



Peninsula QuickTrack Pro Installation & Operating Manual



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Installation

Double click on Setup to install the Application and associated files

A Folder called QuickTrack Pro will appear on your Hard Drive

Running QuickTrack Pro For The First Time

To Start the application

Apple Macintosh

Double click on the QuickTrack Pro Application in the Folder QuickTrack Pro in the Applications Folder

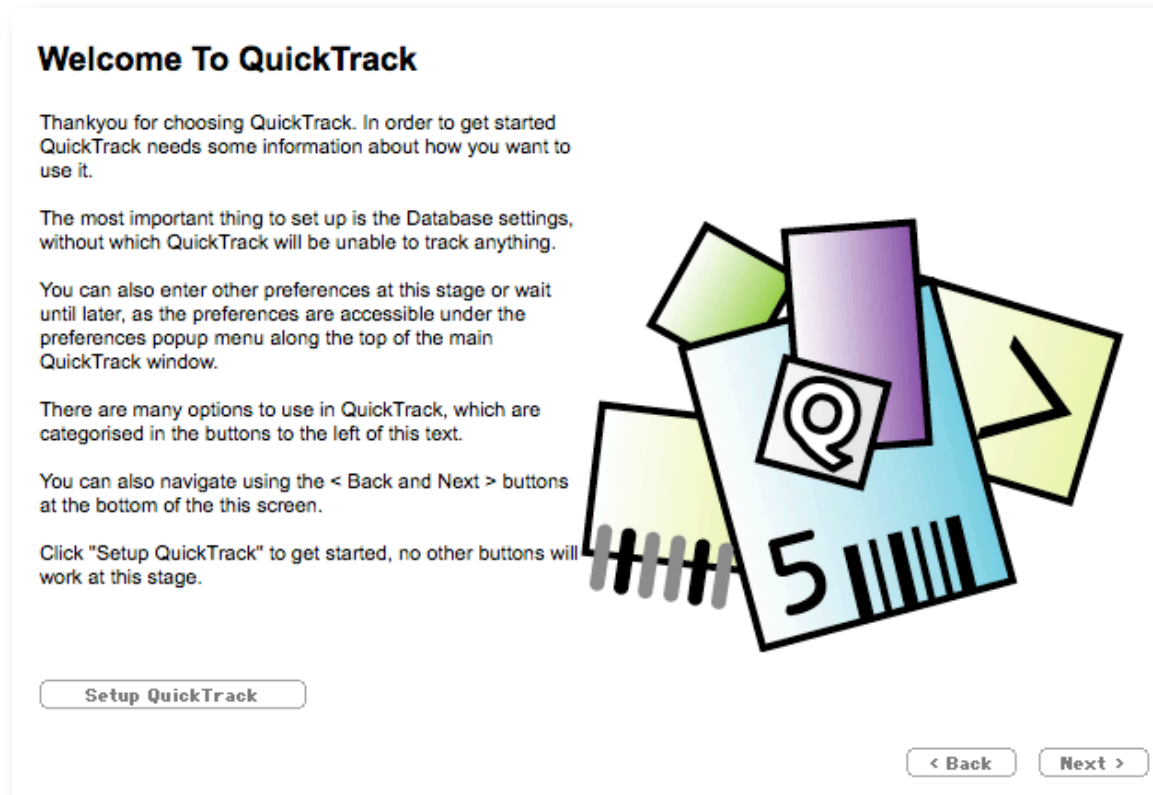
Windows

Choose QuickTrack Pro from the Peninsula section of the Start menu.

Setting Up QuickTrack Preferences

When QuickTrack Pro is started for the first time you will be required to set up the various user settings that control the way QuickTrack is used.

You will see the screen shown below.



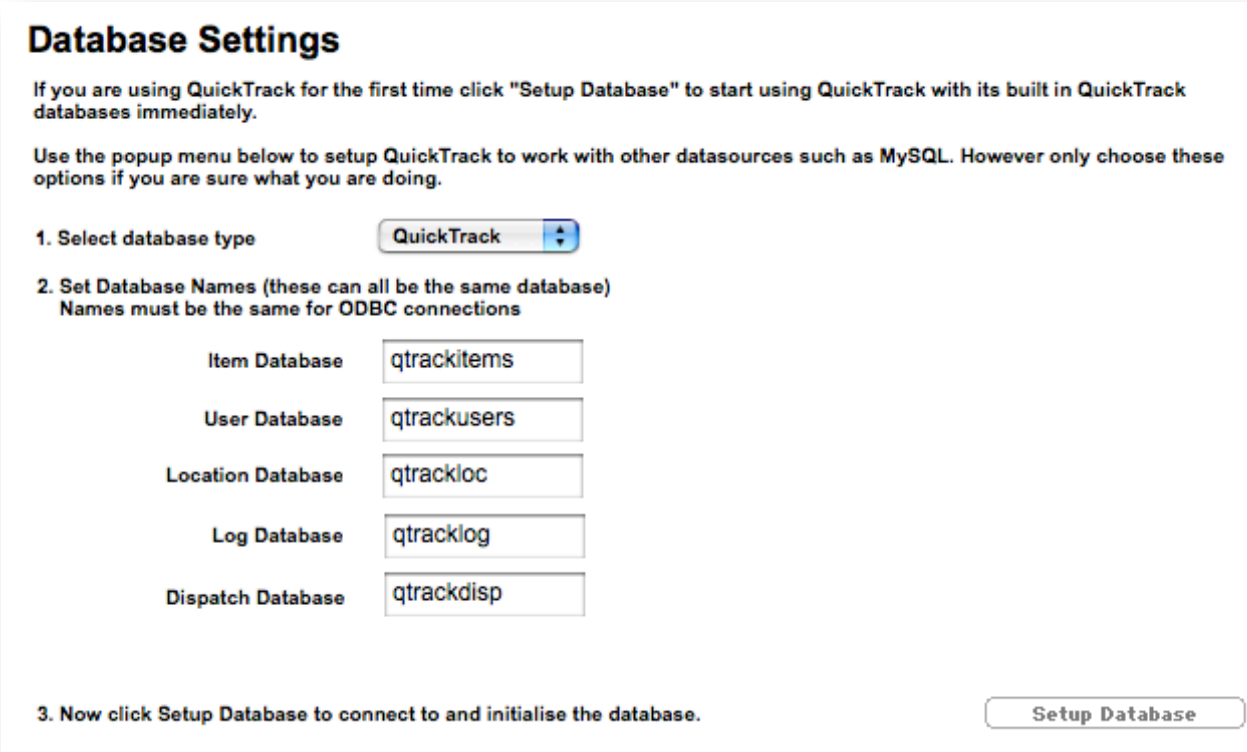
This screen explains that your about to setup all the preferences and settings for QuickTrack.

You can change settings or use the default settings, and at anytime come back to edit or change them in the future.

To setup QuickTrack to your requirements click “Next >” or “Setup QuickTrack”.

Database Preferences

This will take you to the database setup screen where you can specify which kind of database to use and the database names (you can of course not change any settings if you don't need to and use the default settings).



Database Settings

If you are using QuickTrack for the first time click "Setup Database" to start using QuickTrack with its built in QuickTrack databases immediately.

Use the popup menu below to setup QuickTrack to work with other datasources such as MySQL. However only choose these options if you are sure what you are doing.

1. Select database type QuickTrack

2. Set Database Names (these can all be the same database)
Names must be the same for ODBC connections

Item Database	qtrackitems
User Database	qtrackusers
Location Database	qtrackloc
Log Database	qtracklog
Dispatch Database	qtrackdisp

3. Now click Setup Database to connect to and initialise the database.

Setup Database

In order to use the built in QuickTrack database leave the settings as shown in the diagram.

QuickTrack Pro can connect to other database systems for sharing of information between users in a multiuser environment.

Databases which are currently supported are MySQL , Microsoft SQL Server (including SQL Server Express) via ODBC and ODBC data sources which comply to the SQL 92 spec.

The database names fields allow you to change the database names to identify the QuickTrack files within your system.

We would recommend you keep the default names, however if you only have access to one database in a multiuser environment ie MySQL you can name all the databases the same, please note that they must all be the same for ODBC connections.

If you are installing on MySQL, MS SQL or ODBC data sources you will be required to set up manually the database files (not the internal tables) using the appropriate Database server management application ie MySQL administrator for MySQL. Instructions for this are included later.

Using The Built In Database As The Datasource For QuickTrack

Choose QuickTrack from the popupmenu at the top of the screen.

Click "Setup Database".

Using MySQL As The Datasource For QuickTrack

Download the version of MySQL 4.1 or 5 for your operating system from

<http://dev.mysql.com/downloads/mysql/4.1.html>

For Windows choose "Windows (x86)"

For OSX choose the version appropriate to your computer.

Choose Save, then Save again.

The file will be downloaded.

Find the file on your computer, double click to open the file.

Run the installer or setup on windows and follow the on screen instructions.

Apple Macintosh Installation

Choose Run if the publisher cannot be verified.

Choose Typical as a setup type.

Skip MySQL.com signup.

Choose Configure the MySQL Server Now.

This will setup MySQL to run and set a root password which you will need to access the server.

Click Next

Choose Standard Configuration

Click Next

Click Next Again

Enter a root password and retype again

Click Next

Click Execute

Click Finish

Then download MySQL Administrator for your operating system.

This will allow you to set the permissions for users and databases.

<http://dev.mysql.com/downloads/administrator/1.1.html>

Choose Save

And then Save again

Run the installer and follow the on screen instructions.

Windows Installation

Choose Run if the publisher cannot be verified.

Click Next

Click Accept

Click Next

Then Next Again

Choose Complete

Click Next

Click Install

Click Finish

If at any time you wish to remove these applications you can do so via Settings,
Add Or Remove Programs in the start menu.

Setting up MYSQL to work with QuickTrack

To make your instalation very secure take a note of the ip addresses of the machines you wish to work with QuickTrack, ie 10.0.0.18

In MySQL Administrator

Enter the root password you assigned during instalation

Choose Catalogs (These are the databases on the server)

Right Click the bottom lefthand box and choose Create New Schema from the menu

Type qtrackitems and click ok

Right Click the bottom lefthand box and choose Create New Schema from the menu

Type qtrackusers and click ok

Right Click the bottom lefthand box and choose Create New Schema from the menu

Type qtrackloc and click ok

Right Click the bottom lefthand box and choose Create New Schema from the menu

Type qtracklog and click ok

Right Click the bottom lefthand box and choose Create New Schema from the menu

Type qtrackdisp and click ok

Choose User Administration

Here you can add a new user or use the existing root user.

