 1002	30-Mar-07 🔲	
Cou	nt per Status	2				
200	Out of Service					
100001	17" LCD Monitor		1003	CONFERENCE ROOM	30-Mar-07 🔲	
Cou	nt per Status	1				
SCRAP						
100001	17" LCD Monitor		SCRAP		29-Mar-07 🔲	
100001	17" LCD Monitor		SCRAP		29-Mar-07 🔲	
100001	17" LCD Monitor		SCRAP		29-Mar-07 🔲	
Cou	nt per Status	3				
Tota	I Count	8				

Track'Em - Asset History by Category							
	Asset		Location		Date From Scanner	User	
Category	PC MONITOR						
100001	17" LCD Monitor		1003	CONFERENCE ROOM	30-Mar-07 🔲		
Count	per Category	1					
	Total Count	1					
	i utai count	1	Г'				

Figure 48c

Note: The MODEL NUMBER field in the Asset table and the PRODUCT NUMBER field in the Product table must match in order to run the Asset History by Model Number report.

## Kit / Assembly Menu

Track'Em allows you to track the movement of kits (assemblies) and their associated components. The kit must first be assigned a parent number. This parent number can be either an asset or inventory. Kits are considered an ASSET if they have unique numbers, such as serial numbered office equipment, tools, or legal documents. Kits are considered INVENTORY if 2 kits have the same number, such as two boxes of copier paper.

Kit / Assembly Menu							
THIS IS MY COMPANY							
Track'Em™ - Version 3.18 - Copyright by RVB Systems Group - All Rights Reserved							
Create Kit / Assembly	Kit Component Report (Parts)						
Set Kit / Component	Kit Component Report						
Relationships	(Assets)						
Kit / Component Datasheet							
	Main Menu						
Figu	re 49a						

The components of a kit must also be assigned part numbers according to the following rules:

Kit's parent number = ASSET	Kit's parent number = INVENTORY
Component can be ASSET or INVENTORY.	Component must be INVENTORY.

To create a kit in Track'Em, you need to first enter the parent information using the INVENTORY DATA ENTRY or ASSET DATA ENTRY menus. You also need to enter component information using the same menus. After this information has been added, you should use the KIT / COMPONENT RELATIONSHIP screen to assign components and associated quantities to parent kit records.

🛛 Kit / Component Relationships 💦 🔀
Control Contro
Define Component © Inventory - Identical items have same barcode
Component v Barcode
Number of Component 1 Barcodes per Kit or Assembly (One if Component = Asset) Update Database

Figure 49b

Once relationships are established, components will be moved or deleted along with the master kit / assembly part number as described in the table below.

The following table shows how kits and their components are affected when a kit is created or moved. NOTE: if a kit is classified as an Asset, then its parent record must be created the same as any other asset. Moving or scrapping an Asset Kit is the only method of automatically modifying its associated component records.

Action	Kit parent record is ASSET	Component record (Asset)	Component record (Inventory)
Move	<ul> <li>Assigns new location to</li></ul>	<ul> <li>Assigns new location to</li></ul>	<ul> <li>Do the following IF new location's value for "Delete Components from inventory when Asset type Kit or Assembly moved to this location?" is TRUE.</li> <li>Consume (delete) kit inventory components.</li> <li>Write history records for inventory components.</li> </ul>
Asset	the kit master record. <li>Write history record for</li>	asset component records. <li>Write history records for</li>	
Kit	kit master record	asset components	

Action	Kit parent record is INVENTORY	Component record (Asset)	Component record (Inventory)
Create Inventory Kit	<ul> <li>Add / update kit master inventory record.</li> <li>Write history records for kit master record</li> </ul>	N/A	<ul> <li>Consume (delete) kit inventory components.</li> <li>Write history records for inventory components.</li> </ul>
Move Inventory Kit	<ul> <li>Move kit master record just like any other inventory movement.</li> <li>Write history record for kit master record</li> </ul>	N/A	Kit component records are NOT moved when kit master record is moved.

Table 2

Track'Em	- Create	Kit Screen		×
Select PRODUCT from List	Parent	Product Number	Short Description	¥
To Inventory Location Barcode Quantity Created	[ [	Work Order	×	
Note: You must assign KJ additional information req			ITS. Consult the User's Manual for	
		Update		

Figure 49c

Reports are available that show existing kit / component relationships.

Track'Em - Kit / Component Report Kit = Part						
Kit Barcode Number	Kit Description	Component Barcode Number	Component Qty			
1	SPROCKET					
		100002	1			
240	KIT TEST					
		240A	1			
		240B	3			

Figure 49d

You can add, edit or delete records using the datasheet form (Figure 49e). To add a record, merely start typing on the new line (indicated by an ASTERICK at the start of the line). After entering data for each field, pressing the ENTER key will add a new record.

To delete a record, select that record and press your DELETE key or click the DELETE menu bar button. Keep in mind that you can select which columns to display using the HIDE THIS FIELD ON DATASHEETS AND FORMS option found on the CUSTOMIZE FIELD CAPTIONS option in the Advanced System Admin Menu. This feature is discussed in the System Admin section of this manual.

	Parent	Child	QtyChildPerParent	ParentAsset	ChildAsset
٠	1	123	10		
	100001	100002	1	<b>~</b>	<ul> <li>Image: A start of the start of</li></ul>
*			1		
			<b>F</b> i 10		

Figure 49e

## Check In / Check Out Menu

The Track'Em Check In / Check Out module (Figure 50a) allows you to check out assets (such as books, documents, tools, tapes, etc) to physical location or a virtual location (such as an individual or project). Check out periods can be assigned to individual assets (such as a specific book), to an entire category of assets (such as non-fiction books) or system wide (all books).

When an asset is moved to a location that has a "Location considered "Checked Out?" value of TRUE, a due date is assigned to that asset based upon the check out date, the check out period, the Holiday table values, the weekend setting and the grace day setting. The weekend setting and grace day setting are specified on the DUE DATE CALCULATION SETUP form.

Track'Em will look for a CHECK OUT PERIOD value in the following order: ASSET RECORD, CATEGORY RECORD, SETUP TABLE (system default check out period value) and use the 1st value found.

Check In / Check Out Menu	
THIS IS MY	COMPANY
Track'Em™ - Version 3.18 - Copyright by	RVB Systems Group - All Rights Reserved
Check In / Check Out Form	
	Currently Checked Out Reports
Due Date / Days Out Setup	Last Time Checked Out / Times Checked Out Reports
Add / Edit Holidays	Checked In Overdue Reports
- Days Out / Cost Current	
Status Reports	
Days Out / Cost History Reports	Main Menu
Figure	e 50a

A specific form (Figure 50b) is provided for Check In / Check Out functions, but any of the Asset movements forms may be used to check in / out assets.

🗷 Track'Em	- Check In / Check Out	×
Asset Barcode	×	
Note: Th	e values inside this box cannot be changed from this screen.	
Check Out Pe	riod (Days) Due Date	
Last Checked	Out: Times Checked Out	
	Asset is CHECKED	
Asset Location	×	
Barcode		
Asset Status (Optional	×	
Èntry)		
	Update	
	Figure 50b	

Seleo Categ			~
Selec Locat			*
	Over Due Assets by Selected Category	Over Due Assets by Every Category	
	Over Due Assets by Selected Location	Over Due Assets by Every Location	

Figure 50c

Barcode	Description	Category Status Code and De		te Last æd Out	Due Date
Location	301 MS JONES 1ST GRAE	E CLASSROO			
20003	WRITING FOR BEGINNER	FICTION BOOKS	7	/14/2007	8/1/2007
20004	LASSIE COME HOME	FICTION BOOKS	7	/14/2007	8/1/2007
20005	MY FRIEND'S HOUSE P.A	FICTION BOOKS	7	/14/2007	8/1/2007
20007	INDIAN SUMMER	FICTION BOOKS	7	/14/2007	8/6/2007
20008	RED PONY	FICTION BOOKS	7	/14/2007	8/6/2007
			Total Over Due by Location	<b>n</b> 5	
			Total Over Due	5	



Locations can be a physical location (MS JONES  $1^{ST}$  GRADE CLASSROOM), a virtual location such as a project or they can be a person (JOHNNY JONES –  $2^{ND}$  GRADE).

🔎 Tra	ck'Em -	Checked O	ut by (	Category, Location	
Selec Categ Categ Ched SORT	gory	1 2 3 4 5	COMPUTER EQUIP A TOOLS OFFICE SUPPLIES FICTON BOOKS NON-FICTION BOOKS		
Select Location Checked = SORT BY CODE		301	TRUCK	301	
Checked Out Assets by Selected Category(s)				Checked Out Assets by Every Category	
		Out Assets by d Location(s)		Checked Out Assets by Every Location	
		Fi	gure 50e		

Barcode	Description		on Code and Description Code and Description	_	ate Last cked Out	Due Date
Category	FICTION BOOKS					
20009	MY FUN DAY	301	MS JONES 1ST GRADE C	LASSROO	8/30/2007	9/13/2007
			Total check	ked out by ca	tegory	1
				Total checke	dout	1

Figure 50f

Track'Em - Checked Out by Location Report						
Barcode	Description	Category Status Code and 1	Description	Date Last Checked Out	Due Date	
Location	301 MS JONES 1ST G	RADE CLASSROO				
20002	READING IS FUN			8/30/2007	9/13/2007	
20009	MY FUN DAY	FICTION BOOKS		8/30/2007	9/13/2007	
			Total Checked Out	by Location	2	
			Total Checked Out	2	2	

Figure 50g

🔎 Tra	ck'Em - Tir	nes Che	ecked (	Out by Category,	Loca 🗙
	Select Category(s) 1 Checked = SORT CATEGORY BY CODE 4 5		A T OF FIC	MPUTER EQUIP FOOLS FICE SUPPLIES TON BOOKS N-FICTION BOOKS	
Select Location(s) Checked = SORT LOCATION BY CODE		301	TR	UCK 301	
	Note: only	locations wit	h CHECKED	OUT = TRUE are available	
	By Selec Categor			By Every Category	,
	By Selec Location			By Every Location	

Figure 50h

Barcode	Description	Description Location Code and Description Status Code and Description		Date Checke	e Last ed Out - C	Times hecked Ou
Category	FICTION BOOKS					
20003	WRITING FOR BEGINNER	301	MS JONES 1ST GRADE (	CLASSROO	7/14/2007	1
20004	LASSIE COME HOME	301	MS JONES 1ST GRADE (	CLASSROO	7/14/2007	1
20005	MY FRIEND'S HOUSE PA	301	MS JONES 1ST GRADE (	CLASSROO	7/14/2007	1
20007	INDIAN SUMMER	301	MS JONES 1ST GRADE (	CLASSROO	7/14/2007	1
20008	RED PONY	301	MS JONES 1ST GRADE (	CLASSROO	7/14/2007	1
20009	MY FUN DAY	301	MS JONES 1ST GRADE (	CLASSROO	8/30/2007	1
Category	NON-FICTION BOOKS					
20001	LEARNING YOUR ABC'S	302	JOHNNY JONES - 2ND G	RADE	8/30/2007	1
20002	READING IS FUN	301	MS JONES 1ST GRADE (	LASSROO	8/30/2007	2

Figure 50i

A Track'Em - Asset	s Checked In Past	Due Date		23
Select Asset         1         16" SONY MONITOR           Image: Checked = SORT         1000         TEST ASSET - NO CAT           BY BARCODE         100002         16" SONY MONITOR           1001         TEST - NO CAT/DEPT		- NO CAT DNITOR		
Select FROM Location	CR	COMPUTER	ROOM	
Selected Assets by Selected Location All Assets by Selected Location			Selected Assets by Every Location	
Select Date Range for Report (Date record created)  START DATE  ND DATE  ND DATE				

Figure 50j



Figure 50k

## Due Date / Days Out Setup and Holiday Table

You have the option of excluding weekend days and holidays when calculating the DUE DATE and the DAYS OUT values. You can also set Track'Em to not started calculating the due date until the first day after an asset is checked out.

The HOLIDAYS table contains a list of dates that should be excluded when calculating DAYS OUT. If you do not want to exclude a specific holiday, merely delete if from the table. You can add holidays as required.

The DAYS OUT value is calculated on several reports which use either the current Asset table or the Asset history table. This value is the number of days between a start date and an end date, optionally excluding holidays, weekends, and a grace day.

Track'Em uses both data and time to determine when an asset is due back. A book with a 1 day check out period checked out on Monday at 3 PM is due back on Tuesday at 3 PM. The MINUTES GRACE value (entered in SETUP FORM – Fig 59) of 30 minutes would allow the same book to be checked in on Tuesday 3:30 PM without being overdue.

 tblHolidays
Date of Holiday 🚽
1/1/2011
5/26/2011
7/4/2011
9/1/2011
11/27/2011
11/28/2011
12/24/2011
12/25/2011
12/26/2011
1/1/2012
Figure 501



#### Days Out / Cost Current Status Reports

The Days Out / Cost current status report allows you to see how many days an asset or a group of assets have been assigned to a specific location. The location selected may have either a checked in or checked out status. Only locations currently assigned to existing assets are available.

■ Track'Em - As	set Reports by Location	×
Select Location	Assets by Selected Location	
	Figure 501	

Track'Em - Assets by Location Selected Report - Days Out					
Barcode		Date Last Updated	Days Out	Daily Rate	Cost
Location 1003	CONFERENCE ROOM				
100001	17 LCD Monitor	05-Feb-08	154	\$1.00	\$154.00
	Total Assets	1	7	otal Costs	\$154.00

#### Figure 50m

## Days Out / Cost History Reports

The Days Out / Cost history report allows you to see how many days an asset or a group of assets were assigned to a specific location. The location selected may have either a checked in or checked out status. Only records with the selected FROM LOCATIONS in the Asset History table are available.





Track'Em - Asset History by Location Report - Days Out									
Asset			Start / En	d Date	Days Out	Daily Rate	Cost	From Scanner	User
Location	201	LIBRARY							
1	LASER P	RINTER	05-Jun-08	10-Jun-08	5	\$25.50	\$127.50		NOT USED
	Total Cou	unt	1	Tota	al Cost		\$127.50	-	

Figure 50o

#### Send Portable Barcode Scanner Data to PC

This is the screen that is used to send data from the portable barcode scanner to the database. Additional details regarding this option are located in the section of the manual titled TRACK'EM PORTABLE SCANNER.



## Import / Export Selected Data

You can import and export selected data using the Import / Export Selected Data option. You can import or export whatever fields you require for any of the tables shown in the TABLES list box. Note: You can export data from any table or report using the EXPORT option on the menu bar as described in the section titled Track'Em PC System.

🛛 🗖 Data Import / Export Form					
Setup Import	: Data Format	Setu	p Export Data Format		
Tables	Assets Categories Current Inventory Locations Product Master		File Format © Comma Delimited Text File © Excel Spreadsheet		
Available Fields			Selected Fields		
Barcode - Barcode AssetDescription - Asset Description AssetDescriptionLong - Asset Description Long Make - Make Model - Model Desc ModelNumber - Model Num SerialNumber - Serial			d Item > Barcode AssetDescription		
Import Selected Data - Append	Import Selecte Replace				
	Figure	51b			

To import or export data, first select the desired table name (see Table 3a). Next, move fields from the AVAILABLE FIELDS box to the SELECTED FIELDS box. The fields selected will be imported or exported in the same order they are listed in the SELECTED FIELDS box.