We will alter the root users privileges

Right Click the user name and choose Add Host From Which User Can Connect from the popup menu

Enter the ip address of a machine you want to have access to the server, ie root@10.0.0.18

Then click OK

The user will appear in the left hand box.

In order to allow access from mutiple machines, either add additional users with the ip addresses of the machines or add a new host which says root@10.0.0.*

Click the user you have just made

Click the Schema Privileges tab

Select the qtrackdisp schema

Click << to move over the assigned privileges

Select the qtrackitems schema

Click << to move over the assigned privileges

Select the qtrackusers schema

Click << to move over the assigned privileges

Select the qtrackloc schema

Click << to move over the assigned privileges

Select the qtracklog schema

Click << to move over the assigned privileges

Select the qtrackdisp schema

Click << to move over the assigned privileges

Click apply changes

You can then exit from MySQL administrator is you wish.

In QuickTrack

If setting up for the first time.

On the Database Settings page

Choose mySQL in the select database type popup

Leave the Database names the same.

In Host type the ip address of your mySQL server, ie 10.0.0.5

Type the user name you have chosen to access the database, you can use the root user you setup initially.

Type the password associated with that user.

Then Click Setup Database, the server should create tables in the databases. If an error connecting is reported check you settings at both ends. Sometimes it is easy to forget to allow a certain computers ip address permission to access a certain database.

When a client reconnects when the application is started you will be asked for the user and password again in order to connect to the databases.

Thats it QuickTrack is now setup to connect to mysql.

Using Microsoft SQL Server (including Express) As The Datasource For QuickTrack

In order to setup QuickTrack to work with SQL Server you will need to create a database in SQL Server

1. Open SQL Server Enterprise Manager from the start menu and select Database.
2. Right click Database and select New Database.
3. Enter the new database name qtrackitems.
4. You should see that a new database has been created.

Create An ODBC Data Source

1. Go to the ODBC Data Source Administrator.
It is normally found in the Administration Tools.
Go to the System DSN tab and select Add.
2. The Create New Data Source window will open.

Select SQL Server.
Press Finish.

3. Type in the name that you want to give the Data Source.
In our case it is called qtrackitems.
Select (local) for the Server or enter the Server IP Address,
in the case of SQLExpress you need thenameof the machine\SQLEXPRESS.
Press Next.
4. Select With Windows NT authentication using the network login ID.
Press Next.
5. For Change the default database to:, select the database that was created in SQL Server.
In our case it is qtrackitems.
Press Next.
6. Press Finish or Next, if you pressed Next press Finish on the next screen.
7. When you run a Data Source Test, it will show you the TESTS COMPLETED SUCCESSFULLY! message.
8. When you are done, you should see the new System Data Source entry listed.

Open QuickTrack

1. In Preferences select Database Preferences.
2. Choose ODBC from the popup menu.
3. Enter qtrackitems into the four database names fields.
4. Enter qtrackitems into the Data source field.
5. Click the Setup button, QuickTrack will then ask you for a password and user name,
create the tables in the database to allow you to start using the software.

(If you get an error at this point)

"Not associated with a trusted SQL Server connection"

Solution

You probably didn't specify "Mixed Mode authentication" during the install.

- Open The SQL Server Enterprise Manager
Start menu > Programs > Microsoft SQL Server > Enterprise Manager)
- Expand the tree-control until you can your server
- Right click on the server name and "SQL Server Properties (Configure)" window will open
- Select the Security tab
- For "Authentication", select "SQL Server and Windows"

Click "OK" to close the window and then "Yes" to restart SQL Server

Your data connection is now setup.

Setting Up The Default Settings

Once your database is set up you will be taken to the default settings screen shown below.

This controls many of the user customisable basic settings available within QuickTrack.

Default Settings

Days Of Loan Period (Default)

Loan Options

Booking Mode

☐ Book Multiples Of Items

☒ Select ID Box on New Record

☐ Show Overdue items when booking

☐ Make Entry Screens Read Only

☐ Print Receipt When Booking

☐ Confirm When Booking

Opening Screen

Fine Amount Fine Period

☐ Reorder Level Warning at Startup

Customise Header

Backup location

Database location

< Back Next >

Cancel OK

The settings are used as follows.

Days Of Loan Period.

This is the automatically generated return date for an item which is booked out, this return date can be changed when the item is booked out by tying a date into the return box.

Loan Options.

This enables the software to cope better with overdue items and allows the exclusion of weekends from when an item should be returned to allow for closure of the place of issue and return.

Booking Mode.

This popup menu allows the software to operate in various modes.

Book In/Out.

The standard mode is Book In/Out which allows items to be leant out and returned as in a library or tool room situation.

Despatch Book In/Out.

This mode allows for the software to book a number of items out or in to the same person without entering their user id each time an item is scanned.

This allows for a goods in /out situation or a library where more than one book is borrowed at the same time. To end an entry in despatch mode type **** or scan the End Despatch Mode barcode.

Timekeeper (No Book In.

This mode allows for the tracking of an item or person around a building, and as such items are never booked back in no booking back in is needed.

Timekeeper (Book In/Out).

This mode allows for the entry and exit of people in a work or leisure environment.

Seperate Book In/Out.

This mode is Book In/Out where the booking in or booking out are done separately, to allow complete control over what is done by the user, which allows items to be leant out and returned as in a library or tool room situation.

Seperate Despatch Book In/Out.

This mode, again with seperate screens for booking in or booking out, allows for the software to book a number of items out or in to the same person without entering their user id each time an item is scanned.

This allows for a goods in /out situation or a library where more than one book is borrowed at the same time. To end an entry in desptach mode type **** or scan the End Despatch Mode barcode.

Location Manager (No Book In).

This mode allows you to book users to items rather than items to users. In this way multiple users can be linked to one item, can be used to record how many people have attended an event (in this case the items are the events).

Despatch With Serial Numbers (Seperate Book In Out).

In this mode mutiple items can be despatched or booked in while also recording their serial numbers, ideal for parts tracking.

As such an item will have an identification number and also a list of serial numbers recorded in its log. This information can be recalled in reports to allow for full serial number tracking. To end an entry in desptach mode type **** or scan the End Despatch Mode barcode.

That ends the Booking Mode menu.

Book Multiples Of Items.

(This option is not in the Schools version as it complicates the library setup with multiples of the same book.)

This allows the software to hold a stock (inventory) level for each item recorded in its database.

Once set this will add a quantity field to the booking in and out screen so that multiples of an items can be dealt with at once in one record.

This allows for the maintenance of stock levels where the items are held in bins and do not require unique identification.

If not set the software will automatically book in or out an item without the need to enter a quantity.

Select ID Box On New Record.

This enables QuickTrack to select the top field on the item screen rather than the next box down.

This allows QuickTrack to override the automatic numbering of items and allows you to enter your own numbers ie from a DVD or CD and use these as the item numbers.

Show Overdue Items When Booking.

This flags up a message when booking items for a user where the user has overdue items outstanding, this allows collection of overdue items when warned.

Make Entry Screens Read Only.

This stops entry of details into the screens showing data from the database. This provides a quick and easy way to prevent modification of data by operators. (This is not a password protected option , however there is a passworded operator level system in addition to this which will be covered elsewhere).

Print Receipt When Booking.

This option allows the automatic printing of a receipt at the end of booking out goods, useful when in despatch mode, this receipt can be customised using the reporting features.

Confirm When Booking.

This option brings up a confirmation dialog when booking items to let the operator know the operation was successful.

Customise Header.

This option allows you to change the header strip at the top of the QuickTrack Screen, if you provide a jpg image in the correct size it can replace the default image and allow you to have your organisation logo at the top of the QuickTrack screen.

Backup Location.

(QuickTrack database format databases only) this allows you to change the default Backup location, the default stores backup files in a folder called backups in the QuickTrack folder, all backups are dated. You can set this locations to anywhere you have access to.

The Backup files are for each of the databases and are suffixed with a date and time to identify them. This folder may require periodic emptying otherwise you may end up with a large amount of backups.

Database Location.

(QuickTrack database format databases only) this allows you to change the location of the databases from the QuickTrack folder to anywhere you have access to.

Opening Screen.

This allows you to change the opening screen of QuickTrack to various other screens from a popup menu, this way instead of always going to the Menu screen you could go to the Overdue Items screen or the Booking screen thus saving time.

Fine Amount.

Allows the use of fines for overdue items.

Fine Period.

Lets you set the period after which a fine is levied from the overdue date.

Once your settings are set click “Next >” to carry on to the next screen.

Internet Settings

This screen has all the network and internet related settings. Here you can control auto lookups of Book, DVD and CD details, and change proxy settings.

The screenshot shows a software interface with a sidebar on the left containing buttons for various settings: Databases, Default Settings, Internet Settings (which is highlighted), Personalities, Serial Numbers, Organisation, Passwords, Mobile Settings, Import Items, Import Users, Import Locations, and Other Options. The main area is titled "Internet Settings" and contains the following elements:

- A checked checkbox labeled "Auto lookup items on the internet".
- A "Field To Lookup" dropdown menu currently set to "ID Number".
- A text input field for the "Web Proxy Server" with a note: "Web Proxy Server (leave blank if you don't have one) Format address:port ie 192.168.2.1:8080".
- Input fields for "Username" and "Password".
- An "Email Reminder" dropdown menu.
- A "Check Internet Connection" button.
- Two unchecked checkboxes at the bottom: "Enable Websharing (Port 2080)" and "IP Sharing (Port 2081)".
- Navigation buttons at the bottom right: "< Back", "Next >", "Cancel", and "OK".

Auto Lookup On Internet.

This is on by default, this setting uses the iLookup feature of QuickTrack automatically when return is pressed in the top field on the items screen. This will lookup Books, CD's, DVD's and some Videos. This saves a huge amount of time when entering new items into your database, giving details such as name, author etc.

Field To Lookup.

This allows you to set the field which is looked up from the internet, this is useful in situations where a barcode is already on the item, for example in a library, which is not the ISBN lookup barcode that the publisher has applied.

Email Reminder.

Allows the automatic emailing of users with overdue items.