Table Description	Actual Table Name	
Assets	tblAssets	
Asset History	tblAssetHistory	
Categories	tblCategory	
Current Inventory	tblInventory	
Cycle Count History	tblInventoryCycleHistory	
Department	tblDept	
Inventory History	tblInventoryHistory	
Locations	tblLocations	
Product Master	tblProducts	
Status Codes	tblStatus	
Asset History	tblAssetHistory	
Vendors	tblVendors	

In order to import data (Figure 51b), it must be stored as a comma-delimited text file (normally has a filename extension of .TXT or .CSV) OR an Excel spreadsheet. You will be prompted for the import or export file name. You can append new data to the existing data in a table, or you can replace the existing data with the imported data. If you select REPLACE, all existing data will first be erased before the new data is imported.

WARNING: You should make a backup of the Track'Em database (TrackEm3.mdb) prior to IMPORTING DATA

#### Note: Text fields cannot contain double quote marks (").

If you select Append, you will encounter an error message (Figure 51c) if Track'Em attempts to add duplicate data keys. The key fields are defined in Tables 3b - 10 below.

Track'En						
	Track'Em was unable to append all the data to the table.					
(į)	The contents of fields in 0 record(s) were deleted, and 5 record(s) were lost due to key violations. * If data was deleted, the data you pasted or imported doesn't match the field data types or the FieldSize property in the destination table. * If records were lost, either the records you pasted contain primary key values that already exist in the destination table, or they violate referential integrity rules for a relationship defined between tables. Do you want to proceed anyway?					
	Yes Help					
	Figure 51c					

## IMPORTANT NOTE: DO NOT INCLUDE A HEADER LINE IN YOUR IMPORT DATA FILE.

Occasionally, errors occur when importing data to Track'Em. These errors will be written to a new table with the following format: "[import filename]\_ImportErrors". You should review any error file and take whatever steps necessary to correct the problem.

NOTE: When importing from Excel spreadsheets containing multiple SHEETS, only the first sheet is available to be imported using the tools provided with Track'Em . If you need to import data from the  $2^{nd}$  or subsequent sheets in a multi-sheet spreadsheet, these sheets must first be saved to a single sheet spreadsheet.

#### Data Table Definitions Assets - BARCODE IS KEY FIELD (NO DUPLICATES), LOCATION REQUIRED

Field	Field Name	Required in	Field Type & Size
Field Number	r iciu manite	Data File	riciu rype & size
1	Barcode (KEY)	YES	<b>TEXT - 20</b>
2	AssetDescription	NO	TEXT - 20 TEXT - 20
3	AssetDescriptionLong	NO	TEXT - 255
4	· · ·		
4	Location	YES	<b>TEXT - 20</b>
	(Note: This is a code)	NO	TEXT 50
<u>5</u> 6	Make Model	NO	TEXT - 50
7	ModelNumber	NO NO	TEXT - 50 TEXT - 50
/	(Note: Model number should	NO	1EA1 - 30
	be added to PRODUCTS table in		
	order to run Assets by Model		
	reports)		
8	SerialNumber	NO	TEXT - 50
9	DateAcquired	NO	DATE (MM/DD/YY)
10	PurchasePrice	NO	CURRENCY
11	DepreciationMethod	NO	TEXT - 50
12	DepreciableLife	NO	INTEGER
13	SalvageValue	NO	CURRENCY
14	CurrentValue	NO	CURRENCY
15	Comments	NO	MEMO
16	NextSchedMaint	NO	DATE (MM/DD/YY)
17	AdditionalInfo1	NO	TEXT - 255
18	AdditionalInfo2	NO	TEXT - 255
19	AdditionalInfo3	NO	TEXT - 255
20	AdditionalInfo4	NO	TEXT - 255
21	AdditionalInfo5	NO	TEXT - 255
22	LabelName	NO	TEXT - 255
23	StatusCode	NO	TEXT - 20
	(Note: This is a code)		
24	DepartmentNumber	NO	TEXT - 20
25	(Note: This is a code)	NO	INTECED
25	UserNumberField1 UserNumberField2	NO NO	INTEGER DOUBLE
27	UserNumberField3	NO	DOUBLE
28	UserDefinedDate	NO	DOUBLE DATE / TIME
30	UserDefinedCurrency	NO	CURRENCY
50	Note: used for Daily Cost	110	CONNENCT
31	UserDefinedBoolean	NO	BOOLEAN (True / False)
32	PictureFileName	NO	TEXT - 255
33	Scraped	NO	BOOLEAN (True / False)
34	Category	NO	TEXT - 10
	(Note: This is a code)		
35	CheckOutPeriod	NO	INTEGER
36	CheckOutDate	NO	DATE (MM/DD/YY)
37	CheckOutStatus	NO	BOOLEAN (True / False)
38	DueDate	NO	DATE (MM/DD/YY)
39	TimesCheckedOut	NO	INTEGER
40	LastUpdated	NO	DATE / TIME
41	Scanned	NO	BOOLEAN (True / False)
42	VendorCode	NO	TEXT - 10
	(Note: This is a code)		
43	PreviousLocation	NO	TEXT - 20
	(Note: This is a code)		

Table 3b Note: Boolean data is represented in a comma delimited text file by 1 or 0, where 0 is NOT CHECKED (FALSE)

Field Number	Field Name	Required in Data File	Field Type & Size
1	LocationNumber (KEY)	YES	<b>TEXT – 20</b>
2	LocationDesc	NO	TEXT - 50
3	ConsumeLocation	NO	BOOLEAN (T / F)
4	InitialLocation	NO	BOOLEAN (T / F)
5	ConsumeComponent	NO	BOOLEAN (T / F)
6	IsOut	NO	BOOLEAN (T / F)

 Table 4

 Note: Boolean data is represented in a comma delimited text file by 1 or 0, where 0 is NOT CHECKED (FALSE)

## Products – 1<sup>st</sup> FIELD IS KEY FIELD (NO DUPLICATES) - 2<sup>ND</sup> FIELD IS REQUIRED

Field	Field Name	Required in	Field Type & Size
Number		Data File	
1	Barcode (KEY)	YES	TEXT - 20
2	ProductNumber	YES	<b>TEXT – 50</b>
			(Note – this field can be duplicated)
3	ProductDescShort	NO	TEXT – 20
4	ProductDescLong	NO	TEXT – 255
5	UOM	NO	TEXT - 20
6	Reorder	NO	INTEGER
7	LastOrdered	NO	DATE (MM/DD/YY)
8	LastPrice	NO	CURRENCY
9	AdditionalInfo1	NO	TEXT – 255
10	AdditionalInfo2	NO	TEXT – 255
11	AdditionalInfo3	NO	TEXT - 255
12	AdditionalInfo4	NO	TEXT - 255
13	AdditionalInfo5	NO	TEXT - 255
14	LabelName	NO	TEXT - 255
15	DepartmentNumber	NO	TEXT - 20
	(Note: this is a Code)		
16	UserNumber1	NO	LONG INTEGER
17	UserNumber2	NO	DOUBLE
18	UserNumber3	NO	DOUBLE
19	UserCurrency1	NO	CURRENCY
20	UserCurrency2	NO	CURRENCY
21	UserDate1	NO	DATE / TIME
22	UserDate2	NO	DATE / TIME
23	UserBoolean1	NO	BOOLEAN
24	UserBoolean2	NO	BOOLEAN
25	PictureFileName	NO	TEXT – 255
26	Category	NO	TEXT - 10
	(Note: this is a Code)		
27	Vendor1	NO	TEXT - 10
	(Note: this is a Code)		
28	Vendor2	NO	TEXT - 10
	(Note: this is a Code)		

Table 5

Note: Boolean data is represented in a comma delimited text file by 1 or 0, where 0 is NOT CHECKED (FALSE)

## Status Codes – 1<sup>ST</sup> FIELD IS KEY FIELD (NO DUPLICATES)

Field Number	Field Name	Required in Data File	Field Type & Size
1	StatusCode (KEY)	YES	TEXT – 16
2	StatusDesc	NO	TEXT - 200

Table 6

## Category Codes – 1<sup>ST</sup> FIELD IS KEY FIELD (NO DUPLICATES)

Field Number	Field Name	Required in Data File	Field Type & Size
1	CategoryID (KEY)	YES	TEXT – 10
2	Category	No	TEXT - 40

Table 7

## Current Inventory – 1<sup>st</sup> FIELD IS KEY FIELD (DUPLICATES OK) - 2<sup>ND</sup> FIELD IS REQUIRED

Field Number	Field Name	Required in Data File	Field Type & Size
1	Barcode (KEY)	YES	<b>TEXT – 20</b>
			(Note – this field can be duplicated)
2	Location	YES	TEXT – 20
	(Note: this is a code)		(Note – this field can be duplicated)
3	Qty	NO	LONG INTEGER
		(Default = 0)	
4	DateLastUpdated	NO	DATE

Table 8

## Vendor Codes – 1<sup>ST</sup> FIELD IS KEY FIELD (NO DUPLICATES)

Field Field Name Number		Required in Data File	Field Type & Size
1	VendorCode (KEY)	YES	<b>TEXT – 10</b>
2	VendorDesc	YES	<b>TEXT – 100</b>
3	VendorContact	NO	TEXT - 255
4	VendorPhone	NO	TEXT - 20
5	VendorAdd1	NO	TEXT – 255
6	VendorAdd2	NO	TEXT – 255
7	VendorAdd3	NO	TEXT – 255
8	VendorAdd4	NO	TEXT – 255
9	VendorAdd5	NO	TEXT – 255
10	VendorEmail	NO	TEXT – 255
11	VendorFax	NO	TEXT - 20
12	VendorCell	NO	TEXT - 20
13	VendorOther1	NO	TEXT – 255
14	VendorOther2	NO	TEXT – 255
15	VendorNotes	NO	TEXT – 255

Table 9

## Department Codes – 1<sup>ST</sup> FIELD IS KEY FIELD (NO DUPLICATES)

Field Number	Field Name	Required in Data File	Field Type & Size
1	DeptID (KEY)	YES	TEXT – 20
2	DeptDesc	NO	TEXT – 255

Table 10

## System Admin Menu

Access to the System Admin menu (Figure 52) is by default set to SYSTEM ADMIN security level. The passwords provided with Track'Em are as follows:

Security level	User name	Password	Scanner User ID	
USER	USER	USER	1	
ADMINISTRATOR	ADMIN	ADMIN	999	

Any user can view the System Admin menu if the REQUIRE PASSWORD ENTRY AT STARTUP (PC) is set to FALSE. This is the default setting. See the System Setup section of the Advanced System Admin Menu for additional information.

System Admin Menu					
My Company Name Here					
Track'Em™ - Version 3.13 - Copyright by R	RVB Systems Group - All Rights Reserved				
Add / Edit Users and Passwords	System Setup				
Add / Edit Locations - Simple	Add / Edit Vendors - Simple				
Add / Edit Locations - Datasheet	Add / Edit Vendors - Datasheet				
Add / Edit Status Codes - Simple	Add / Edit Departments - Simple				
Add / Edit Status Codes - Datasheet	Add / Edit Departments - Datasheet				
Add / Edit Categories - Simple					
Add / Edit Categories - Datasheet					
Advanced System Admin Menu	Main Menu				

Figure 52

#### Add / Edit Users and Passwords

You can add or edit passwords using the ADD / EDIT USERS AND PASSWORDS option (Figure 54a and b). For new accounts, merely type a user name and password. Confirm the password and set the Admin Level. Checking the ADMIN LEVEL box allows the account to access secure menu options. Passwords are hidden from view. If a USER level account attempts to open an ADMIN level option, the following message will appear.



To edit an existing account, select it from the dropdown list and make changes. No changes will be saved until UPDATE CHANGES is clicked.

<b>ℤTrack'Em - Use</b>	rForm 🔀	Track'Em - User	Form	×
User Name:		User Name:	admin 💌	
User ID Number:	admin user	User ID Number:	999	
User Password:		User Password:	****	
Confirm Password		Confirm Password		
Admin Level	<b>·</b>	Admin Level 🛛 🗖	2	
	Update Changes		Jpdate hanges	

Figure 54a and b

The USER NAME and USER PASSWORD fields must be entered if REQUIRE PASSWORD ENTRY AT STARTUP (PC) is enabled (System Setup – Figure 58a).

The USER ID NUMBER must be entered on the portable scanner if REQUIRE USER ID ON PORTABLE SCANNER is enabled (System Setup – Figure 58a). The USER ID NUMBER for the 'user' account provided with Track'Em is 1.

#### Locations / Statuses / Categories / Vendors

Track'Em location data is entered from the System Admin menu. Products and Assets use the same location table. Locations can be physical (warehouse rack number 10B13, office number 100, etc) or virtual (project number 3A, employee number 2002, customer number 1002, etc).

When entering Product locations, you need to specify if a location consumes inventory. In other words, when a product is moved to this location, it is deleted from inventory (i.e. removed from existing inventory location and NOT added to another inventory location).

If you are using Bartender Automation Edition to label inventory upon receipt and you would like to automatically update the database with the number of labels printed, then one location's INITIAL LOCATION value should be set to YES (TRUE).

P	Locations	
►	Location Code 🚺	
	Description WAREHOUSE 1	
	Location Note: Moving products to a CONSUMING Uses LOCATION will delete item from inventory. Inventory?	
	Initial Location?	
Delete Component		
	Location considered C •Checked Out?•	
	Note: Moving an ASSET to a location that is considered "CHECKED OUT" will check the asset out. Track'Em will look for a CHECK OUT PERIOD value in the following order: ASSET RECORD, CATEGORY RECORD, SETUP TABLE and use the 1st value found.	
Re	ecord: 📢 🔍 🕺 1 🕨 🕨 🗮 of 13	

Figure 55a

If the Location is considered "Checked Out", then the Checked Out box should be checked. Track'Em determines an asset's Check Out Period by looking in the ASSET table, then the CATEGORY table, then the SETUP table and using the first value found.

tblLocation : Table						
	Location Code	Description	Location Uses Inventory?	Initial Location?	Delete Component	Location considered "Checked Out
۵	1000	OFFICE 1000				
	1001	OFFICE 1001				
	1002	OFFICE 1002				
	1003	CONFERENCE ROOM				
	123	TOP SHELF - WAREHOUSE			<b>V</b>	
	201	LIBRARY				
	301	MS JONES 1ST GRADE CLASSF				
	302	JOHNNY JONES - 2ND GRADE				
	456	BOTTOM SHELF - WAREHOUSE				
	789	COPY MACHINE	<b>&gt;</b>			

Figure 55b

See the section on KIT / COMPONENT RELATIONSHIPS for more information on the DELETE COMPONENT field in the Location table.

Status data for Assets is entered from the System Admin menu. Keep in mind that status information is optional. If you do not want to record status information, leave it blank on the PC form or merely press the ENTER key on the portable scanner at the status prompt. Status data can be a code, a descriptive word, a person's name, or anything else.

Þ	Sta	tu	s Co	des		×
▶	Stat	us		100		
	Stat Des		tion	In Servic	;e	_
Re	cord: (	K		1 🕨	▶ ▶ ★ of 2	
					Figure 56a	
			S	tatus	Status Description	
		►	1		NEEDS REPAIR	
			100		IN SERVICE	
			200		OUT OF SERVICE	
			555		PROJECT ABC	
			998		QA HOLD	
			999		QA REJECTED	
		*				
					Figure 56b	

The Category table is used by both Assets and Inventory. It is an optional but recommended field in both tables. Examples of categories for a library might be FICTION BOOKS, NON-FICTION BOOKS, REFERENCE MATERIALS, etc. Examples of categories for computer equipment might be MONITORS, PRINTERS, etc.

P	Categories	; <u> </u>				
•	Category ID Category Name	1  PFFICE SUPPLIES				
	Check out period in DAYS	5				
	value in the following	a CHECK OUT PERIOD order: ASSET RECORD, ), SETUP TABLE and use				
Re	Record:					
	Figure 57a					

	Category ID	Category Name	Check Out Period in Days
►	1	OFFICE SUPPLIES	5
	2	PC CABLEs	
	3	MISC HARDWARE	
	4	PC MONITOR	
	5	PRINTER	
	6	NON-FICTION BOOKS	14
	7	FICTION BOOKS	14
	8	REFERENCE BOOKS	7
		Figure 57b	

The Vendor table is used by both Assets and Inventory. It is an optional field in both tables. The use of this field will allow you to run inventory re-order reports by specific vendors.

2	Vendors	_ 🗆 ×
\$	Vendor Code	101
	Supplier	JC PENNY
	Contact	JIMMY JONES
	Phone	212-555-1212
	Address Line 1	101 OAK DRIVE
	Address Line 2	YOURTOWN, XX 99999
	Address Line 3	
	Address Line 4	
	Address Line 5	
	E-mail	email@url.com
	Fax	
	Cell	
	Other Info 1	
	Other Info 2	
	Notes	TRACK'EM IS PRICED AT \$895
Re	cord: M 🔸 1 of 3 🕨 M 👫	No Filter Search

Figure 58a

The Department table is used by both Assets and Inventory. It is an optional field in both tables. The use of this field will allow you to run reports by specific departments.

12	Departmen	ts 🗕	. 1	x
•	Department Number	ji A		
	Department Description	SHIPPING		
		Figure 58b		

## System Setup

The System Setup screen allows you to set system wide features such as password protection, how to handle barcodes entered on the portable scanner which are not already in the database, and date / time display on reports.

Any user can view any option (even options that have been set to PASSWORD SECURITY FOR THIS MENU OPTION – see Figure 65 in the Advanced System Admin Menu Section) if the REQUIRE PASSWORD ENTRY AT STARTUP (PC) is set to FALSE.

You can add new asset, product, location, and status code records to the Track'Em database tables using the portable scanner if you check the appropriate checkbox(s). Otherwise, data that does not exist already in the database will be ignored when the portable scanner data is downloaded.



The option reading "KEEP INVENTORY RECORDS WHEN THEY REACH ZERO ON-HAND" allows you to select if the current inventory record for a specific part / location combination should be deleted or not whenever the on-hand quantity is equal to or less than zero. If this is not checked, then inventory records with quantities at or below zero due to material movements will be deleted.

The option reading "ALLOW NEGATIVE INVENTORY" should be checked if you are using multiple portable barcode scanners and you need to deplete inventory prior to downloading scanner data. (Example: Receiving uses scanner 1 to receive 5 widgets which are not in stock and moves them to the warehouse. Production staff uses scanner 2 to move 3 widgets into production and downloads the scanner data. The inventory table will show an on-hand inventory of -3 widgets prior to the receiving scanner's data being sent to the PC if this option is checked. The on-hand quantity will show 2 after the receiving scanner's data is transferred to the PC.

The MINUTES GRACE value is used by the CHECK IN / CHECK OUT module. Track'Em uses both data and time to determine when an asset is due back. A book with a 1 day check out period checked out on Monday at 3 PM is due back on Tuesday at 3 PM. The MINUTES GRACE value of 30 minutes would allow the same book to be checked in on Tuesday 3:30 PM without being overdue.

The warning message in Figure 60 appears after closing the Admin system Setup screen.



## Advanced System Admin Menu

The Advanced System Admin Menu (Figure 61) allows you to customize the appearance and functionality of Track'Em. These options are described on the following pages.

Advanced System Admin Menu	
	y Name Here
Track'Em™ - Version 3.13 - Copyright by	RVB Systems Group - All Rights Reserved
<b></b> Customize Field Captions	Portable Barcode Scanner Setup Form
Customize Menu Titles / Report Titles	Send Data to Portable Barcode Scanner
Edit Menu Descriptions / Set Security / Set Font Size / Hide	Reload Portable Scanner with Track'Em Program
Erase Selected Table	Set Time on Portable Scanner
Delete Asset History File	Edit Min / Max Data Lengths for Scanner / PC
Delete Inventory History	
Delete Cycle Count History	
System Admin Menu	Main Menu
Figur	re 61



The CUSTOMIZE FIELD CAPTIONS option (Figures 62 and 63) allows you to enter your own field descriptions (captions) for any of the fields in Track'Em. These custom captions will appear in the datasheet views, advanced data edit forms, and some of the hard-coded reports provided with Track'Em. The caption box on the advanced forms as well as some reports may need to be manually re-sized in order to accommodate extra long custom captions.

If you do not want a field to be displayed in the datasheet view or advanced form for a specific table, click the HIDE THIS FIELD checkbox. Figure 63b illustrates a field that has been hidden.

After making any changes (including changes to HIDE THIS FIELD), click the RESET CAPTION FOR SELECTED FIELD button.

🛛 Track'Em - Edit Captions 🛛 🔀	Track'Em - Edit Captions
Track'Em       Asset listory       Fields       Barcode         Tables       Asset History       Table       AssetDescription         Cycle Court History       Table       AssetDescription         Inventory History       Inventory       Table       Make         Make       Model       Model       Model         Current       Asset Description       SerialNumber       Image: SerialNumber         Caption       Hide this field on DATASHEETS and FORMS         Reset Caption for       Selected Field	Track'Em       Asset History Categories Cycle Count History Inventory History Inventory History Inventory History       Fields       Barcode AssetDescription         Current Caption       Field NOT SELECTED>         New Caption       Field on DATASHEETS and FORMS         Reset Caption for Selected Field
Figure 62	Figure 63

## Customize Menu / Report Title and Menu Option Descriptions

The title bar that appears at the top of each Track'Em menu can be changed using the CUSTOMIZE MENU TITLE option shown in Figure 64a. Additionally, you can add a company specific line to each report in Track'Em using this screen.





The CUSTOMIZE MENU DESCRIPTION / SET SECURITY / SET FONT SIZE option is shown in Figure 65. You can make changes to the text that is displayed on the menu screens using this form. This is also the form that is used to assign ADMINISTRATOR LEVEL security to menus. The font size can be changed for individual menu options in order to increase readability. Note: You must click the button labeled "UPDATE SETTING FOR SELECTED MENU OPTION" to save changes for a menu.

Any user can view any option (even options that have been set to PASSWORD SECURITY FOR THIS MENU OPTION) if the REQUIRE PASSWORD ENTRY AT STARTUP is set to FALSE (Figure 58a).

You can hide menu options that are not required for your company by checking the HIDE SELECTED MENU OPTION checkbox.

🔛 Track'Em -	Edit Menu Optio	ns Form	_ 🗆 X
Menus Names	Track'Em - Main Menu Track'Em - System Adm Track'Em - Inventory Da Kit / Assembly Menu Track'Em - Inventory Re	ta Entry Menu ports Menu	
Menu Option Des Inventory Data Enti Inventory Reports Kit / Assembly Men Upload Portable Ba Import / Export Se System Admin Men Assets Data Entry I Assets Reports Mer	Menu u rcode Scanner Data lected Data u v Menu nu		vescriptions (Custom)
Set ADMIN LE this menu opt	VEL SECURITY for ion	menus suc	ed menu option. Some h as the SYSTEM ADMIN ot be hidden.
Edit Custom Mer	nu Option Description		
s	enu Description for se elect Font Size 11	lected menu option	Update setting for selected menu option
•••	ption 12 13 14 16		Reset menu options - use default descriptions and unhide all

## **Erase Tables**

Track'Em is delivered with dozens of sample records. You can erase these records using the ERASE SELECTED TABLE option shown in Figure 66a.

L L	U	
🛃 Track'Em - E	rase Data	X
Select Table to Erase	Assets Asset History Category Cycle Count History Department Inventory Inventory History Locations Label Log Products	[
	Erase Seleted Table	
	Figure 66a	

Track'Em 🔣
Are you SURE you want to ERASE the Label Log table?
<u>Y</u> es <u>N</u> o
Figure 66b

The following tables contain sample records:

- Assets
- Asset History
- Category
- Cycle Count History
- Departments
- Inventory
- Inventory History
- Locations
- Label Log
- Products
- Status Codes
- Parent Child Relationships (Kit / Components)
- Vendors

#### Delete History Records

Whenever an asset is moved or has its status changed, or a product is received, moved or consumed, or a cycle count record is recorded, a history record is stored in the database. These records are stored in the Asset History, Inventory History, or Cycle Count History tables. You can delete old history records using the Delete History options.

You can delete records older than 6 months, 12 months, or use the calendar to select the age of any group of records to delete. You should backup the database file (TrackEm3.mdb) prior to deleting any history records.

	A Track'Em - Delete Asset History
	Delete Asset History Options C Delete all records older than 6 months Delete all records older than 1 year Delete all records older than date selected using calendar Delete All History Records Older than: 11/5/2012
	Delete Asset History File Records
	Figure 67a
Т	rack'Em
	Are you sure you want to DELETE records from the ASSET HISTORY file



#### **Portable Scanner Options**

The section of the manual titled PORTABLE SCANNER includes all information regarding the use of the portable scanner supported by Track'Em.

#### Edit Min / Max Data Lengths for Scanner / PC

You have the ability to specify the minimum and maximum barcode lengths for the following fields as shown in Figure 67d:

- Asset barcodes
- Asset location barcodes
- Product barcodes
- Product "To" location barcodes
- Product "From" location barcodes

The default value for all minimum lengths is 1. The default value for all maximum lengths is 20. Once you modify any of the values in this table, you need to restart Track'Em in order for the PC data entry screens to use the new values. You also need to resend the MIN / MAX values to the portable scanner. Consult the portable scanner section of this manual for instructions on reloading min / max values to the portable scanner.

🛚 Min / Max Data Leng 📘	. 🗆 🗙
Asset Barcode Min Length	h
Asset Barcode Max Length	20
Asset Location Barcode Min Length	1
Asset Location Barcode Max Length	20
Product Barcode Min Length	1
Product Barcode Max Length	
Inventory "From Location" Barcode	1
Inventory "From Location" Barcode	20
Inventory "To Location" Barcode Min 「 Length	1
Inventory "To Location" Barcode Max   Length	20
Figure 67d	

Figure 67e shows the error message which will appear when a value is entered with a length which is less than the specified minimum or greater than the specified maximum. This example assumes a minimum data length for the product barcode >= 2.

Ad - Ad Da	Track'Em - Pro Product Number Product Barcode	duct Table - Simple 🗙	Jre
Track'	Em		×
8	The length of the produc length specified in Track	ct barcode is less than the user definable n "Em OK	ninimum
		Figure 67e	

When you scan or type enter information on the scanner that is less than or greater than the specified MIN / MAX values, the scanner will emit an error beep and require you to re-scan or re-type a valid data length.

## Custom Reports Menu

The Custom Reports Menu (Figure 68) is provided as a method of running up to 15 custom reports without having to create new menus. These reports are named "CustomReport1" through "CustomReport15" and can be modified only if you own a licensed version of Microsoft Access 2003 or above. Consult the section of this manual titled Customizing Track'Em for more information.

You can use the Customize Menu Descriptions (Advanced System Admin Menu) to change the menu name as it appears on the Custom Reports Menu.

Custom Reports Menu	
THIS IS MY	COMPANY
Track'Em™ - Version 3.18 - Copyright by	RVB Systems Group - All Rights Reserved
Custom Report 1 (Modify reports using MS Access)	Custom Report 9
Custom Report 2 (Change name via Sys Admin Menu)	Custom Report 10
Custom Report 3	Custom Report 11
Custom Report 4	Custom Report 12
Custom Report 5	Custom Report 13
Custom Report 6	Custom Report 14
Custom Report 7	Custom Report 15
Custom Report 8	Main Menu

Figure 68

## Track'Em Portable Scanner (PDT – Portable Data Terminal)

Track'Em provides support for the Unitech HT630D portable scanner (Figure 69). This portable scanner has the following features:

- Drop Test Multiple 1.2 meter drops to concrete
- Sealed against moisture and dust to IP54 standards
- Weight: 245g with battery
- Dimensions: 168mm (1) x 67mm (w) x 35mm (h)
- Temperature: Operation: 0° C to 50°C Storage: -20°C to 70°C
- Humidity: 5% to 95% RH non-condensing
- Batch Communications: USB cable
- Scanner: Laser
- Keyboard: 26 alphanumeric keys
- Main Battery: Lithium-Ion 10 hours of continual use 2.5 hours to recharge
- Display: 8 lines by 20 characters back-lit
- The following popular linear barcode symbologies

Codabar	EAN 9
Code 128	Interleaved 2 of 5
Code 39	Trioptic
Code 93	UPC Add-On
EAN 128	UPC-A
EAN 13	UPC-E

• Standard memory 512k – up to 4.5 MB memory available



Figure 69

## Connection - Sending Data to PC

Data is uploaded to your PC from the Unitech portable scanner using a USB conversion cable or the optional communications / charging cradle. Consult the section titled USB Driver for additional details regarding scanner communications. After data is collected, merely connect the portable scanner to your PC and select the "Upload PDT Data" option from the main menu (figure 70). The window shown in figure 70b will appear. A progress bar will be displayed at the bottom of the window.



Figure 71a – 71d illustrate possible error screens when sending data from the PDT to the PC.



Figure 71a is displayed in the event of a communications error. Press CANCEL and correct the problem.

Figure 71b is shown for any of the following reasons:

- Communications cable is disconnected OR portable scanner is not properly seated in cradle
- Incorrect COMM PORT selected (See USB Driver section)
- Incorrect file type selected (i.e. No data of the type selected was found on the on portable scanner)
- Portable scanner data directory (C:\TrackEm3Files\PDT\_Data) does not exist on the local PC
- The attributes of the Track'Em directory has been set for READ ONLY.
- The attributes of the file C:\\$jgp.sts have been set for READ ONLY.