Web Proxy Settings.

If you access the internet from behind a firewall, ie at a school you may need to set proxy settings to access the automatic lookup functions of QuickTrack, you enter the proxy address in the form address:port ie 10.0.0.10:8080.

This option also allows for an optional username and password for the proxy server.

It may be that your proxy server will not allow the lookup sites, if this is the case please contact us for the site details and you can then add them to your proxy setup as allowed sites.

Check Internet Connection.

This button allows you to test your connection to internet. If this test fails it indicates there is a problem with your internet connection, which maybe caused by a proxy or firewall. Please refer to the Internet Connection problems section at the end of this manual for details.

Enable Web Sharing.

This allows QuickTrack databases to be shared over the internet using the inbuilt html pages, it is published on port 2080 rather than the normal 80, so in order use this in a browser your must type the ip address followed by a colon followed by 2080.

IP Sharing.

This allows recall of data via TCP-IP and is for use of advanced users only.

Once your settings are set click “Next >” to carry on to the next screen.

Personalities

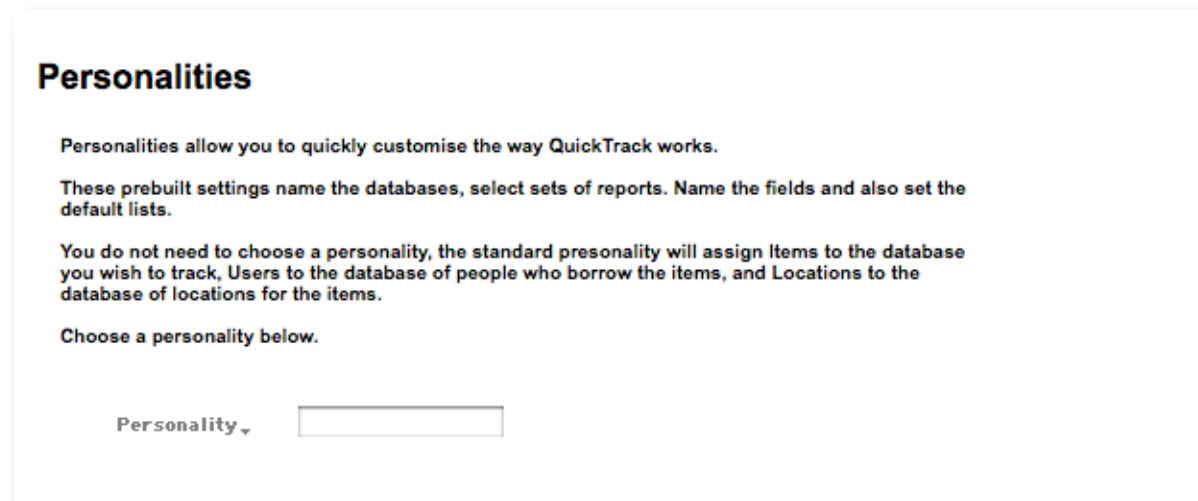
Personalities allow you to quickly customise the way QuickTrack works to a state more useful in your situation.

These prebuilt settings name the databases, select sets of reports. Name the fields and also set the default lists.

You do not need to choose a personality, the standard personality will assign Items to the database you wish to track, Users to the database of people who borrow the items, and Locations to the database of locations for the items.

However there are other sets to choose from, for example School Library, where the databases are Books, Students, and Locations, and has specific reports for the circulation of books in a library environment.

The entry screen is shown below.

The screenshot shows a web interface titled "Personalities". It contains several paragraphs of text explaining the concept of personalities and how they customize the QuickTrack system. At the bottom, there is a label "Personality" followed by a small downward-pointing arrow and an empty rectangular input box for selection.


Personalities

Personalities allow you to quickly customise the way QuickTrack works.

These prebuilt settings name the databases, select sets of reports. Name the fields and also set the default lists.

You do not need to choose a personality, the standard personality will assign Items to the database you wish to track, Users to the database of people who borrow the items, and Locations to the database of locations for the items.

Choose a personality below.

Personality 

You can choose a personality from the popup list by clicking the Personality arrow. The settings are automatically changed as soon as you leave the preferences section.

To reset all the lists and reports etc choose the Default personality.

Custom personalities can be setup by us please ask for details.

Once your settings are set click “Next >” to carry on to the next screen.

Serial Number Preferences

This screen allows you to set custom serial numbering to work with your existing system when allocating new numbers to items, users, location or transactions.

Serial Number Preferences

These settings control the serial number allocated to the next new record in each database.
Set the numbers here to tie in with your numbering system.

Please note if you set the number to less than the largest number in the database you will not be able to add any items.

Pad with 0 to

6

characters after prefix

	Prefix	Suffix
Next Item Serial Number	<input type="text"/>	<input type="text"/>
Next User Serial Number	<input type="text"/>	<input type="text"/>
Next Transaction Number	<input type="text"/>	<input type="text"/>
Next Location Serial Number	<input type="text"/>	<input type="text"/>

Each numbering system for Items, Users, Transactions (Bookings) and Locations is separate and these settings are stored locally on the users computer, so in a multiuser environment it maybe a good idea to use different prefixes for each workstation to identify where the numbers were made.

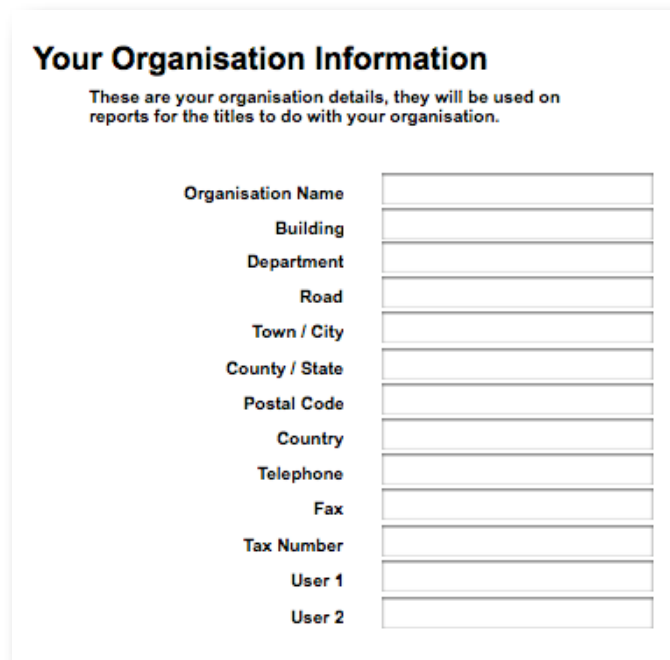
Please note that if you set the number to less than the largest number in the database you will not be able to add any new items, users or locations to the databases.

Once your settings are set click “Next >” to carry on to the next screen.

Your Organisation Information

This screen allows you to enter your organisation details for inclusion in reports that are automatically generated by QuickTrack, this allows you to customise your reports with company or organisation specific data.

Simply enter the details in the screen shown below.



The screenshot shows a web form titled "Your Organisation Information". Below the title is a subtitle: "These are your organisation details, they will be used on reports for the titles to do with your organisation." The form contains several input fields, each preceded by a label. The labels and their corresponding input fields are: Organisation Name, Building, Department, Road, Town / City, County / State, Postal Code, Country, Telephone, Fax, Tax Number, User 1, and User 2. Each label is aligned to the left of its respective input field, which is a simple rectangular box.

Label	Input Field
Organisation Name	<input type="text"/>
Building	<input type="text"/>
Department	<input type="text"/>
Road	<input type="text"/>
Town / City	<input type="text"/>
County / State	<input type="text"/>
Postal Code	<input type="text"/>
Country	<input type="text"/>
Telephone	<input type="text"/>
Fax	<input type="text"/>
Tax Number	<input type="text"/>
User 1	<input type="text"/>
User 2	<input type="text"/>

Once your settings are set click "Next >" to carry on to the next screen.

Access Passwords

Quicktrack has the facility to have different levels of access to different users using passwords.

Access Passwords

The access passwords allow you to control access for people using the system. The default is not to have passwords, which allows everybody using the system to access any part of QuickTrack.

There are various levels of access from Full access (which allows access to anything and reading and writing to records) to Read Only Access, (which only allows reading records, not writing to them)

☐ Enable Password Access

Admin (Full) Access

Admin (Reports) Access

Editing Access

Reports Access

Edit and Import Access

Read Only Access

These are entered on this screen, then when the password is entered when starting QuickTrack the level of access associated with that password is enabled.

In order to change the access level you must exit the software and restart it with the appropriate password.

The access levels are:

Admin (Full), this level allows access to all screens and features of QuickTrack including preferences.

Admin (Reports), this level allows access all of QuickTrack except the preferences, users can edit the reports with this level of access.

Editing, this level allows access to editing of records in QuickTrack but not other features such as reports etc.

Reports, this allows access to reports for viewing and printing and read only access to the records contained in QuickTrack.

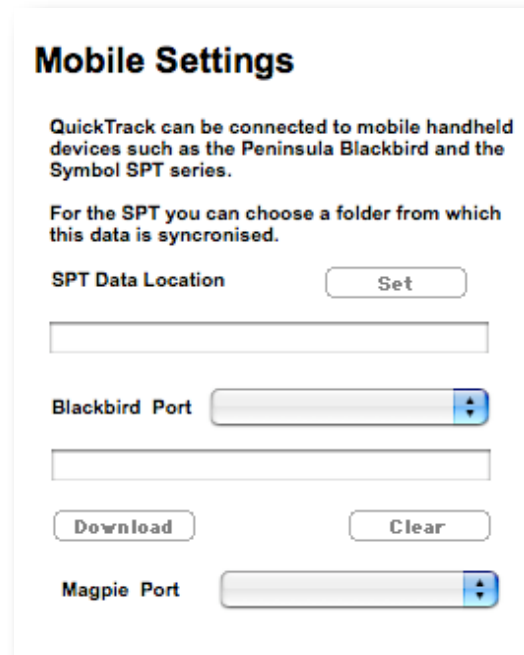
Edit and Import, this allows access to editing of records and importing from external files into QuickTrack.

Read Only, this access level has read only access to the records contained in QuickTrack.

Once your settings are set click “Next >” to carry on to the next screen.

Mobile Settings

This setup screen allows you to set locations and settings for mobile barcode reader units that connect to QuickTrack.



The screenshot shows the 'Mobile Settings' screen. At the top, it says 'QuickTrack can be connected to mobile handheld devices such as the Peninsula Blackbird and the Symbol SPT series.' Below this, it states 'For the SPT you can choose a folder from which this data is synchronised.' There is a section for 'SPT Data Location' with a 'Set' button and an empty text field. Below that is a 'Blackbird Port' section with a dropdown menu and an empty text field. At the bottom, there are 'Download' and 'Clear' buttons, and a 'Magpie Port' section with a dropdown menu.

QuickTrack can connect to both QuickTrack Mobile enabled devices running the Palm OS, this includes the Peninsula Gull and the Symbol SPT range.

Using the screen above you can setup a location for the data from the unit to be stored and synchronised.

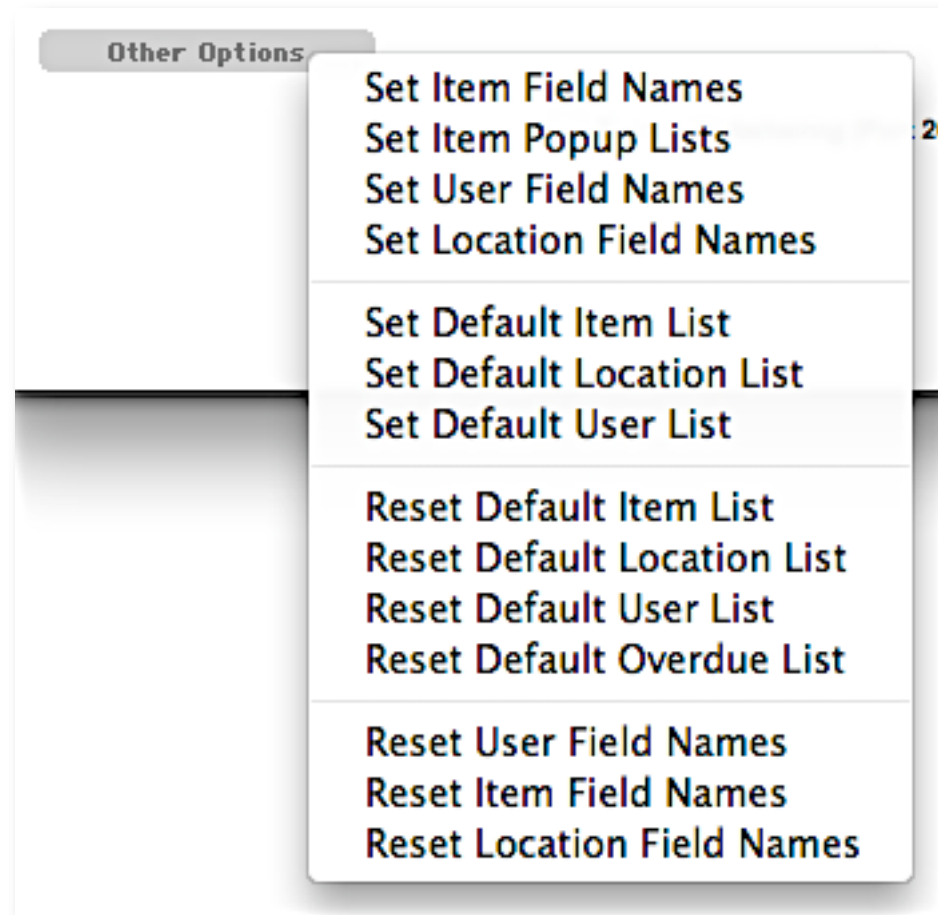
The Blackbird port popup allows you to set the usb or serial port that a Blackbird portable barcode reader is connected to.

The Magpie port popup allows you to specify the usb or serial port that a Magpie portable barcode reader is connected to.

Once your settings are set click “Next >” to carry on to the next screen.

Other Options

There are a number of options that can be set from the popup menu at the left of the preferences screen entitled Other Options.



In this menu you will find

Set Field Names (One item for each record type)

These options take you to the entry screen for the type of record you have chosen ie Items.

On the screen click the text of the field name you wish to change, type the changes and press return to save it.

Once you have finished you can return to the preferences screen.

Set Item Popup Lists

This again takes you to the entry screen for the record, to the right of the entry boxes you will see a black triangle, this is a popup menu marker, click here to show a dialog with the current settings for the popup menu. Enter or change any items you wish.

If the menu is empty it will not show a marker on the screen when in standard entry mode.

Click OK to save the popup list or cancel to revert to the current one.

Reset Features

Also in this menu are the reset controls to reset default reports and lists and field names in the case of a mistake. Simply choose the item in the popup you wish to reset and it will be reset.

Once your settings are set click "Next >" to carry on to the next screen, or OK to finish.

If you are setting up Quicktrack for the first time a QuickTrack is Setup screen will show, clicking ok on this screen will take you to the QuickTrack Main Menu.

QuickTrack Is Setup

Now you have setup QuickTrack you can start to use it.

As you have no existing items or users, you can make new items, or users by clicking the New button next to the Items or Users buttons on the Main Menu Screen.

Or you can now import data from existing CSV files using import menu at the top of the main screen.

To look up an item from the internet scan the Barcode number into the item id box at the top of the items screen. A lookup will occur and your item details filled in.

Click the OK button to be taken to the Main Menu screen.

From here you can control all of QuickTracks' functions.

if you need to change any preferences in the future click the Preferences Popup at the top of the window and choose General Preferences to be taken to this section again.

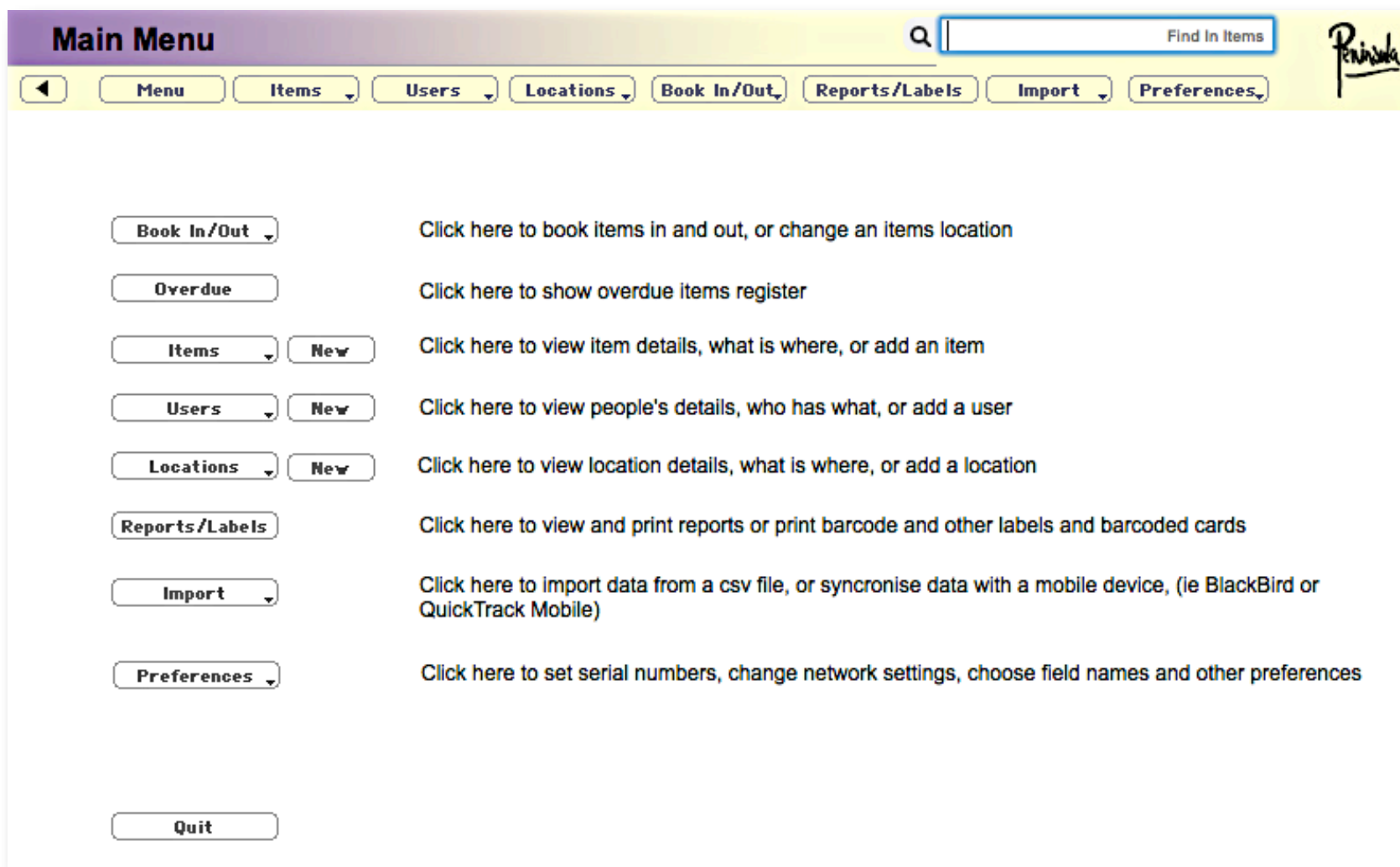


< Back

OK

The Main Menu

This screen is the main centre for QuickTrack from here you can access all of its features quickly and easily. There is also a black left arrow which when clicked will return you to what you were doing previously.



Along the top of the window are arranged popup menus to access sections of the application from anywhere in the application, these popups appear in all sections of the application.

Also of this screen are short explanations of each item, for example.

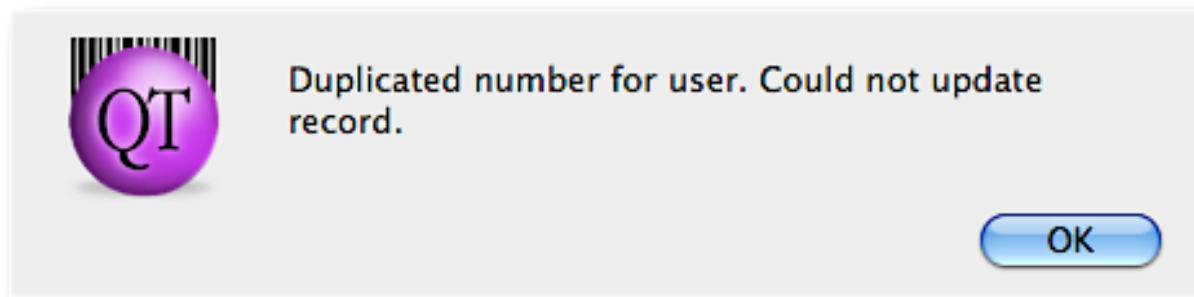
The Book In/Out popup button explains that this is where you can book items in and out of Quicktrack, or change an items location. (This button may have different text depending on what options you have chosen for personalities in the preferences or Booking Mode in the preferences).