Track'Em	Track'Em
Please specify location of PDT Communications Software using the System Admin Menu	Please specify location of PDT Batch File 1 using the System Ac
ОК	ОК
Figure 71c	Figure 71d

Figure 71c is shown if the PDT Communication Software is not located in the directory specified in Figure 83 (located in the Track'Em PDT Software section). The default is C:\Program Files\Unitech America Inc\PTComm Manager\ PtComm.exe

Figure 71d is shown if the PDT Batch File number (1 to 4) is not located in the directory specified in Figure 83 (located in the Track'Em portable scanner software section). The default locations are:

- C:\Track3EmFiles\ProductIn.trk
- C:\Track3EmFiles\ProductOut.trk
- C:\Track3EmFiles\Cycle.trk
- C:\Track3EmFiles\Assets.trk

#### These locations SHOULD NOT BE CHANGED, even if you are running Track'Em over a network.

Figure 71e will be displayed upon successful data transfer from scanner to PC.



#### **Battery Charging**

The NiMH battery supplied with the Unitech portable scanner can be recharged using the USB cable, an optional communications / charging cradle, or optional multi-slot (2 or 4 slot) battery re-chargers. Sophisticated power management automatically activates standby and shut-off modes to conserve battery life. See page 63 for details on how to reset the shut-off mode. A 30-minute low battery warning provides the user ample time to recharge the battery. The on-board battery backup provides power to the scanner if the main battery is completely drained or removed. Spare batteries are recommended and available from RVB Systems Group.

#### Turning On / Off the Portable Scanner

The portable scanner provided with Track'Em Standard has been setup to automatically start the Track'Em PDT software module whenever it is powered up. Press the RED button (second button from bottom, left hand side of keyboard) to power the unit on. The same button is used to turn off the scanner. Hold it down until the scanner powers off.

#### Portable Scanner System Menu

If for any reason you need to access the Portable Scanner System Menu, use the following steps as illustrated by the RED KEYS in Figure 72.

- 1. Power off PORTABLE SCANNER using the <PWR> (Power) key
- 2. PRESS and HOLD the <CMD> key and <LEFT ARROW> key at the same time.
- 3. PRESS <PWR> key.

Additional details regarding the PDT System Menu are available in the PDT User's Documentation.



The screen will display the following text:

<	<start menu="">&gt;</start>
1.	SUPERVISOR
2.	WARM START
3.	COLD START

#### WARNING!!!

# DO NOT SELECT COLD START. THIS WILL ERASE THE TRACK'EM SOFTWARE FROM THE PORTABLE SCANNER.

If you accidentally select COLD START and then answer YES to the ERASE ALL DATA? prompt, the Track'Em portable scanner software will be deleted from the PDT. You will need to reload the Track'Em PDT program again using the RELOAD PORTABLE SCANNER WITH TRACK'EM PROGRAM location on the ADVANCED SYSTEM ADMIN MENU,

The portable scanner will automatically turn itself off after a preset number of minutes of inactivity in order to help conserve the batteries. You can change the inactivity time-out value on the portable scanner. Here are the steps:

- 1. From Start Menu (shown above) select SUPERVISOR
- 2. Password = 630
- 3. Select 5 (PWR)
- 4. Use arrow key to change from the pre-set timeout value to any value you desire (including NO TIMEOUT)
- 5. Press ESC to get back to PWR menu then Supervisor Menu then COMMAND MODE

## Portable Scanner Keyboard

The portable scanner allows you to enter numeric (default) and alpha characters. In order to enter alpha characters, you must first press the ALPHA key. In ALPHA mode, the cursor is an underscore. In NUMERIC mode, the cursor is a block.

In alpha mode, every numeric key has 3 associated letters. Press the desired key until the desired letter is displayed.

#### For example:

First press [ALPHA] to switch the system to alpha mode (the cursor will be changed from block to underscore.

To enter 'A'	press [1] once
To enter 'B'	press [1] twice
To enter 'C'	press [1] three times

After entering letters, you must press the ALPHA key again to return to NUMERIC mode.

#### Setting Date / Time on Scanner

The portable scanner supported by Track'Em records the date and time that each record is collected. The date / time on the scanner provided with Track'Em Standard has been pre-set for Eastern Standard Time. You can use the Track'Em Advanced System Admin Menu to set the scanner to match your PC's current date / time. You can also modify the date / time for different time zones by following these steps.

- 1. Access the Portable Scanner System Menu as described on page 61.
- 2. Select SUPERVISOR and type 630 for the password and press <ENT>.
- **3.** Press the <ESC> key.
- 4. Press and hold the <CMD> key.
- **5.** Select 8 (SET).
- 6. Select 1 (DATE & TIME)
- 7. Enter the correct date / time using the arrow and number keys.
- **8.** Press the <ESC> key and then turn the scanner off and on again.

#### Change Scanner BEEPER Volume

- 1. Press the <CMD> key.
- 2. Press the *<*SP*>* key located directly above the *<*CMD*>* key.
- 3. Continue to press the <SP> key until desire BEEPER volume is selected (HIGH, MEDIUM, LOW, OFF)

## Track'Em Portable Scanner Software

The following section describes the Track'Em portable barcode software module that resides on the PORTABLE SCANNER (Figure 69) as well as basic operations of the portable barcode scanner. You will not have the ability to make changes to these screens unless you purchase the TRACK'EM DEVELOPER ADD-ON. For detailed technical information regarding operation of the portable scanner, consult the portable scanner user's manual that was provided with the Track'Em CD.

#### Portable Scanner Security Screen

You can select to use scanner security or not. If enabled, the user keys in their ID number (Figure 73a). ID numbers are assigned along with USERNAME and PASSWORDS as described in the System Admin section of this manual. When scanner security is enabled, all transactions will be tagged with the user's ID number. If you enter an invalid USER ID, the screen shown in Figure 73b will be displayed.



You	h	a١	/ e		e	n	t	e	r	e	d		a n
inv	a 1	i	_ I	u	5	e	r		Ι	D			
P 1 e	a s	e	t	r	y		a	g	a	i	n		
					0	R							
Con	s u	11	t	t	h	e		u	5	e	r	•	5
man	u a	1	t	0		t	u	r	n		0	f	<b>f</b>
sca	nn	eı	•	5	e	c	u	r	i	t	у	-	

Figure 73a and b

Main Menu Options

Т	r	a	С	k	•	Ε	m		S	y	5	t	e	m		3		1
1	-	R	Ε	C	Ε	Ι	۷	Ε		Ι	Т	Ε	М	S				
2	-	S	H	Ι	P		0	r		M	0	۷	Ε		Ι	Т	Ε	MS
3	-	C	Y	C	L	Ε		C	0	U	N	Т		Ι	Т	Ε	M	5
4	-	Т	R	A	C	ĸ		A	S	5	Ε	Т	S					
5	-	D	A	Т	A		Ε	D	Ι	Т		M	Ε	N	U			
6	-	D	A	Т	A		L	0	0	ĸ	U	P		M	Ε	N	U	
		Ε	N	Т	Ε	R		c	H	0	Ι	c	Ε	:				
i								Fi	gui	re 7	73c	;						

The Main Menu (Figure 73c) has 6 options. These are:

- 1. Receive Items (used to receive anything with non-unique numbers)
- 2. Ship or Move Items (used to ship / move anything with non-unique numbers)
- 3. Cycle Count Items
- 4. Track Assets (use to track anything with unique numbers)
- 5. Data Edit Menu
- 6. Data Lookup Menu

When in any of these menu choices, you can always press the F4 key to backup.

Note: Eight sample records (2 each for products, assets, locations, status codes) have been preloaded onto the portable scanner so you can view how the scanner displays descriptions. The barcode / lookup code values are "1" and "2" for each type of data.

#### **RECEIVE ITEMS** (anything with non-unique numbers)



Data entered from the RECEIVE ITEMS screens (Figure 74) will yield the following changes to the database:

- A record is added to INVENTORY table using the TO LOCATION if there is no inventory record with this barcode number / location combination. If an inventory record with this barcode number / location combination already exists, then the entered quantity is added to the existing quantity.
- If the PRODUCT does not exist in the database, the user can add its descriptions on the scanner and it will be added to the database (unless the ADD NEW PRODUCTS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- If the LOCATION does not exist in the database, it will be added to the database with a description of 'LOCATION ADDED BY PDT' (unless the ADD NEW LOCATIONS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- A new record is appended to INVENTORY HISTORY table. The FROM LOCATION is set to 'RECEIPT RECORD'.
- If you are using the RECEIVE function on the scanner to create kits, then kit component records will be depleted (consumed) and history records will be created for the component items.

As noted above, new products can be added (default) or optionally treated as invalid entries and not added. Note: Figure 59 illustrates how to specify whether to add new products or treat them as invalid entries. The user can enter descriptions on the portable scanner for new products.

After the data is transferred from the portable scanner to the PC (i.e. after the data is inserted into the appropriate database tables), a temporary file named

"C:\TrackEm3Files\PDT\_DATA\PRODUCTN.SAV" is stored on the PC in the event you need to use the data in another application. It contains multiple lines, each line containing a TO LOCATION #, BARCODE #, QUANTITY, USER ID (optional), PURCHASE ORDER (optional), NEW PRODUCT DESCRIPTION (only for new products), and DATE / TIME record was entered on the scanner.

This temporary file will be replaced with new data the next time receiving data is uploaded from the portable scanner.

NOTE: If a scanned barcode or typed data contains fewer characters that the specified MINIMUM or more than the specified MAXIMUM, the portable barcode scanner will emit an error tone and then require you to scan or type a different value. Consult the System Admin section of this manual for more information on setting MIN / MAX values.



#### SHIP or MOVE ITEMS (anything with non-unique numbers)

Data entered from the SHIP or MOVE screen (Figure 75) will yield the following changes to the database:

- If the TO LOCATION is NOT a CONSUME LOCATION, then a record is added to INVENTORY table using the TO LOCATION if there are no inventory records with this location. If an inventory record with this location already exists, then the entered quantity is added to the existing quantity.
- If the TO LOCATION is a CONSUME LOCATION, then no record is added to the INVENTORY table.
- Update the INVENTORY table record for the FROM LOCATION value. The quantity entered in the portable scanner is subtracted from the existing quantity to reflect the new quantity. If the new quantity is equal to or less than zero, the record will indicate zero (default). Negative quantities are not allowed. NOTE: You can optionally set Track'Em to not delete inventory records with zero quantity via the SYSTEM SETUP FORM.
- If the PRODUCT does not exist, the user can add their descriptions on the scanner and they are added to the database (unless the ADD NEW PRODUCTS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- If the LOCATION does not exist in the database, it will be added to the database with a description of 'LOCATION ADDED BY PDT' (unless the ADD NEW LOCATIONS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- A new record is appended to INVENTORY HISTORY table.

As noted above, new products can be added (default) or optionally treated as invalid entries and not added. Note: Figure 59 illustrates how to specify whether to add new products or treat them as invalid entries. The user can enter descriptions on the portable scanner for new products.

After the data is transferred from the portable scanner to the PC (i.e. after the data is inserted into the appropriate database tables), a temporary file named

"C:\TrackEm3Files\PDT\_DATA\PRODUCTO.SAV" is stored on the PC in the event you need to use the data in another application. It contains multiple lines, each line containing a FROM LOCATION #, TO LOCATION #, BARCODE #, QUANTITY, USER ID (optional), NEW PRODUCT DESCRIPTION (only for new products) and DATE / TIME record was entered on the scanner. This temporary file will be replaced with new data the next time receiving data is uploaded from the portable scanner.

NOTE: If a scanned barcode contains fewer characters that the specified MINIMUM or more than the specified MAXIMUM, the portable barcode scanner will emit an error tone and then require you to scan a different barcode. Consult the System Admin section of this manual for more information on setting MIN / MAX values.


## CYCLE COUNT ITEMS (anything with non-unique numbers)

Data entered from the CYCLE COUNT screen (Figure 76) will yield the following changes to the database:

- The existing INVENTORY table record (based on barcode number and location) is updated to reflect the new quantity. If no INVENTORY record exists for this barcode / location code combination, then one is added.
- If the PRODUCT does not exist, the user can add their descriptions on the scanner and they are added to the database (unless the ADD NEW PRODUCTS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- If the LOCATION does not exist in the database, it will be added to the database with a description of 'LOCATION ADDED BY PDT' (unless the ADD NEW LOCATIONS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- A new record is added to the INVENTORY CYCLE HISTORY table. The FROM LOCATION value is set to "CYCLE COUNT RECORD".

As noted above, new products can be added (default) or optionally treated as invalid entries and not added. Note: Figure 59 illustrates how to specify whether to add new products or treat them as invalid entries. The user can enter descriptions on the portable scanner for new products.

After the data is transferred from the portable scanner to the PC (i.e. after the data is inserted into the appropriate database tables), a temporary file named

"C:\TrackEm3Files\PDT\_DATA\CYCLE.SAV" is stored on the PC in the event you need to use the data in another application. It contains multiple lines, each line containing LOCATION #, BARCODE #, QUANTITY, USER ID (optional), NEW PRODUCT DESCRIPTION (only for new products), and DATE / TIME record was entered on the scanner.

# NOTE: The CYCLE COUNT option will over-right existing PART / LOCATION inventory records. This means that if 2 records with the same part number and location number are entered into the scanner, only the 2<sup>nd</sup> record is loaded into the Track'Em database.

NOTE: If a scanned barcode contains fewer characters that the specified MINIMUM or more than the specified MAXIMUM, the portable barcode scanner will emit an error tone and then require you to scan a different barcode. Consult the System Admin section of this manual for more information on setting MIN / MAX values.





Data entered from the ASSET TRACKING screen (Figure 77) will yield the following changes to the database:

- The existing ASSET table record is updated with the new LOCATION and STATUS CODE. The lookup key is the ASSET BARCODE NUMBER. Entry of the status code is optional and can be skipped by merely pressing the <ENTER> key. Note: Asset records on the PC with more recent LAST UPDATED date/time stamps will NOT be updated with older scanner data if you select that setting on the Setup Form. History data will still be recorded.
- If an ASSET does not exist, the user can add its descriptions on the scanner and it is added to the database (unless the ADD NEW ASSETS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- If the LOCATION does not exist in the database, it will be added to the database with a description of 'LOCATION ADDED BY PDT' (unless the ADD NEW LOCATIONS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- If the STATUS CODE does not exist in the database, it will be added to the database with a description of 'STATUS ADDED BY PDT' (unless the ADD NEW STATUS WHEN LOADING PORTABLE SCANNER DATA settings is not checked see SYSTEM ADMIN section).
- If the new location has a CHECKED OUT value of TRUE, then the asset will be considered Checked Out. A new Due Date will be calculated based upon current date/time, the CHECK OUT PERIOD and the MINUTES GRACE value. Track'Em will look for a CHECK OUT PERIOD value in the following order: ASSET RECORD, CATEGORY RECORD, SETUP TABLE and use the 1st value found.
- If the new location has a CHECKED OUT value of FALSE, then the asset will be considered Checked In.
- A new record is appended to the ASSET HISTORY table. The asset's previous location will be written to the history record's FROM LOCATION field and the new location will be written to the TO LOCATION field. For CHECK IN records, it will also include the DUE DATE and a T/F value for "CHECKED IN OVERDUE?".
- If the asset is a kit, then the associated component records will be assigned new locations and history records for the component movement / usage (for inventory) will be added.
- The SCANNED / UPDATED SINCE LAST RESET flag for this asset is set to TRUE.