So lets get started.

In order to use QuickTrack you will need to enter some items (books, DVDs, Files, Tools etc) and some Users (Students, Workers, Employees etc).

Adding Users

To add a user to the database click on the “New” button next to the “User Details” button. This button may be different if you have chosen a personality that changes the name of Users to for example Students.



If you receive this error whilst clicking New, you must return to the Preferences screen (Preferences -> General Preferences) and choose the serial number section. Change the User serial number to a number higher than the highest number you have already allocated in your user id numbers, type return at the end of entering to save it, then click OK to return to the main application and try again.

This screen will then appear.

User Details

Find Item's Starting

◀

Menu

Items ▾

Users ▾

Locations ▾

Book In/Out ▾

Reports/Labels

Import ▾

Preferences ▾

ID Number

000055

Title

Name

Surname

Position

Company

Building

Street

Town/City

County/State

Custom1

Custom2

Custom4

Custom5

Custom6

Custom7

Category

Custom3

Click here to add a picture

Remove

Image

Deposit Held

Items currently on loan to this person

Date	Time	Item ID	Desc	Due Back	Transaction

Delete

Update

New

Enter the users' details and return to the menu by clicking "Menu".

User Pictures

29

You can also add a picture of the user from a file (please make sure QuickTime is installed to use this feature, if you do not have it , it is a free download from Apple.com for Mac or PC).

Using a Webcam for User Pictures

Or alternatively on a pc using a webcam directly into the Image box, again QuickTime is required.

There is an extra field on this screen showing deposit held, this is for the money management section of the software where a deposit of cash can be taken from a person and returned at a later date. Click the field to add or remove a deposit from the persons record.

You do not need to click update to save the details, although you can if you wish, simply return to another screen to save details.

This screen also shows a list of items currently on loan to this person, you can click on an item in this list to be taken to the record for that item.

Adding Items

To add an item to the database click on the “New” button next to the “Item Details” button. This button may be different if you have chosen a personality that changes the name of Items to for example Books or Tools.

If an error dialog comes up stating there is a duplicated id number you will need to change the serial number settings in preferences.

Choose (Preferences -> General Preferences) and choose the serial number section. Change the Item serial number to a number higher than the highest number you have already allocated in your user id numbers, type return at the end of entering to save it, then click OK to return to the main application and try again.

The following screen should then appear.

[illegible]

Auto Lookup Of Items

This screen allows you to enter item details and use the iLookup auto catalogue function of QuickTrack.

If you have an internet connection you can automatically retrieve the details for most Books, DVDs, CDs and Videos over the internet. This allows the record to be autofilled simply by scanning the retail barcode number on the item.

All you do is click in the field that will do the lookup, the default is the item id field, but can be any field as defined in the preferences. Scan the barcode and wait for the details to be retrieved.

If the details are not retrieved it may be that you have a proxy server blocking access to the sites used to do the lookup, contact us if this is the case for the details of the websites so that you can unblock the sites on your proxy server.

This screen shows the current location of the item and also details such as when it is due back if booked out and other useful information.

Item Details

If you click the Details button at the top left of the screen above the ID Number box the screen will change to show additional information about the item, this includes cost, the number you have in stock (if you have multiples of the item), a photograph if required (or cover in the case of auto retrieved items).

Item History

This allows you to show different lists for the items history. The lists are

Item Booking History

This is a list of who the item has been booked out to over time, you can adjust the timescale using the boxes above the list.

Item Location History

This is a list of the locations the item has been in over time, as items can be booked out to both a location and a user if required. This allows the item to reside in one place when not booked out and also to be booked out as well.

Item Component List

This contains a list of components for the item. This may be a case of books or a set of tools or even the parts of something in production by yourselves. You can click on a component to be taken to the record for that item.

Item Reservation List

This is a list of current reservations for the item

Depreciation

This button shows the depreciation rates and current value of the item. This can be useful in compiling an asset value over time list.

Adding Locations

Items can be booked to specific location, this allows the item to have a permanent location back at base while also being able to be booked out to users for external use.

To add an item to the database click on the “New” button next to the “Location Details” button. This button may be different if you have chosen a personality that changes the name of Locations to for example Shelf.

If an error dialog comes up stating there is a duplicated id number you will need to change the serial number settings in preferences.

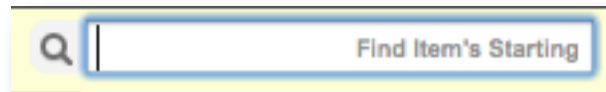
Choose (Preferences -> General Preferences) and choose the serial number section. Change the Location serial number to a number higher than the highest number you have already allocated in your user id numbers, type return at the end of entering to save it, then click OK to return to the main application and try again.

The following screen should then appear.

Finding Item, User or Location Records

Quicktrack has more than one way of finding a specific record or set of records. The easiest way to find records is using the find box at the top right of the QuickTrack window.

The Find Box

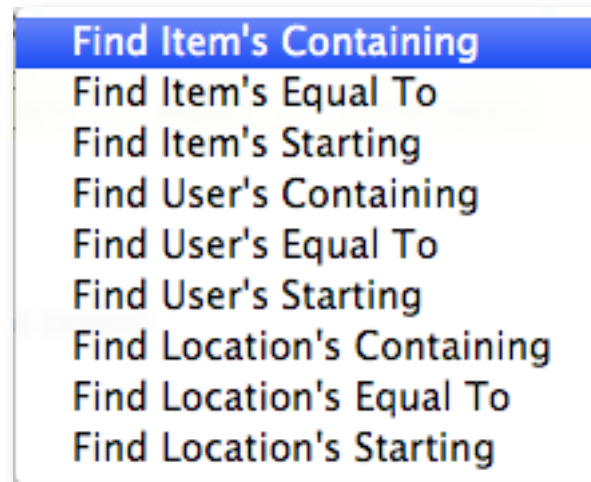


The find box is where you enter what you wish to search for, to the right of the box it shows you which find mode you are in at present ie Find Items's Starting, which finds all items starting with what you type in the box.

Typing in the box and pressing return will attempt to find what you are looking for, if there is more than one item that matches the criteria a list will be shown for you to choose from, if only one match is found you will be taken to the record for that item.

To change what is found see the section below.

The Find Options Menu



By clicking on the Magnifying Glass icon you will popup a menu with the find options.

Choose an option appropriate to what you wish to search for, the default is to find items starting with what you type.

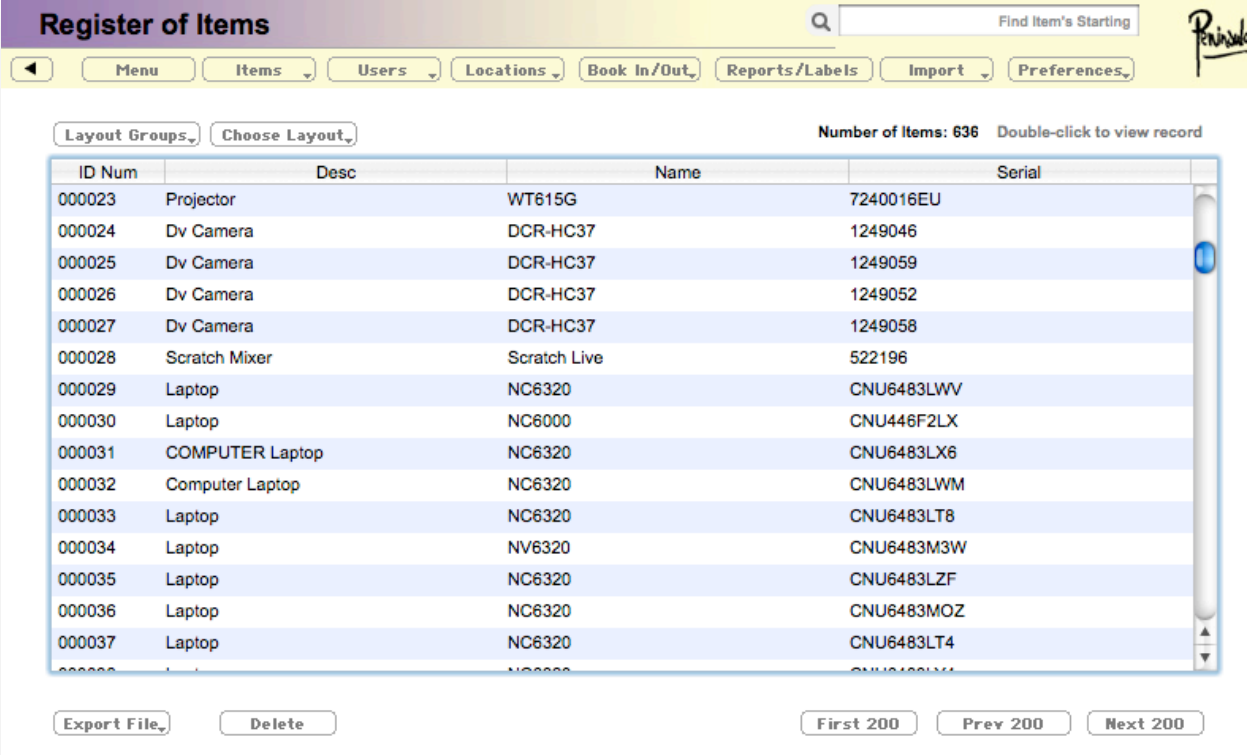
Using Lists

Quicktrack organises its data in lists for ease of access and reporting, there are default lists for Items, Users, Locations and Overdue Items.

From the list screen you can export the list to a csv (comma separated values) or tab (tab separated values) text file which can be imported into other applications such as Excel, Access or Filemaker if required.

Any report or label within Quicktrack can be shown as a list or exported to a csv or tab file from the reports screen, or chosen at the top of the list screen. Using the Layout Groups and Choose Layout popups at the top of the list.

The Item List



ID Num	Desc	Name	Serial
000023	Projector	WT615G	7240016EU
000024	Dv Camera	DCR-HC37	1249046
000025	Dv Camera	DCR-HC37	1249059
000026	Dv Camera	DCR-HC37	1249052
000027	Dv Camera	DCR-HC37	1249058
000028	Scratch Mixer	Scratch Live	522196
000029	Laptop	NC6320	CNU6483LWV
000030	Laptop	NC6000	CNU446F2LX
000031	COMPUTER Laptop	NC6320	CNU6483LX6
000032	Computer Laptop	NC6320	CNU6483LWM
000033	Laptop	NC6320	CNU6483LT8
000034	Laptop	NV6320	CNU6483M3W
000035	Laptop	NC6320	CNU6483LZF
000036	Laptop	NC6320	CNU6483MOZ
000037	Laptop	NC6320	CNU6483LT4

The item list contains a list of all the items in your current catalogue of items. This list may not be titled items depending on your personality settings.

You show the item list by choosing Item List from the Items popup on the screen.

You can sort the items by clicking on the headings at the top of the list, or go to an item by double clicking on it.

From here you can delete single or multiple items by selecting them and clicking delete, you can also export the list to a csv or tab delimited file for use in other applications by choosing the export file popup and choosing the format you require from the popup menu that appears.

The User List

The screenshot shows a web application titled "Register of Users". At the top, there is a search bar with the placeholder text "Find Item's Starting" and a logo on the right. Below the search bar is a navigation menu with buttons for "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". Under the "Users" button, there are sub-options: "Layout Groups", "Choose Layout", and "Number of Users: 1 Double-click to view record". The main area contains a table with the following columns: "ID Num", "First Name", "Last Name", and "Company". The table has one row with the data: "000056", "Guy", "Allensby", and an empty "Company" field. At the bottom of the window, there are buttons for "Export File", "Delete", "First 200", "Prev 200", and "Next 200".

ID Num	First Name	Last Name	Company
000056	Guy	Allensby	

The user list contains a list of all the users in your current catalogue of users. This list may not be titled users depending on your personality settings.

You show the user list by choosing User List from the Users popup on the screen.

You can sort the user by clicking on the headings at the top of the list, or go to a user by double clicking on them.

From here you can delete single or multiple users by selecting them and clicking delete, you can also export the list to a csv or tab delimited file for use in other applications by choosing the export file popup and choosing the format you require from the popup menu that appears.

The Location List

The screenshot displays the 'Register of Locations' window. At the top, there is a search bar with the placeholder text 'Find Item's Starting' and a magnifying glass icon. Below the search bar is a navigation menu with buttons for 'Menu', 'Items', 'Users', 'Locations', 'Book In/Out', 'Reports/Labels', 'Import', and 'Preferences'. The 'Locations' button is currently selected. Below the navigation menu, there are two buttons: 'Layout Groups' and 'Choose Layout'. To the right of these buttons is the text 'Double-click to view record'. The main area of the window contains a table with the following data:

ID Num	Name	Row	Shelf
000001	Warehouse1	11	12

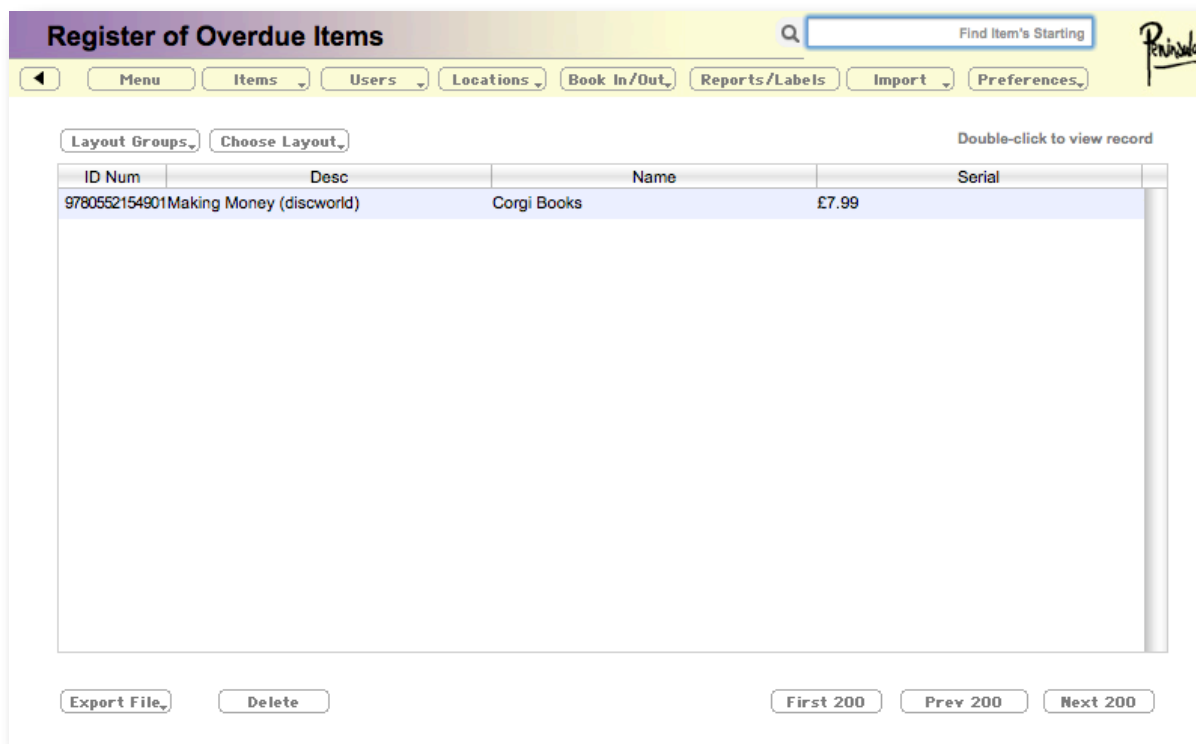
At the bottom of the window, there are three buttons: 'Export File', 'Delete', and a set of three buttons labeled 'First 200', 'Prev 200', and 'Next 200'.

The location list contains a list of all the locations in your current catalogue of locations. This list may not be titled locations depending on your personality settings.

You show the location list by choosing Location List from the Locations popup on the screen.

You can sort the locations by clicking on the headings at the top of the list, or go to a location by double clicking on them.

The Overdue Items List



ID Num	Desc	Name	Serial
9780552154901	Making Money (discworld)	Corgi Books	£7.99

The overdue items list contains a list of all the overdue items in your current catalogue of items. This list may not be titled overdue items depending on your personality settings.

You can sort the overdue items by clicking on the headings at the top of the list, or go to an item by double clicking on them.

From here you can also export the list to a csv or tab delimited file for use in other applications by choosing the export file popup and choosing the format you require from the popup menu that appears.

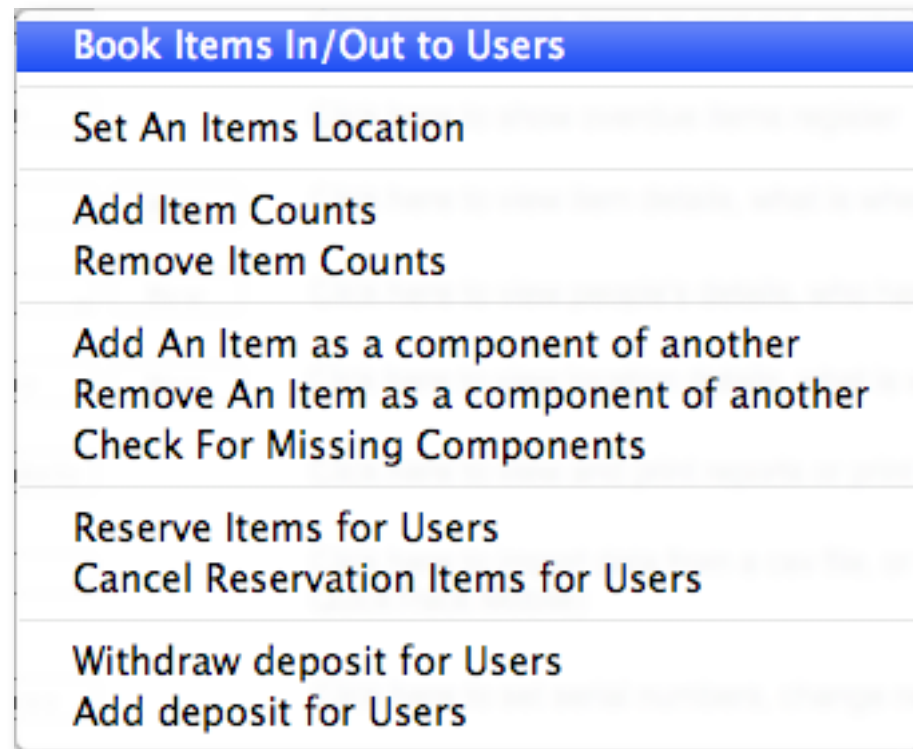
Booking In and Out Items or Dispatching Items

QuickTrack can be used to book items in and out to users as well as keeping track of locations and item counts, items can be reserved for later pickup all from the same menu.

The Booking Menu

Shown below is the Booking Menu, the first item may vary depending on your preferences, as it will say Books rather than items if you have a library personality set up. Also if you have setup a booking mode which allows separate in and out booking there will be two items at the top of the menu, one to select booking out and one to select booking in.

Below are the details of the various booking modes and other items in this menu.



Single Item Booking Mode

Click Booking Items then Book Out or Book In from the menu.

The screenshot shows a web application interface titled "Book In/Out". At the top, there is a navigation bar with a search icon and a "Find Item's Starting" input field. Below this is a menu bar with buttons for "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The main area contains three input fields: "User ID", "Item ID", and "Due Back". To the right of these fields is a grey box with instructions: "To Book Items In Or Out Type Or Scan The Numbers From The Item And User Into The Boxes To The Left" and "To Look Up Details In Database Press = After The ID Number To Alter The Return Date Tab To The Due Back Field". At the bottom, a grey bar displays "Transaction ID: 1".

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now booked out or in depending on your choices. if the item was booked out to a different user you will be warned by the software before booking back in.