As noted above, new assets can be added (default) or optionally treated as invalid entries and not added. Note: Figure 59 illustrates how to specify whether to add new assets or treat them as invalid entries. The user can enter descriptions on the portable scanner for new assets.

After the data is transferred from the portable scanner to the PC (i.e. after the data is inserted into the appropriate database tables), a temporary file named

"C:\TrackEm3Files\PDT\_DATA\ASSETS.SAV" is stored on the PC in the event you need to use the data in another application. It contains multiple lines, each line containing a LOCATION #, BARCODE #, STATUS CODE (optional), USER ID (optional), NEW ASSET DESCRIPTION (only for new assets), and DATE / TIME record was entered on the scanner.

NOTE: If a scanned barcode contains fewer characters that the specified MINIMUM or more than the specified MAXIMUM, the portable barcode scanner will emit an error tone and then require you to scan a different barcode. Consult the System Admin section of this manual for more information on setting MIN / MAX values.

## DATA EDIT MENU

The Data Edit Menu (Figure 78) allows you to see how many records have been added for each type of data (Figure 79a). It also allows you to delete accidentally entered data. You can delete invalid records from the portable using one of three methods. You can merely delete the most recent record added (Figure 79b), you can delete all records and start over (Figure 79c), or you can scroll through the entire record set and select the specific record you wish to delete (Figure 79d).



• Prior to deleting data, you will need to Enter 1 (YES) or 0 (NO) to confirm your choice.

• A final screen reading "PRESS ANY KEY TO RETURN TO MAIN MENU" will be displayed after the question is answered and action is completed.

## DATA LOOKUP MENU

You can optionally send (download) product, asset, location, status descriptions, and user ID numbers to the portable scanner. This is accomplished from the ADVANCED SYSTEM ADMIN MENU – DOWNLOAD DESCRIPTIONS TO PORTABLE BARCODE SCANNER (Figure 81). The 1<sup>st</sup> 20 characters of a record's description is displayed on the portable scanner, either when the DATA LOOKUP option is used (Figure 82), or when the record is scanned during data collection via main menu items 1,2,3 or 4 (Receive Items, Move or Ship Items, Cycle Count Items, Track Assets).

On the portable scanner screen, a description will replace the barcodes that are scanned in the Receive Items, Move or Ship Items, Cycle Count Items, and Track Assets functions. If a description is not loaded on the portable scanner for a specific barcode, then the user will be prompted to enter a new description as shown below in Figure 80. Figure 80 illustrates a location's description being displayed ("LOCATION 1 HERE") and the prompt that is displayed for a new item ("NEW ITEM. KEY DESC").



If the description for a barcode is changed on the PC, it must be resent to the portable scanner.

The standard portable scanner provided with Track'Em has 512k on-board memory, of which approximately 176k is available for data storage. The download files each consist of two columns as shown in Table 18. Portable scanners with additional memory (2.5 MB or 4.5 MB) are available from RVB Systems Group.





Figure 82a

ENTER OR SCAN ITEM
1
SPROCKET
LAST KNOWN TOTAL QTY
50
LOCATION CODE
100
H A S Q T Y = 25
Figure 82b



EN	T	E	R		0	R		S	C	A	N		A	S	S	E	T	
1_	_	_	=	-	-	_	_	_	_	-	_	_	-	_	_	_	_	_
AS	2	E	1		U	E	2	L	ĸ	1	۲	-		Н	E	ĸ	E	
LA	S	T		K	N	0	W	N		L	0	c	A	Т	Ι	0	N	
10																		
WA	R	E	H	0	U	S	E											

Figure 82b illustrates the last know data for item 1. Figure 82c illustrates the scanner display when a scanned item, asset, location or status is not stored on the scanner.

Produc	t Lookup File (C:\TrackEm3Files\ILOOKUP.TXT)				
1.	Product barcode – 1 to 20 characters				
2.	Product description – 1 to 20 characters				
3.	Last known total quantity				
4.	Last known location code with greatest quantity - 1 to 20 characters				
5.	Quantity of last known location code with greatest quantity				
Asset L	Asset Lookup File (C:\ TrackEm3Files\ALOOKUP.TXT)				
1.	Asset barcode – 1 to 20 characters				
2.	Asset description – 1 to 20 characters				
3.	Location code – 1 to 20 characters				
4.	Location description – 1 to 20 characters				
Locatio	on Lookup File (C:\ TrackEm3Files\LLOOKUP.TXT)				

1.	Location code – 1 to 20 characters
2.	Location description – 1 to 20 characters
Status I	Lookup File (C:\ TrackEm3Files\SLOOKUP.TXT)
1.	Status code – 1 to 20 characters
2.	Status description – 1 to 20 characters
User ID	File (C:\ TrackEm3Files\USERS.TXT)
1.	User ID number
Min / M	lax Data Len File (C:\TrackEm3Files\MINMAX.TXT)
1.	Asset's location barcode minimum number of characters
2.	Asset's location barcode maximum number of characters
3.	Asset's barcode minimum number of characters
4.	Asset's barcode maximum number of characters
5.	Product's "From Location" barcode minimum number of characters
6.	Product's "From Location" barcode maximum number of characters
7.	Product's "To Location" barcode minimum number of characters
8.	Product's "To Location" barcode maximum number of characters
9.	Product's barcode minimum number of characters
10.	Product's barcode maximum number of characters
	Table 18

The portable scanner is pre-loaded with 2 test records for each of the four lookup categories. These are numbers 1 and 2 for each type.

## Portable Scanner Communications Setup

The portable scanner communications screen (Figure 83) contains the default settings for communications and filenames used by Track'Em. All values <u>EXCEPT THE COMM PORT</u> <u>NUMBER</u> should not be changed without support from RVB Systems Group.

Prior to using the portable scanner provided with Track'Em, you must select the correct COM PORT number as shown below. If you do not already have a SERIAL TO USE driver installed, you need to install the USB driver and select COM 3 or higher (COMM PORT SELECTION IN FIGURE 83 MUST MATCH FIGURE 84A). The USB driver is located on the Track'Em CD and is named USB Driver.zip. Consult the manual section titled USB Driver for more information.

🛃 Track'Em	🖉 Track'Em - Scanner Setup 🔅 😳							
WARNING! Do N	WARNING! Do NOT change FILENAMES without RVB Systems support. You do NOT need to change anything here in order to run over a network.							
Scanner Comm S	Scanner Comm Software C:\Program Files\Unitech America Inc\PTComm Manager\PtComm.exe Select File							
Select Comm Port (USB cable requires selection of 3 or higher) Data Files Scanner Engine Scanner Engine Scanner Engine C:\TrackEm3Files\HT\JENG.EXE Select File Batch Files Batch Files Batch Files								
RECEIVING	C:\TrackEm3Files\PDT_DATA\productn.t:	Select File	RECEIVING	C:\TrackEm3Files\ProductIn_ht.trk	Select File			
SHIP / MOVE	C:\TrackEm3Files\PDT_Data\producto.txt	Select File	SHIP / MOVE	C:\TrackEm3Files\ProductOut_ht.trl	Select File			
CYCLE COUNT	C:\TrackEm3Files\PDT_Data\cycle.txt	Select File	CYCLE COUNT	C:\TrackEm3Files\cycle_ht.trk	Select File			
ASSETS	C:\TrackEm3Files\PDT_Data\Assets.txt	Select File	ASSETS	C:\TrackEm3Files\assets_ht.trk	Select File			
Product Desc	C:\TrackEm3Files\ilookup.txt	Select File	Product Desc	C:\TrackEm3Files\p_desc_ht.trk	Select File			
Location Desc	C:\TrackEm3Files\llookup.txt	Select File	Asset Desc	C:\TrackEm3Files\a_desc_ht.trk	Select File			
Asset Desc	C:\TrackEm3Files\alookup.txt	Select File	Location Desc	C:\TrackEm3Files\I_desc_ht.trk	Select File			
Status Desc	C:\TrackEm3Files\slookup.txt	Select File	Status Desc	C:\TrackEm3Files\s_desc_ht.trk	Select File			
User Names	C:\TrackEm3Files\users.txt	Select File	Users	C:\TrackEm3Files\user_codes_ht.tr	Select File			
Password	C:\TrackEm3Files\password.txt	Select File	Min / Max	C:\TrackEm3Files\minmax_ht.trk	Select File			
Min / Max Vals	C:\TrackEm3Files\minmax.txt	Select File	Pgm Scanner	C:\TrackEm3Files\\$ht3.pcb	Select File			
			Batch Status	C:\\$jgp.sts	Select File			
	Check Batch Status File							

Figure 83

Note: The values in the PORTABLE BARCODE SCANNER SETUP FORM (Figure 83) should NOT be changed when running over a network.

## **USB** Driver

The USB cable requires the installation of the USB driver. This driver is located on the Track'Em CD as well as the Track'Em installation directory and is named USB Driver Setup.exe.

- 1. Turn on scanner and connect to PC with USB cable.
- 2. Run the program named USB DRIVER SETUP.exe. (located on CD and Track'Em installation directory)
- 3. When driver installation is completed successfully, the driver will appear on the DEVICE MANAGER screen as shown in Figure 84a.
- 4. Set Track'Em portable scanner COM port on Figure 83 to the virtual port shown in Figure 84a.



Figure 84a

## Portable Scanner (PDT) Communications Software

The portable scanner (PDT) communications software is automatically installed on your PC in the default directory C:\Program Files\Unitech America Inc\PTComm Manager\PtComm.exe. This program is automatically started whenever you select any of the Track'Em options that communicate with the portable scanner.

If you have problems with the portable scanner communicating with Track'Em, start the PT Communications program (PTCOMM) and make sure that <u>"AUTO DETECT BAUD RATE"</u> button is clicked as shown in Figure 84b. Selecting the TRANSFER menu and then CONNECT PORTABLE will display the screen shown in Figure 84c. If the AUTO DETECT BAUD RATE is now enabled, select CANCEL and retry the Track'Em to scanner communications option.

## NOTE: You do NOT need to select USB port in Figure 84c even if using the USB cable. The USB driver uses a VIRTUAL USB SERIAL PORT as shown in Figure 84a.

#### NOTE: <u>DO NOT HAVE PTCOMM RUNNING WHILE ATTEMPTING TO SEND DATA</u> <u>TO/FROM SCANNER USING TRACK'EM</u>. THIS WILL CAUSE A COMMUNICATIONS ERROR.





Installing PT Communications PC's running Windows 7 (64 bit) OS

The Unitech HT630 portable barcode scanner provided with Track'Em Standard requires the usage of a Unitech communications program named PTComm. If you are running Windows 7 in 64 bit mode, you must install this communications program using the file on the Track'Em CD named as follows:

### CD:\Windows 7 (64 bit) PT Comm\JobGenPlusWithPT\_Comm.msi

This installation routine will also install the Unitech program named "JobGen" which can be used in conjunction with the Track'Em Developer CD to customize the Track'Em program residing on the Unitech HT630 portable barcode scanner.

## Reload Portable Scanner with Track'Em Program

This menu option (Figure 85) opens the Portable Scanner Communications program and automatically re-loads the scanner with Track'Em. You should always erase any existing data on the PDT before reloading it with the Track'Em program.

🛛 Program Scanner 🛛 🛛 🔀
WARNING! This options should only be used if the portable scanner does not display the Track'Em scanner menus when it is turned on.
This option will take several minutes. 3 files will be sent to your scanner (drivers, screen, password settings). Make sure your scanner is connected and click the button below.
NOTE! You must first COLD BOOT the scanner in order to ERASE ALL EXISTING DATA prior to running this option.
Click to Send Program to Portable Scanner
Figure 85

The batch file consists of the following lines:

ECHO: Download Track'Em for HT-630 ADDRESS: A PORTABLE: HT-630 DIRECTION: Download FASTSPEED: yes FILE(OVERWRITE): "C:\TRACKEM3FILES\HT\AUTOEXEC.EXE" //JOB'S EXECUTION FILE FILE(OVERWRITE): "C:\TRACKEM3FILES\HT\DATAEDIT.EXE" //DATA EDIT FILE FILE(UPDATE,CHECKROM,OVERWRITE): "C:\TRACKEM3FILES\HT\JENG.EXE" //JOB ENGINE FILE(OVERWRITE): "C:\TRACKEM3FILES\PASSWORD.TXT" //USER ID LOOKUP FILE FILE(OVERWRITE): "C:\TRACKEM3FILES\MINMAX.TXT" //MIN MAX LOOKUP FILE

If you installed the Track'Em files anywhere besides the default directory, you will have to manually edit the above batch file. After the batch file completes, a success or a failure message will appear on the PC. You will need to reload descriptions and user ID numbers (Figure 81) after reloading the Track'Em software.

## Track'Em Label Printing Module

Track'Em provides several options to print barcode labels. You can print simple barcode labels on an  $8\frac{1}{2} \times 11$  sheet of labels using any standard office printer OR you can purchase the optional Deluxe Labeling Module to print more complex barcode labels using any type of thermal transfer printer.

Labeling Menu	
THIS IS MY (	COMPANY
Track'Em™ - Version 3.18 - Copyright by R\	/B Systems Group - All Rights Reserved
Print Barcode Labels on 8 1/2 x 11 Sheets	Print Labels (Requires Bartender Professional
	Print Labels (Requires Bartender Automation
	Setup Bartender Labeling Software
Label Log Report	
Purge Label Log Table	
Add / Edit Label Log Data - Datasheet	Main Menu

Figure 86

## Printing Labels - Track'Em Standard Method

The standard version of Track'Em allows you to print simple barcode labels for PRODUCT, ASSET or LOCATION records to any standard office printer capable of printing  $8\frac{1}{2} \times 11$  address labels. You can choose between Avery label template 5160 (2 5/8" wide x 1" high) or template 5161 for barcode numbers requiring a wider label (4" wide x 1" high). These labels contain a Code 39 barcode and a description as shown in Figures 87b and 87c.

When you select this option from the Labeling Menu, the screen shown in Figure 87a will appear. You can print a label for single records, labels for multiple records (by clicking on multiple

records) or labels for all records. You can select to update the Label Log with what was printed. Consult the Label Log section for details regarding this option.

If you are printing PRODUCT labels, you can automatically update the Track'Em on-hand database table with the number of labels printed. Choosing this option updates the inventory location that has been assigned an INITIAL LOCATION value of TRUE. The quantity for that item located in the initial location is updated to include the number of labels printed. If no location record has been set with INITIAL LOCATION = TRUE, then the user is warned and no inventory record is added (Fig 89b). An inventory history record will be written with the FROM LOCATION = "PRINT LABEL RECORD" and the TO LOCATION = whichever location is set to be the INITIAL LOCATION.