You will then be taken back to the user id field to enter a new users id.

Single Item Separate Book Out Mode

Click Booking Items then Book Out from the menu.

Book Out

Find Item's Starting

Menu Items Users Locations Book In/Out Reports/Labels Import Preferences

User ID

Item ID

Due Back

To Book Items In Or Out
Type Or Scan The Numbers
From The Item And User
Into The Boxes To The Left

To Look Up Details In Database
Press = After The ID Number
To Alter The Return Date
Tab To The Due Back Field

Transaction ID: 1

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

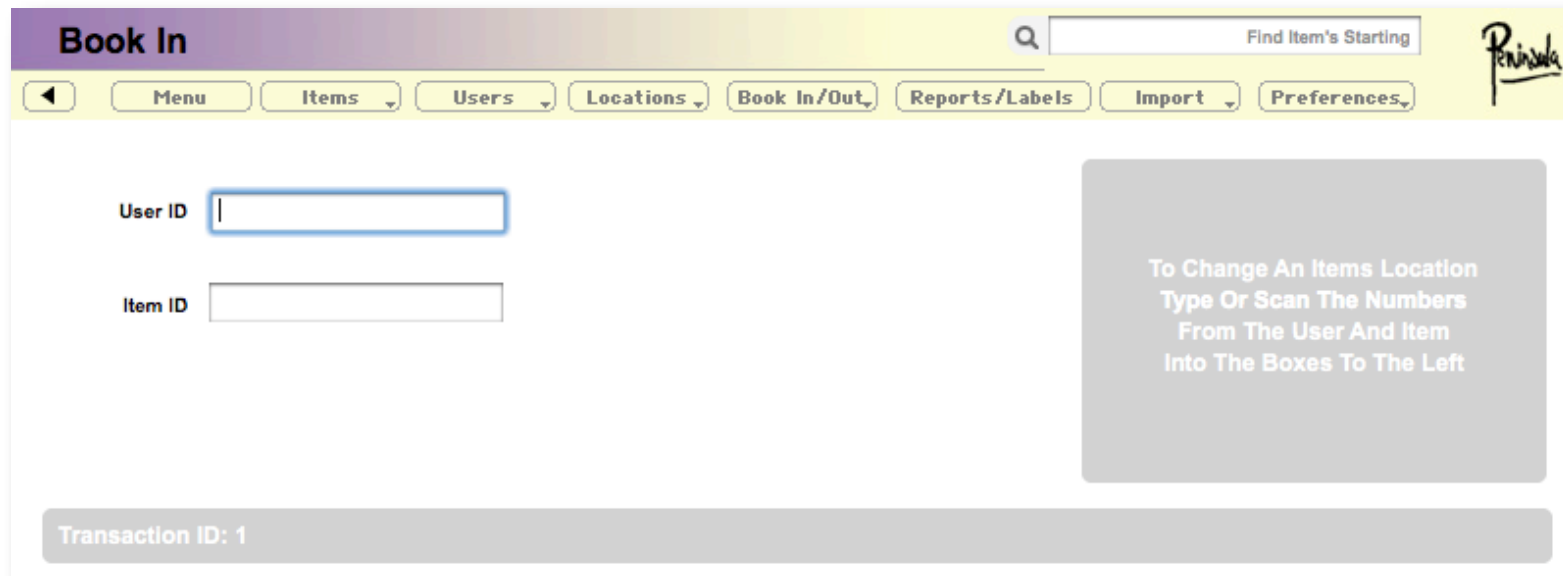
You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now booked out.

You will then be taken back to the user id field to enter a new users id.

Single Item Separate Book In Mode

Click Booking Items then Book In from the menu.



The screenshot shows the 'Book In' screen of the Peninsula software. At the top, there is a purple header with the text 'Book In'. To the right of the header is a search bar with a magnifying glass icon and the text 'Find Item's Starting'. Below the header is a yellow navigation bar with several buttons: 'Menu', 'Items', 'Users', 'Locations', 'Book In/Out', 'Reports/Labels', 'Import', and 'Preferences'. The 'Book In/Out' button is highlighted. The main area of the screen is white and contains two input fields: 'User ID' and 'Item ID'. The 'User ID' field is currently active, with a blue border and a cursor. To the right of these fields is a grey box with the text: 'To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left'. At the bottom of the screen, there is a grey bar with the text 'Transaction ID: 1'.

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

The return date will be shown, at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now in. if the item was booked out to a different user you will be warned by the software before booking back in.

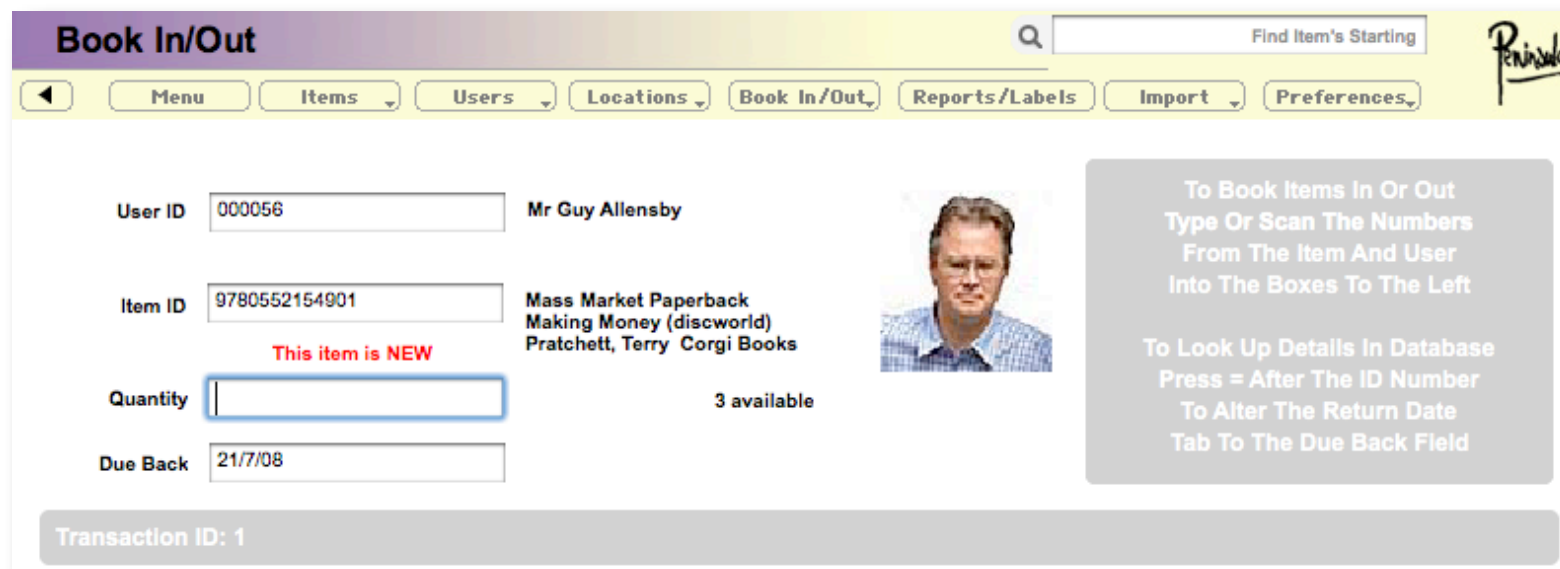
You will then be taken back to the user id field to enter a new users id.

Multiple Item Booking Mode

If Book Multiples Of Items has been selected in the preferences (not available in the Library version as it confuses booking of multiples of the same book), operation of booking in and out is slightly different.

This is not the same as booking out more than one item to the same user, this is known as Dispatch Mode and is discussed later.

The screen is shown below.



The screenshot shows the 'Book In/Out' web interface. At the top, there is a navigation bar with a search icon and a search box labeled 'Find Item's Starting'. Below the navigation bar are several tabs: Menu, Items, Users, Locations, Book In/Out, Reports/Labels, Import, and Preferences. The main content area displays the following information:

- User ID:** 000056, **Mr Guy Allensby**
- Item ID:** 9780552154901, **Mass Market Paperback Making Money (discworld) Pratchett, Terry Corgi Books**
- Quantity:** A text input field with a blue border, and **3 available** next to it.
- Due Back:** 21/7/08

A red text label **This item is NEW** is positioned above the quantity field. To the right of the item details is a small portrait photo of Mr Guy Allensby. A grey box on the right contains instructions: 'To Book Items In Or Out Type Or Scan The Numbers From The Item And User Into The Boxes To The Left' and 'To Look Up Details In Database Press = After The ID Number To Alter The Return Date Tab To The Due Back Field'. At the bottom, a grey bar displays 'Transaction ID: 1'.

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

If an item has more than one unit in stock, or previously in stock, a quantity field will show with the quantity available next to it. To book out an item type - and then the quantity to book out (if you are in separate booking in and out you do not need the minus sign). Press return.

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now booked out or in depending on your choices. if the item was booked out to a different user you will be warned by the software before booking back in.

You will then be taken back to the user id field to enter a new users id.

Multiple Item Separate Book Out Mode

Click Booking Items then Book Out from the menu.

Book Out

Find Item's Starting

Menu Items Users Locations Book In/Out Reports/Labels Import Preferences

User ID 000056 Mr Guy Allensby

Item ID 9780552154901 Mass Market Paperback Making Money (discworld) Pratchett, Terry Corgi Books

This item is NEW

Quantity 3 available

Due Back 21/7/08

Transaction ID: 1

To Book Items In Or Out
Type Or Scan The Numbers
From The Item And User
Into The Boxes To The Left

To Look Up Details In Database
Press = After The ID Number
To Alter The Return Date
Tab To The Due Back Field

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

If an item has more than one unit in stock, or previously in stock, a quantity field will show with the quantity available next to it. To book out an item type the quantity to book out. Press return.

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now booked out.

You will then be taken back to the user id field to enter a new users id.

Mutliple Item Separate Book In Mode

Click Booking Items then Book In from the menu.

Book In Find Item's Starting

Menu Items Users Locations Book In/Out Reports/Labels Import Preferences

User ID 000056 Mr Guy Allensby

Item ID 9780552154901 Mass Market Paperback Making Money (discworld) Pratchett, Terry Corgi Books

This item is NEW

Quantity 3 available

To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left

Transaction ID: 1

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return.