If you decide to modify any of these label templates for size and/or content, you will need to use the tools provided with a licensed copy of Microsoft Access. These label templates are reports in Track'Em named as follows:

- Product label templates rpt3BarcodeProducts or rpt3BarcodeProductsLarge
- Asset label templates rpt3BarcodeAssets or rpt3BarcodeAssetsLarge
- Location label templates rpt3BarcodeLocations or rpt3BarcodeLocationsLarge



Figure 87a

Track	'Em Asse	et Labels	
		TLO Hostor	16 Mittier - Sergen Hanne Hanne Han Frank Hanne Han
Page:		gure 87b	

LASER PRINTER	17 LCD Monitor	16 Monitor - Sonya
1	100001	100002

#### Figure 87c

## Printing Labels Using Bartender (Deluxe Add-On)

Track'Em has been designed to work with Seagull Scientific's Bartender Labeling Software (Figure 88). Bartender software is available in 2 editions (Professional or Automation) which can be used with Track'Em. Sample label templates designed with Bartender and configured to use Track'Em data are also provided.

Prior to running the Track'Em menu options which print labels using the Bartender software, Bartender Automation or Professional must be installed. After installing Bartender, you will need to specify it's location in the form shown in Figure 91.



Figure 88

## Print Labels – Bartender Automation Edition Method

The Print Labels – Bartender Automation Edition method provides a seamless interface between Track'Em and Bartender. You merely select the database record you wish to print and labels containing any of the associated fields such as description, color, model number are automatically printed. Additionally, this method allows you to automatically update the Track'Em database with receiving information such as item received, purchase order number, quantity and location. This method also can optionally write a record to the database for each label printed (Label Log).

After selecting the Print Labels (Bartender Automation) menu option, a screen is displayed which allows you to select the type of label (Asset, Items, or Locations). Select that label type's record using the drop down list box (Figure 88), and enter the number of labels to print. Note: Due to the nature of the interface between Track'Em and Bartender, a different label template is used for printing a single record verses printing all records at once. The names of these label templates are specified in the Label Software Setup Form (Figure 91).

	abel Type	<u> </u>				
	ASSETS C	ITEMS CLOCATIONS				
Select	100002		×			
ASSET from	Barcode	Asset Description				
List	2					
	100003 16 Monitor - Sonya					
	100002 16 Monitor - Sonya					
	100001					
🗖 Update	100005	19 Monitor - Sonya				
number		100004 19 Monitor - Sonya				
Enter Numb	Print Labels record only	formation regarding this print job for selected <sup>©</sup> Print labels for ALL records in database				
of Labels to Print		Print Labels				
	Note: This menu option r	equires Bartender Enterprise Edition or greater.				

## Update Track'Em Database with Label Data - Automation Edition

If you use the Bartender Automation Edition method to print labels for ITEMS (Fig 89a), you have the option to update the on-hand inventory value for that item. This updates the inventory location that has been assigned an INITIAL LOCATION value of TRUE. The quantity for that item located in the initial location is updated to include the number of labels printed. If no location record has been set with INITIAL LOCATION = TRUE, then the user is warned and no inventory record is added (Fig 89b). An inventory history record will be written with the FROM LOCATION = "PRINT LABEL RECORD" and the TO LOCATION = whichever location is set to be the INITIAL LOCATION.

🗷 Track'Em	Label Prin	ting Form			X	
Select a La	abel Type					
C	ASSETS	• ITEMS	C LOCATIONS			
Select				*		
PRODUCT from List						
Purchase Order (Optional entry. Recorded in LABEL LOG table. Also recorded in INVENTORY HISTORY table if UPDATE INVENTORY selected) Update INVENTORY and INVENTORY HISTORY tables with the number of labels printed Update LABEL LOG table information regarding this print job						
		Figure	89a			

Track	'Em 🔀
ţ)	INVENTORY table not updated. No LOCATION record has been set as the INITIAL LOCATION.
	Er og

Figure 89b.

## Print Labels – Bartender Professional Edition Method

The Print Labels – Bartender Profession Edition method allows you to open a Bartender label template from Track'Em. You can then use the Bartender SELECT RECORDS window (Fig 92) to select specific records. This method does not allow you to automatically update the Track'Em database with inbound inventory counts or label printing history.

Track'Em Label Printing Form						
Select a Label Ter						
Start Bartender and Open Selected Label Template						
Note: This menu opt	tion requires Bartender Professional Edition or greater.					
	Figure 90					

## Bartender Labeling Software Setup

**The value in BARTENDER PROGRAM DIRECTORY shown in Figure 91 must match the location where Bartender was installed on your system.** This can be a directory on your local PC or a network location.

If you are using the Automation Edition method, each ASSET and PRODUCT record in the database can be assigned a label template name. This is done using the ADVANCED forms for products and assets (Figures 17 and 38). If no template name is assigned to a specific item, then the template name entered in the Label System Setup screen (Figure 91) will be used.

Track'E	m / Bartender	Label Sy	stem Setu	чр	×
Bartender	Enterprise Edition P	arameters			-
Product Label - Single Record	C:\TrackEm3Files\ProductL abel.btw	< Select Label	Product Label -   All Records	C:\TrackEm3Files\ProductL abelAll.btw	< Select Label
Asset Label - Single Record	C:\TrackEm3Files\AssetLab el.btw	< Select Label	Asset Label - All Records	C:\TrackEm3Files\AssetLab elAll.btw	< Select Label
Location Label - Single Record	C:\TrackEm3Files\Location Label.btw	< Select Label	Location Label - All Becords	C:\TrackEm3Files\Location LabelAll.btw	< Select Label
Bartender Comm Line Parameter( Bartender		Parameters	6		
Bartender Produ Label	ct C:\TrackEm3Files\ProductL	abelPro.btw		< Select Label	
Bartender Asset Label	C:\TrackEm3Files\AssetLab	elPro.btw		< Select Label	
Bartender Location Label	C:\TrackEm3Files\Location	LabelPro.btw		< Select Label	
Bartender Directory	Program C:\Program Files\Sea	agull\BarTender\8.(	D\bartend.exe	< Select Location	
			01		

Figure 91

The BARTENDER COMMAND LINE PARAMETER setting in Figure 91 is the default value and should not be modified without carefully consulting the Bartender software help files.

The label templates used by the Automation Edition method include an SQL clause that targets a specific record in the Track'Em database. This clause is illustrated in Figure 97b. The label

templates used by the Professional Edition method do not include this clause. You can target a specific Track'Em database record using the Professional Edition by selecting the SELECT RECORDS button on the PRINT MENU (Figure 92). Consult the Bartender Help Files for additional information regarding selecting database records.

*	🕸 Select Records 📃 🗖 🔀							
	Record: ( 1 ) 1 of 5 I Show All Fields Refresh							Refresh
ΙΓ		*		Barcode	ProductDescShor	t		
	L	1	1		SPROCKET			~
	2	1	1001		RS-232 9 PIN FEMALE			_
	3	1	123		3/8" NUT			
Ŀ	1	1	2		COPY PAPER			
Ŀ	5	1	200001		PRINTER CABLE			
								×
L			<					>
5	elect	ted Reco	ords:			Sho <u>w</u> Re	ecords:	
	1					All		*
E:	Example: 1,3,7-10,50							
	OK Cancel Help							
					02			

Figure 92

## Label Log

When you print using the Automation Edition method, you also have the option to update the Label Log file regarding this print job. If you select this option, a record is added to the Track'Em database for each label printed. You should periodically purge this information using the screen shown in Figure 93a.

🔀 Track'Er	m - Delete Label Log	×
	Delete Label Log Options	
	Delete all records older than 6 months	
	C Delete all records older than 1 year	
	C Delete all records older than selected date	
	Selected Date	
	Delete Label Log File	
	Figure 93a	

You can view / add / edit records in the Label Log table using the menu option titled Add / Edit Label Log Data – Datasheet (Figure 93b).

	ltem	Description	# of Labels	Date Labeled	Label filename	Barcode	User	PO
	100002	16 Monitor - Soi	1	4/9/2007	C:\TrackEm3File	100002		
×			0					
				Figure 93b				

You can view a report showing all Label Log data using the menu option titled Label Log Report (Figure 93c).

			-				
By Month	Item	Description	# of Labels	Date	Label Name	User ID	PO
April 2007							
100002	16 Monitor	- Sonya	1	09-Apr-07	C:\TrackEm3Files\Asset Label	.bt w	

Figure 93c

## How to Modify Default Label Templates

The label templates provided with Track'Em<sup>™</sup> (named AssetLabel.btw, LocationLabel.btw, and ProductLabel.btw for printing a single database record one at a time with Bartender Automation; AssetLabelAll.btw, LocationLabelAll.btw, and ProductLabelAll.btw for printing all Track'Em database records at one time with Bartender Automation. Professional Edition templates - AssetLabelPro.btw, LocationLabelPro.btw, and ProductLabelPro.btw) are simple examples of labels you can print using Track'Em and BarTender. Your application will likely require more complex labels. The simplest method of creating new labels for your application is to open the existing label template (Fig 94 – AssetLabel.btw) and save it as another filename. You can then add objects onto the new label template.

The label templates used by the Automation Edition method to print individual database records include an SQL clause that targets a specific record in the Track'Em database. This clause is illustrated in Figure 97b. The Automation edition templates designed to print all records at once as well as the label templates used by the Professional Edition method do not include this clause. You can target a specific Track'Em database record using the Professional Edition by selecting the SELECT RECORDS button on the PRINT MENU (Figure 92).



Figure 94 (Asset Label.btw)

After adding a new barcode or text field, right click it and Figure 95 will appear.



Select PROPERTIES and Figure 96 will appear. Change the DATA SOURCE to DATABASE FIELD as shown in Figure 96. A list of the available fields will be displayed. In this example, the list contains the fields in the Track'Em ASSETS table.

Modify Selected Text Object 🛛 🛛 🗙
Font Text Data Source Position General
Source: 💷 Database Field 💌 🕺
Options
Ejeld Name: Model
Sample Data: Field: tblAssets.Model
More Options
Database Connection Setup
Advanced >>
OK Cancel Help

Figure 96

Clicking on the DATABASE CONNECTION SETUP button shown in Figure 96 will yield the screens shown in Figures 97a- 97d. WARNING – Changes to any of these setting will prevent Track'Em from properly printing labels.

Figure 96 shows which database field is used for this object. If you want to use another field, select it from the USE FIELD dropdown list box on this screen. Consult your BarTender on-line help manual for additional information.

Figure 20       Image: Control     Image: Contro     Image: Contro <t< th=""><th>Database Connection Setup</th><th>Database Connection Setup</th></t<>	Database Connection Setup	Database Connection Setup
Figure 97a Figure 97a Additionalify Additionalify Additi	Austade Tables: Table to Lipe: Table to Lipe	Addsonalifyot     Addsona
Database Connection Setup       Image: Status Browse         Indexbases       Indexbases       Indexbases       Indexbases       Indexbases       Indexbases         Indexbases       In		
Database Connection Setup       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Status Browse       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Status Browse       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Status Browse       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Status Browse       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Status Browse       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Status Browse       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Additurative:       Additurative:       Image: Connection Setup       Image: Connection Setup         Additurative:       Additurative:       Additurative:       Additurative:       Image: Connection Setup       Image: Connection Setup         Additurative:       Connection       Additurative:       Additurative:       Image: Connection Setup       Image: Connection Setup         Additure:       Departmenting       Connection       Additurative:       Image: Connection Setup	Figure 97a	Figure 97b
Allocabuses         Allocabuses         Additionalified		Database Connection Setup
Figure 97c Figure 97d	Al Detabuses Additionalificat Dependentificat Dependentificat Dependentificat Dependentificat Additionalificat Additionalificat Additionalificat Additionalificat Dependentificat Additionalificat Dependentificat Additionalificat Additionalificat Additionalificat Additionalificat Additionalificat Additionalificat Additionalificat Dependentificat Additionalificat Addit	Al Databases         Al Databases         Additionalified         Database lypic         Otabases         Type:         OBCOD         Database lypic         Additionalified         Additionalified         Additionalified         Additionalified         Additionalified         Additionalified         Database lypic         Otabases lypic         Outabase lypic         Disponse         Disponse         Alag         Disponse         Additionalified         Alag         Disponse         Additionalified         Additionalified         Alag         Disponethate </td

## **ODBC** Setup for Labels

Track'Em will automatically setup the ODBC DSN (Open Data Base Connectivity - Data Source Name) described in the preceding section. This DSN will allow Track'Em to properly print labels designed using Seagull Scientific's BarTender software.

In the event this ODBC DSN is accidentally deleted or modified, the following steps should be used to reset the DSN.

Step 1 – Open the ODBC DATA SOURCE ADMINSTRATOR tool provided with Windows (Figure 98). This is normally located in the CONTROL PANEL group, ADMINSTRATIVE TOOLS sub-group. Select the SYSTEM DSN tab and click ADD (Figure 74). Click the ADD button. NOTE: YOU WILL NEED ADMINSTRATOR RIGHTS ON YOUR PC IN ORDER TO SETUP THE ODBC DSN.

ODBC	Data	Source	Admir	nistrate	or 🥐 🗙
User DSN Sy	istem DSN	File DSN Dr	ivers   Tracing	Connection F	Pooling About
<u>S</u> ystem Data	Sources:				
Name		Driver		<u>^</u>	A <u>d</u> d
					<u>R</u> emove
					<u>C</u> onfigure
1					
🔰 🚺 th	ne indicated		e stores informa A System data T services.		
	[	OK	Cancel	Apply	Help
		Fi	gure 98		

Step 2 – Select MICROSOFT ACCESS DRIVER as shown in Figure 99 and then click FINISH.

Create New Data Source
Select a driver for which you want to set up a data source.
< Back Finish Cancel

Figure 99

Step 3 - Enter "TrackEm3" for the Data Source Name (DSN) in Figure 100 and click SELECT

ODBC Microsoft Access Setup	? 🗙
Data Source <u>N</u> ame: TrackEm3	OK
Description: Asset and Inventory Tracking Application Database	Cancel
Database: C:\TrackEm3Files\TrackEm3.mdb	<u>H</u> elp
Select Create Repair Compact	<u>A</u> dvanced
- System Database	
<ul> <li>None</li> </ul>	
🔿 Database:	
System Database	Options>>
Figure 100	

Step 4 – Select TrackEm3.mdb (C:\TrackEm3Files\TrackEm3.mdb) and click OK

Step 5 – After clicking OK on Figure 100, Figure 101 will appear as shown. Click OK and the ODBC DSN is complete.

<b>Ø</b> C	DBC Data	Source Administrato	or 🤶 🗙
Use	er DSN System DS	N File DSN Drivers Tracing C	Connection Pooling About
S	ystem Data Sources		
	Name	Driver	A <u>d</u> d
	TrackEm3	Microsoft Access Driver (*.mdb)	<u>R</u> emove
			<u>C</u> onfigure
			<b>~</b>
	🤇 the indica	System data source stores informatio ted data provider. A System data so ichine, including NT services.	
		OK Cancel	Apply Help

Figure 101

## Running Track'Em over a Network

Track'Em can be installed to run on a network so that multiple PC's can share the Track'Em database. Follow these directions in order to setup Track'Em to run on a network.

- 1. Run the Track'Em setup CD on the network server.
- 2. Run the Track'Em setup CD on each PC (client) that will be using Track'Em
- 3. Manually change each client's Track'Em desktop shortcut properties to point to the Track'Em database (TrackEm3.mdb) located on the network server.
- 4. If you are using the LABELING MODULE, then you need to manually change the ODBC DSN to point to the network version of the database. See the ODBC notes in the LABELING MODULE section of this manual.

Note: The values in the PORTABLE BARCODE SCANNER SETUP FORM (Figure 83) should NOT be changed when running over a network. The scanner should always be connected to a PC on the network.

## Linking to Track'Em from another Database

If you own a licensed copy of Microsoft Access, you can link Track'Em data tables to existing databases. The following figures illustrate how to link to the Track'Em tables.

After opening an Access database (new or existing), select FILE | GET EXTERNAL DATA | LINK TABLES as shown in Figure 102.

_									
	🖉 Micros	oft Ac	cess						
	<u>File</u> Edit	<u>V</u> iew	Insert	<u>T</u> ools	<u>W</u> indow	<u>H</u> elp			
ľ	New 1						Ctrl+N		
I	൙ Oper	n					Ctrl+O		
I	<u>G</u> et B	Externa	Data				l	🖌 🛃 Import	
I	⊆lose	•						♦⊞ Link Tables	
	El Save	:					Ctrl+5		
_						100			

Figure 102

Select the file named TrackEm3.mdb. The default directory is C:\TrackEm3Files.

After selecting the Track'Em database, a list of available Track'Em tables will be displayed as shown in Figure 103. Select the tables you would like to use in your existing database.

🛎 TrackEm	n3 : Database (Access 2002 - 2003 file format) 💶 🗖	X
©pen ₩De	esign 🔄 New   🗙   🐁 😳 🧱 🏢	
Objects Tables Queries Forms Reports Pages Macros Modules Groups	<ul> <li>Create table in Design view</li> <li>tblInventoryExportRows</li> <li>Create table by using wizard</li> <li>tblInventoryHistory</li> <li>Create table by entering data</li> <li>tblInventoryHistoryExportRows</li> <li>tblAssetExportRows</li> <li>tblAssetHistory</li> <li>tblAssetHistoryExportRows</li> <li>tblAssetHistoryImportRows</li> <li>tblAssetHistoryImportRows</li> <li>tblAssetS</li> <li>tblCategories</li> <li>tblProductExportRows</li> <li>tblCategoryExportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryExportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCategoryImportRows</li> <li>tblCycleCountHistoryExportRows</li> <li>tblStatusExportRows</li> <li>tblImport</li> <li>tblImport</li> <li>tblInventory</li> <li>tblInventory</li> <li>tblInventory</li> <li>tblInventoryCycleHistory</li> </ul>	
	Figure 103	

After selecting one or more tables, the Access database screen will appear as shown in Figure 104. You are now able to create your own custom queries, forms and reports in your existing database using the data stored in Track'Em.



Figure 104

## Track'Em System Files

Filename	On Scanner	Purpose / Notes
C:\TrackEm3Files\TrackEm3.mdb	NO	Access database file (replaced by TrackEm3.mde on demo CD)
C:\ TrackEm3Files \TrackEm3Manual.pdf	NO	User's Manual (this document)
C:\TrackEm3Files \GettingStarted.pdf	NO	Getting Started Guide
C:\ TrackEm3Files\PORTABLE SCANNER OpManual.pdf	NO	PORTABLE SCANNER Operator's Manual
C:\TrackEm3Files\TE3 DeveloperManual.pdf	NO	(DEVELOPER ADD-ON ONLY)
C:\TrackEm3Files\VbaSourceCodeForms.pdf C:\TrackEm3Files\VbaSourceCodeModules.pdf	NO	Listing of all Track'Em VBA source code (DEVELOPER ADD-ON ONLY)
C:\ TrackEm3Files \HT\Autoexec.exe	YES	Portable scanner program – compiled version
C:\ TrackEm3Files \HT\Dataedit.exe	YES	Portable scanner program – compiled version
C:\TrackEm3Files\Autoexec.jpg C:\TrackEm3Files\Dataedit.jpg C:\TrackEm3Files\ScannerSoftwareFlowchart.pdf	NO	Portable scanner programs – source code version (DEVELOPER ADD-ON ONLY)
C:\ TrackEm3Files\Alookup.txt	YES	Asset lookup file
C:\TrackEm3Files\Ilookup.txt	YES	Item lookup file
C:\TrackEm3Files\Llookup.txt	YES	Location lookup file
C: TrackEm3Files\\Slookup.txt	YES	Status lookup file
C:\ TrackEm3Files\Users.txt	YES	User ID lookup file
C:\TrackEm3Files\Password.txt	YES	"Use password on scanner?" file
C:\TrackEm3Files\Minmax.txt	YES	Minimum / Maximum barcode lengths
C:\ TrackEm3Files \HT\JENG.EXE	YES	HT630 scanner driver file
C:\TrackEm3Files\\$ht3.pcb	NO	File used to reload HT630 scanners w/ TrackEm
C:\TrackEm3Files\AssetLabel.btw	NO	BT Template for Assets (Automation Edition)
C:\TrackEm3Files\AssetLabelAll.btw	NO	BT Template for Assets (Automation Edition)
C:\TrackEm3Files\AssetLabelPro.btw	NO	BT Template for Assets (Pro Edition)
C:\TrackEm3Files\LocationLabel.btw	NO	BT Template for Locations (Automation Edition)
C:\TrackEm3Files\LocationLabelAll.btw	NO	BT Template for Locations (Automation Edition)
C:\TrackEm3Files\LocationLabelPro.btw	NO	BT Template for Locations (ProEdition)
C:\TrackEm3Files\ProductLabel.btw	NO	BT Template for Products (Automation Edition)
C:\TrackEm3Files\ProductLabel.btw	NO	BT Template for Products (Automation Edition)
C:\TrackEm3Files\ProductLabelPro.btw	NO	BT Template for Products (Pro Edition)
C:\TrackEm3Files\TE3.ico	NO	Track'Em icon
C:\TrackEm3Files\9pin.jpg	NO	Sample data bitmap
C:\TrackEm3Files\CopyPaper.jpg	NO	Sample data bitmap
C:\TrackEm3Files\Moniter.jpg	NO	Sample data bitmap
C:\TrackEm3Files\Printer Cable.jpg	NO	Sample data bitmap
C:\TrackEm3Files\Assets_ht.trk	NO	HT630 Batch file – asset data
C:\TrackEm3Files\Cycle_ht.trk	NO	HT630 Batch file – cycle count data
C:\TrackEm3Files\ProductIn_ht.trk	NO	HT630 Batch file – receiving data
C:\TrackEm3Files\ProductOut_ht.trk	NO	HT630 Batch file – move / ship data
C:\TrackEm3Files\p_desc_ht.trk	NO	HT630 Batch file – product descriptions
C:\TrackEm3Files\a_desc_ht.trk	NO	HT630 Batch file – asset descriptions
C:\TrackEm3Files\l_desc_ht.trk	NO	HT630 Batch file – location descriptions
C:\TrackEm3Files\s_desc_ht.trk	NO	HT630 Batch file – status descriptions
C:\TrackEm3Files\user_codes_ht.trk	NO	HT630 Batch file – user codes
C:\TrackEm3Files\minmax_ht.trk	NO	HT630 Batch file – Min / Max values
C:\TrackEm3Files\PtCommInstall.msi	NO	PORTABLE SCANNER communications installation program (Also on CD)
D:\Access Runtime Files\AccessRT.msi D:\Access Runtime Files\AccessRT.cab	NO	ONLY ON CD – access runtime installation files

C:\Windows\System32\ComDlg32.ocx	NO	Windows system file - only added if not present
C:\Windows\System32\ComCat.dll	NO	Windows system file – only added if not present
C:\Windows\System32\StdOle2.tbl	NO	Windows system file – only added if not present
C:\Windows\system32\asycfilt.dll	NO	Windows system file – only added if not present
C:\Windows\system32\olepro32.dll	NO	Windows system file – only added if not present
C:\Windows\system32\oleaut32.dll	NO	Windows system file – only added if not present
C:\Windows\system32\msvbvm60.dll	NO	Windows system file – only added if not present
C:\Windows\system32\Mstext40.dll	NO	Windows system file – only added if not present
C:\Windows\system32\Odtext32.dll	NO	Windows system file – only added if not present
C:\Windows\system32\Msexcl35.dll	NO	Windows system file – only added if not present
C:\Windows\system32\Msexcl40.dll	NO	Windows system file – only added if not present
C:\Windows\System32\Vb6ext.olb	NO	Windows system file – only added if not present
C:\Windows\System32\dao360.dll	NO	Windows system file – only added if not present
C:\Windows\System32\VBACV10.DLL	NO	Windows system file – only added if not present
C:\Windows\System32\VBACV10D.DLL	NO	Windows system file – only added if not present
C:\Windows\System32\VBACV20.DLL	NO	Windows system file – only added if not present
C:\Windows\System32\VBE6EXT.OLB	NO	Windows system file – only added if not present
C:\Windows\System32\VBE6.DLL	NO	Windows system file – only added if not present
C:\Windows\Fonts\30F9_NEW.TTF	NO	Code 3 of 9 barcode font
D:\Documentation\	NO	User's manual, technical documents, etc
D:\USB Driver.zip	NO	USB Driver
D:\ Windows 7 (64 bit) PT Comm\	NO	Scanner communications installation for Windows 7
JobGenPlusWithPT_Comm.msi		64 bit. Instructions in same directory
	Table 12	•

Table 12

Track'Em Reports The following table contains a list of all of the reports provided with Track'Em, along with the query or table used by the report and the form or menu option macro used to open the report.

Report Title	Report Name in Access	Report Description		
	Query or Table for report data			
	Report opened by (menu macro or form			
	name)			
Assets by	rpt3AssetsSortedByBarcode	Shows all assets sorted by barcode number. Includes location		
Barcode	qryAssetReports	and status.		
	MENU mcrAssetsReports.AssetsByBC			
Assets by	rpt3AssetsByCat	Shows selected asset(s) by selected category(s). With or without		
Category	rpt3AssetsByCatPrice	current value		
0.	qryAssetReports			
	frmAssetsBySelection			
Assets by Date	rpt3AssetsByDateAcquired	Only includes asset records which contain a value in the Date		
Acquired	qryAssetAcquired	Acquired field		
-	MENU mcrAssetsReports.AssetsByDate			
Assets by	rpt3AssetsByDept	Shows selected asset(s) by selected department(s). With or		
Department	rpt3AssetsByDeptPrice	without current value		
	qryAssetReports			
	frmAssetsBySelection			
Assets by	rpt3AssetsSortedByDescription	Shows all assets sorted by description. Includes location and		
Description	qryAssetReports	status.		
	MENU mcrAssetsReports.AssetsByDesc			
Assets by	rpt3AssetsByLocation	Shows selected asset(s) by selected location(s). With or without		
Location	rpt3AssetsByLocationPrice	current value		
	qryAssetReports			
	frmAssetsBySelection			
Assets in New	rpt3AssetsByCatNewLoc	Shows asset(s) by selected location(s) that are in a different		
Location by	rpt3AssetsByCatNewLocPrice	location the most recent time scanned than they were the		
Category	qryAssetsInNewLocation	previous time scanned. With or without price.		
	frmAssetsBySelection			
Assets in New	rpt3AssetsByDeptNewLoc	Shows asset(s) by selected location(s) that are in a different		
Location by	rpt3AssetsByDeptNewLocPrice	location the most recent time scanned than they were the		
Department	qryAssetsInNewLocation	previous time scanned. With or without price.		
	frmAssetsBySelection			
Assets in New	rpt3AssetsByLocationNewLoc	Shows asset(s) by selected location(s) that are in a different		
Location by	rpt3AssetsByLocationNewLocPrice	location the most recent time scanned than they were the		
Location	qryAssetsInNewLocation	previous time scanned. With or without price.		
	frmAssetsBySelection			
Assets in New	rpt3AssetsByStatusNewLoc	Shows asset(s) by selected location(s) that are in a different		
Location by	rpt3AssetsByStatusNewLocPrice	location the most recent time scanned than they were the		
Status	qryAssetsInNewLocation	previous time scanned. With or without price.		
	frmAssetsBySelection			
Assets in New	rpt3AssetsByModelNewLoc	Shows asset(s) by selected location(s) that are in a different		
Location by	rpt3AssetsByModelNewLocPrice	location the most recent time scanned than they were the		
Model	qryAssetsInNewLocation	previous time scanned. With or without price.		
A	frmAssetsBySelection			
Assets by	rpt3AssetsCost	Shows assets by selected location, days out, daily rate and total costs. Check In / Out Menu		
Location – Days	qryAssetReports frm AssetLeastionCostPenerts	COSIS. Check III / Out Ivienu		
Checked Out	frmAssetLocationCostReports	Shows salasted asset(s) by salasted model(s) Assets ======		
Assets by Models	rpt3AssetsByModels	Shows selected asset(s) by selected model(s). Assets records		
Models	rpt3AssetsByModelsPrice	not assigned models are not included. With or without current		
	qryAssetReports	value. Note: Model Number must equal Part Number from		
A	frmAssetsBySelection	Products table		
Assets by Next	rpt3AssetByNextSch	Assets listed by Next Scheduled Maintenance (date). Assets		
Scheduled Maintananaa	qryAssetMaint	without a value for this field are not listed in report. Note: Date		
Maintenance	MENU mcrAssetsReports.AssetsBySch	value is not limited to maintenance.		

mpi3AssetByStatusPrice qryAssetBySeports fmmAssetBySelection     current value:       Assets Strapped prj3AssetBisCrap qry3AssetBySelection     Assets with SCRAPPED value = TRUE qry3AssetBisCrap qry3AssetBisCrap qry3CheckedOut fmCheckedOutByCat qryCheckedOut fmCheckedOutByCat qryCheckedOut     Assets currently checked out by category. Check In / Out Menu qryCheckedOutByCat fmCheckedOutByCat qryOverDue gryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryOverDue fmCheckedOutByCat qryDimesCheckedOut fmTimesCh			
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qryBarcodeLabelData			Product barcode labels using Avery label template 5160 & 5161
	Products		
frmDrintLabolaTE			
		frmPrintLabelsTE	

I abol I ar	rptI aball og	List of labels printed by date range selected.
Label Log	rptLabelLog qry3LabelLogReport	List of fabers printed by date range selected.
	MENU - mcrLabelLogReport	
Products Sorted	rptProductsSortedByBC	Report show all records in Product Master table and is sorted by
by Barcode	qryProductReports	barcode number. Includes on-hand quantity, but no locations.
	MENU - mcrProductsReports.ByBC	······································
Products Sorted	RptProductsSortedByCat	Report show all records in Product Master table and is grouped
by Category	qryProductReports	by product category. Includes on-hand quantity, but no
	MENU - mcrProductsReports.ByCat	locations.
Products Sorted	rptProductsSortedByDesc	Report show all records in Product Master table and is sorted by
by Description	rptProductsSortedByDescPrice	description. Includes on-hand quantity, but no locations. With
	qryProductReports	or without pricing.
	MENU - mcrProductsReports.ByDesc	
Products Sorted	MENU- mcrProductsReports.ByDescPrice rptProductsSortedByProduct	Report show all records in Product Master table and is sorted by
by Product	qryProductReports	part number. Includes on-hand quantity, but no locations.
Number	MENU - mcrProductsReports.ByNumber	part number. menudes on-nand quantity, but no locations.
All Products	rptProductsReorderPoint	Current inventory records. Includes on-hand inventory and re-
Reorder / On	qryProductReports	order point. Includes all items.
Hand Report	MENU - mcrProductsReports.ReorderAll	1
Product Reorder	rptProductsReorderNow	Current inventory records. Includes on-hand inventory and re-
Report	qryReorder	order point. Only includes items that need to be re-ordered.
	MENU - mcrProductsReports.ReorderNow	
Product Reorder	rptReorderByVendor	Current inventory records by selected primary vendor. Includes
by Primary	qryReorderByVendors	on-hand inventory and re-order point. Only includes items that
Vendor Report	frmInventoryByVendor	need to be re-ordered.
Product Reorder	rptReorderByVendorAlt qryReorderByVendorsAlt	Current inventory records by selected alternate vendor. Includes on-hand inventory and re-order point. Only includes items that
by Alternate Vender Benert	frmInventoryByVendor	need to be re-ordered.
Vendor Report Inventory by	rpt3InventoryByBC	Current inventory records sorted by product barcode. With or
Barcode	rpt3InventoryByBCPrice	without pricing.
Darcouc	qry3Inventory	without pricing.
	frmInventoryReportsMultiSelect	
Inventory by	rpt3InventoryByCat	Current inventory grouped by selected category(s). With or
Category	rpt3InventoryByCatPrice	without pricing.
	qry3Inventory	
	frmInventoryByCat	
Inventory by	rpt3InventoryByDept	Current inventory grouped by selected department(s). With or
Department	rpt3InventoryByDeptPrice	without pricing.
	qry3Inventory	
<b>T</b> / 1	frmInventoryByCat	
Inventory by	rpt3InventoryByDesc rpt3InventoryByDescPrice	Current inventory sorted by product description. With or
Product Description	qry3Inventory	without pricing.
Description	frmInventoryReportsMultiSelect	
Inventory by	rpt3InventoryByLocation	Current inventory grouped by selected location(s). With or
Location	rpt3InventoryByLocationPrice	without pricing.
	qry3Inventory	
	frmInventoryLocationReports	
Inventory by	rpt3InventoryByProduct	Current inventory sorted by product number. With or without
Product Number	rpt3InventoryByProductPrice	pricing.
	qryInventory	
	frmInventoryReportsMultiSelect	
Inventory by	rpt3InventoryByVendorPrim	Current inventory records by selected primary vendor. With or
Primary Vendor	rpt3InventoryByVendorPrimPrices	without pricing.
Timary venuor	qry3InventoryVendorPrim	
Timary venuor	frmInventorybyVandor	
	frmInventorybyVendor rpt3InventoryByVendorAlt	Current inventory records by selected alternate yender. With or
Inventory by	rpt3InventoryByVendorAlt	Current inventory records by selected alternate vendor. With or without pricing
Inventory by Alternate	rpt3InventoryByVendorAlt rpt3InventoryByVendorAltPrices	Current inventory records by selected alternate vendor. With or without pricing.
Inventory by	rpt3InventoryByVendorAlt	

Cycle Count	rpt3CycleHis	Cycle count history by selected part / location
History by	qry3CycleCountHistory	Cycle count mistory by selected part / location
Location	frmCycleCountHistory	
Location	mileyeleeountristory	
Inventory	rpt3InvHisCat	Inventory history report. Grouped by selected category(s).
History - Sorted	rpt3InvHisCatPrices	With or without pricing.
by Category	qry3InventoryHistory	
• •	frmInventoryHistoryByCategoryMS	
Inventory	rpt3InvHisDept	Inventory history report. Grouped by selected department(s).
History - Sorted	rpt3InvHisDeptPrices	With or without pricing.
by Department	qry3InventoryHistory	
	frmInventoryHistoryByDeptMS	
Inventory	rpt3InvHis	Inventory history report. Grouped by selected TO location(s).
History - Sorted	rpt3InvHisPrices	With or without pricing.
by To Location	qry3InventoryHistory	
	frmInventoryHistoryByLocationMS	
Inventory	rpt3InvHis2Locs	Inventory history report. Grouped by selected FROM and TO
History - by	rpt3InvHis2LocsPrices	location(s). With or without pricing.
From and To	qry3InventoryHistory	
Location	frmInventoryHistoryByTwoLocationsMS	
Cycle Count	rpt3CycleHisCat	Cycle count history by selected part / category
History by	qry3CycleCountHistory	
Category	frmCycleCountHistoryCat	
Kit / Component	rptParentChildA	Includes list of all KIT records where the parent record is an
Report – Kit =	qryParentChildAA	asset.
Asset	MENU - mcrParentChildReports.A	
Kit / Component	rptParentChildP	Includes list of all KIT records where the parent record is a
Report – Kit =	qryParentChildPP	product (item).
Part	MENU - mcrParentChildReports.P	
Custom Reports	CustomReport1 – CustomReport15	These reports serve as place-holders for users that need to create
	No query or table specified	custom reports using the tools provided with Microsoft Access.
	MENU - mcrCustomReports.Custom1 to 15	

Table 13

## Customizing Track'Em

The Track'Em program was developed using Microsoft Access. The file named TrackEm3.mdb is a Microsoft Access database file that contains forms, reports, queries, data tables (objects), and source code developed using Visual Basic for Applications (VBA). If you own a licensed copy of Microsoft 2003 or higher, you can edit any of these Track'Em objects using Access. In order to view or edit any of these objects, press and hold the SHIFT key when starting Track'Em. This will prevent the Track'Em startup macro from running and the Access database window will be displayed.

WARNING – DO NOT DELETE ANY OF THE FIELDS IN ANY OF THE TRACK'EM TABLES. There are numerous lines of VBA code which reference all of the fields contained in the Track'Em tables. If you do not need a specific field, you should use the tools provided with Track'Em on the Advanced System Admin Menu to HIDE that field.

#### You should always create a backup of the entire database file (C:\TrackEm3Files\TrackEm3.mdb) prior to starting any customization.

You can modify the design and layout of any Track'Em form or report using the tools provided with MS Access. Do not delete fields on forms; if you do not want to see a specific field on a form, set its VISIBLE property from YES to NO.

📽 Text Box: tx	tPO
txtPO	No No Control None
Enter Key Behavior	Yes Yes



There are many excellent books on the market which can help with the customization of Track'Em. Several of these are listed in the following table.

Title	Author
"Microsoft Access Inside Out"	John L. Viescas
"Microsoft Access Step by Step"	Online Training Solutions, Inc.
"Access: This Missing Manual"	Matthew MacDonald
"Microsoft Access Forms, Reports, and Queries"	Paul McFedries
Table 14	·

Additionally, RVB Systems Group is available to help with Track'em customization at our standard hourly rate. Contact RVB Systems to discuss your customization requirements.

## Microsoft Macro Security Warning

Upon installation, the Track'Em setup program will automatically set the default directory (C:/TrackEm3Files) as a TRUSTED LOCATION in the Microsoft Access Security TRUST CENTER. If you install Track'Em in a different location and depending upon the version of Access you are running and the MS Access default MACRO SECURITY LEVEL on your PC, you may encounter one or more of the following screens whenever Track'Em is started. This section of the manual describes how to eliminate this warning. Figure 7a illustrates the warning displayed when using Access 2003. Figures 7b and 7c illustrate the warning displayed when using Access 2007 and higher.

Access 2003	3 Security Warning Screen
Security Wa	arning 🛛 🗙
Opening "C:\TrackEm3Fil	les\TrackEm3.mdb"
computer.	if it contains code that was intended to harm your s file or cancel the operation?
Cancer	Figure 7a
Access 2007 and b	higher Security Warning Screens
Microsoft Office Security Options	Microsoft Office Access Security Notice ?X
Security Alert	A potential security concern has been identified.
VBA Macro Access has disabled potentially harmful content in this database. If you trust the contents of this database and would like to enable it for this session only, dick Enable this content.	Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.
Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source. <u>More information</u>	File Path: C:\TrackEm3FilesDemo\TrackEm3.mde This file might contain unsafe content that could harm your computer. Do you want to open this file or cancel the operation?
File Path: C: (RVB System Files (RVB Systems Databases (RVB_db.mdb	More information
Enable this content	Open Cancel
	Figure 7c
Open the Trust Center OK Cancel	

Figure 7b

A macro virus is a type of computer virus that's stored in a macro, Visual Basic for Applications (VBA) code, a form that contains an ActiveX control, a report that contains an ActiveX control, action query, data-definition query, pass-through query, or update query. **To help protect against macro viruses, you should purchase and install specialized antivirus software.** 

The following pages describe how to eliminate these annoying screens.

## Access 2003

To stop displaying macro warnings in Access 2003, change the security level to **Low** on the **Security Level** tab (on the **Tools** menu, point to **Macro**, and click **Security**) as shown in Figures 8a and 8b. **Change the security level to Low only if you are running specialized antivirus software that can check documents for macro viruses, and you are sure all the macros you use are from trusted sources.** 

Microsoft Access					
Eile Edit ⊻iew Insert	Toc	ls <u>W</u> indow <u>H</u> elp			
	180	Spelling F	7		
		Office Links	Þ		
		Speech			
		Online Collaboration	►		
	3	Relationships			
		Analyze	•		
		Database Utilities	•		
		Security	•		
		Replication	►		
		Startyp			
		Macro	→	2	⊻isual Basic Editor Alt+F11
	ਣ	ActiveX Controls		60	Microsoft Script Editor Alt+Shift+F11
		Add-Ins	►		Security
	3	AutoCorrect Options			Run <u>M</u> acro
		Oustomize			Convert Macros to Visual Basic
		Options			Create Menu from Macro
					Create Toolbar from Macro
					Create Shortcut Menu from Macro
			-		



Figure 8a

The screens shown in Figures 8c and 8d will also appear when changing the Macro Security Level. You should select YES on both of these screens.

	Trac	k'Em 🔀			
	1	For the Medium or High macro security levels to function properly, your computer must also be configured to block unsafe expressions.         Blocking unsafe expressions affects all users on this computer.         Do you want to block unsafe expressions?         Hide Hglp <       Open in Help Window			
	withou	soft Jet 4.0 Service Pack 8 or later must be installed to block unsafe expressions at affecting common functionality.			
		ck unsafe expressions, see the About Microsoft Jet Expression Service sandbox Help topic, which is available from the link at the bottom of this topic.			
		Figure 8c			
ck	'Em				
	Unsafe expressions are blocked. You can configure your computer to allow all expressions evaluated.				
5	Allowing all expressions to be evaluated affects all users on this computer.				
1	Do you want to allow the evaluation of potentially unsafe expressions?				
		Yes No Help			
		Figure 8d			

You also have the option of creating an Access 2003 personal digital certificate for your own version of Track'Em in order to eliminate this warning message while still running at Medium or High security. You should consult the Microsoft website for details on how to create a personal digital certificate.

Access 2007 and higher

To turn off the "Security Warning" shown below in Access 2007 and higher, close the opening Track'Em form and select OPTIONS. You can either ENABLE THIS CONTENT (each time) or open the TRUST CENTER and follow the directions below.



Figure 8e

Microsoft OfficeSecurity Options 💦 🛛 🔀						
छ Security Alert						
VBA Macro Access has disabled potential	y harmful content in this database.					
If you trust the contents of this database and would like to enable it for this session only, dick Enable this content.						
Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.						
More information						
File Path: C:\TrackEm3Files\TrackEm3.mdb						
Help protect me from unknown content (recommended)						
Enable this content						
Open the Trust Center	OK Cancel					
Figure 8f						

Access 2007 introduces a new tool called the TRUST CENTER. You can elect to trust files in a specific location (**Figure 8i - RECOMMENDED**) or all files (Figure 8j - NOT RECOMMENDED).

	Microsoft	Office Trusted Location ? 🗙
		n will be treated as a trusted source for opening files. If you tion, make sure that the new location is secure.
	C. (HockEndries	Browse
	Subfolders of this Description:	s location are also trusted
	Date and Time Create	ed: 3/11/2009 9:53 AM
		Figure 8g
Access Options	Trust Center	
Popular	Trusted Publishers	Trusted Locations
Current Database	Trusted Locations	Warning: All these locations are treated as trusted sources for opening files. If you change or add sure that the new location is secure.
Datasheet	Add-ins	Path Description
Datasicet	Macro Settings	User Locations C\TrackEm3Files\ Track'Em Files
Object Designers		Figure 8i
Proofing	Trust Center	
Advanced	Trusted Publishers	Macro Settings
Customize	Trusted Locations	For macros in documents not in a trusted location:
Add-ins	Add-ins	Disable all macros without notification     Disable all macros with notification
	Macro Settings	Disable all macros with notification     Disable all macros except digitally signed macros
Trust Center	Message Bar	Enable all macros (not recommended; potentially dangerous code can run)
Resources	Privacy Options	
Figure 8h		Figure 8j

You also have the option of creating an Access 2007 and higher personal digital certificate for your own version of Track'Em in order to eliminate this warning message while still running at any of the security levels. You should consult the Microsoft website for details on how to create a personal digital certificate.

## Track'Em Support

Free STANDARD LEVEL telephone, fax and e-mail support is provided to all registered user's of Track'Em for **30 days from date of purchase**. When calling for support, you will be asked for your COMPANY NAME and SOFTWARE SERIAL NUMBER.

At the conclusion of your free 30 day support period, additional support is available from RVB Systems Group as shown below. Rates subject to change.

Track'Em Extended Support – Basic Level Track'Em Extended Support – Basic Level Track'Em Extended Support – Advanced Level	\$175 / year or 5 incidents \$95 / 1/2 year or 2 incidents \$125 / hour
Track'Em on-line training (up to hours live training using your PC's internet connection)	\$250
Off-site customization of Track'Em	\$125 / hour
On-site installation / training / system integration services	Call. Rates vary by location. Travel expenses additional.

Track'Em Extended Support – Basic Level includes telephone, fax or e-mail support for installation (local PC or on a network), setup and basic operation of the Track'Em software.

Track'Em Extended Support – Advanced Level (such as help developing custom reports, forms, queries, macros, VBA code modules, linking to external databases, label design, etc.) is available at the off-site customization rate.

Service for the scanners provided with Track'Em is provided by the manufacturer. Extended portable scanner warranty plans are available from RVB Systems Group.

For more information, contact RVB Systems Group at:

6952 Wade Dr Cary, NC 27519 (919) 362-5211 - voice (919) 443-1204 - fax sales@barcode-solutions.com