If an item has more than one unit in stock, or previously in stock, a quantity field will show with the quantity available next to it. To book out an item type the quantity to book out. Press return.

The return date will be shown, at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now in depending on your choices. if the item was booked out to a different user you will be warned by the software before booking back in.

You will then be taken back to the user id field to enter a new users id.

Dispatch Booking Modes

Dispatch booking is when you book more than one separate item to the same user at the same time, ie in a Library or Toolroom when a complete list of items is booked out at once to the same person.

QuickTrack provides a mode for booking in and out multiple items to one user also (optionally) printing out a dispatch note or receipt.

There is a automatic book in/out dispatch mode and also separate ones as well. Choose the mode most appropriate to your situation.

Operation in these modes is the same as in standard mode, with one difference, once you are booking items to a user, the cursor will return to the item id field and not the user id field, until either **** is typed into the item id field or the end dispatch barcode is scanned.

Single Item Dispatch Booking Mode

Click Booking Items then Book Out or Book In from the menu.

The screenshot shows a web application interface titled "Book In/Out". At the top, there is a navigation bar with a search icon and a "Find Item's Starting" input field. Below this is a menu bar with buttons for "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The main content area contains three input fields: "User ID", "Item ID", and "Due Back". To the right of these fields is a grey box with instructions: "To Book Items In Or Out Type Or Scan The Numbers From The Item And User Into The Boxes To The Left" and "To Look Up Details In Database Press = After The ID Number To Alter The Return Date Tab To The Due Back Field". At the bottom, a grey bar displays "Transaction ID: 1".

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now booked out or in depending on your choices. if the item was booked out to a different user you will be warned by the software before booking back in.

You will be taken back to the item id field to allow you to book out or in more items to the same user.

This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Single Item Dispatch Separate Book Out Mode

Click Booking Items then Book Out from the menu.

Book Out

Find Item's Starting

Menu Items Users Locations Book In/Out Reports/Labels Import Preferences

User ID

Item ID

Due Back

Transaction ID: 1

To Book Items In Or Out
Type Or Scan The Numbers
From The Item And User
Into The Boxes To The Left

To Look Up Details In Database
Press = After The ID Number
To Alter The Return Date
Tab To The Due Back Field

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

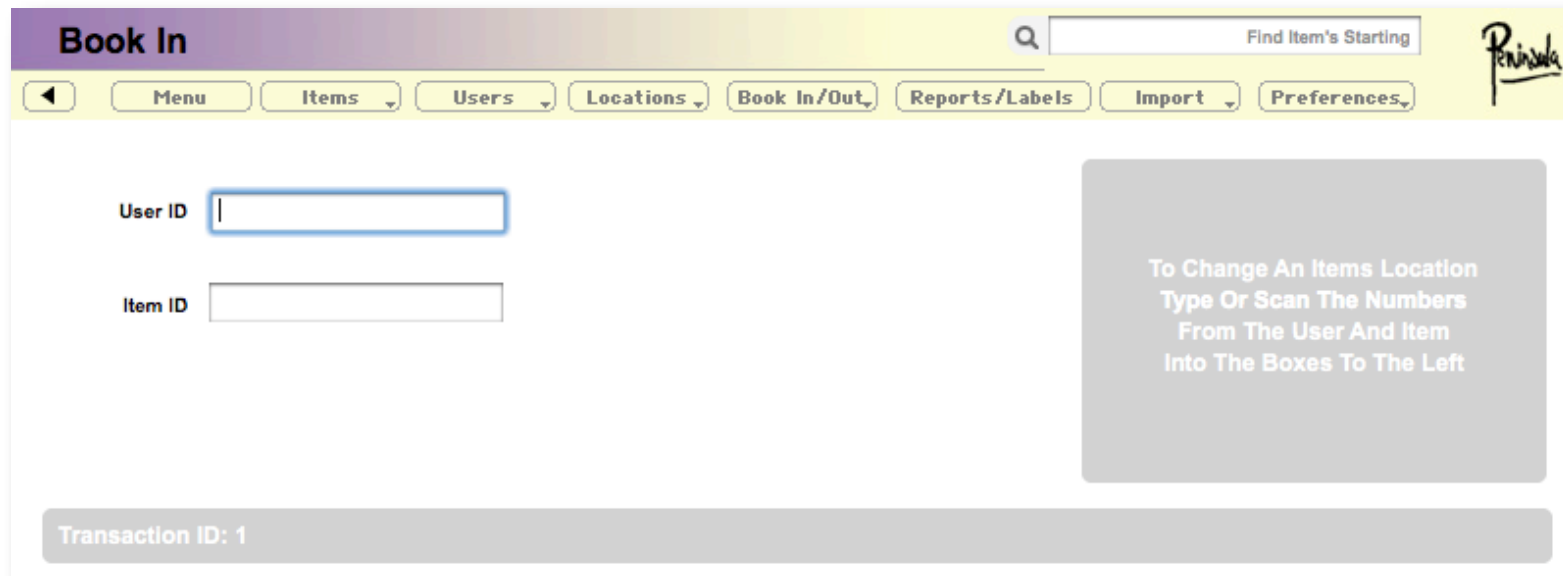
The item is now booked out.

You will be taken back to the item id field to allow you to book out more items to the same user.

This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Single Item Dispatch Separate Book In Mode

Click Booking Items then Book In from the menu.



The screenshot shows the 'Book In' screen of the Peninsula system. At the top, there is a purple header with the text 'Book In'. To the right of the header is a search bar with a magnifying glass icon and the text 'Find Item's Starting'. Below the header is a yellow navigation bar with several buttons: 'Menu', 'Items', 'Users', 'Locations', 'Book In/Out', 'Reports/Labels', 'Import', and 'Preferences'. The main area of the screen is white and contains two input fields: 'User ID' and 'Item ID'. To the right of these fields is a grey box with the text: 'To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left'. At the bottom of the screen, there is a grey bar with the text 'Transaction ID: 1'.

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

The return date will be shown, at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now in. if the item was booked out to a different user you will be warned by the software before booking back in.

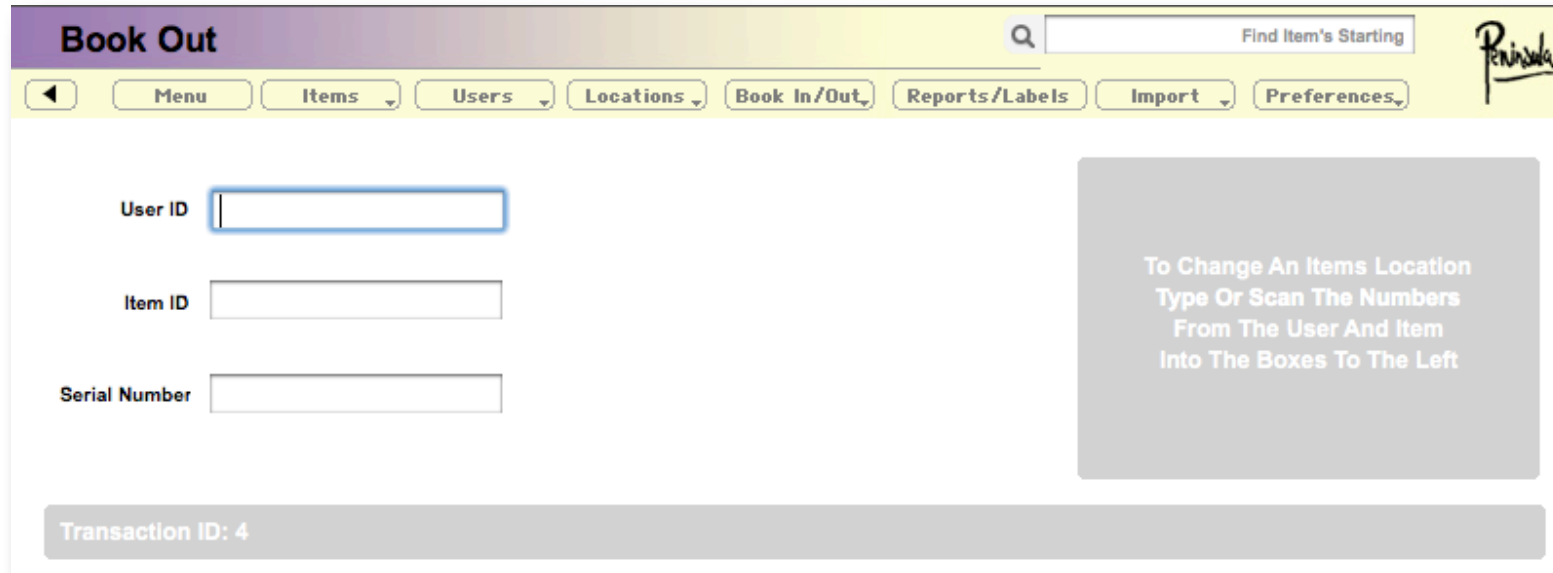
You will be taken back to the item id field to allow you to book in more items to the same user.

This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Single Item Dispatch Serial Number Book Out Mode

In this mode book multiple items in the preferences MUST be turned off and no due back date is given.

Click Booking Items then Book Out from the menu.



The screenshot shows the 'Book Out' interface. At the top, there is a purple header with the title 'Book Out' and a search bar with the placeholder 'Find Item's Starting'. Below the header is a navigation bar with buttons: Menu, Items (with a dropdown arrow), Users (with a dropdown arrow), Locations (with a dropdown arrow), Book In/Out (with a dropdown arrow), Reports/Labels, Import (with a dropdown arrow), and Preferences (with a dropdown arrow). The main area contains three input fields: 'User ID' (highlighted with a blue border), 'Item ID', and 'Serial Number'. To the right of these fields is a grey box with the text: 'To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left'. At the bottom, there is a grey bar displaying 'Transaction ID: 4'. The Peninsula logo is in the top right corner.

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

Scan or type a Serial Number then press return

The item is now booked out.

You will be taken back to the item id field to allow you to book out more items to the same user.

This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Single Item Dispatch Serial Number Book In Mode

In this mode book multiple items in the preferences MUST be turned off and no due back date is given.

Click Booking Items then Book In from the menu.

The screenshot shows a web application interface titled "Book In". At the top, there is a navigation menu with buttons: Menu, Items, Users, Locations, Book In/Out, Reports/Labels, Import, and Preferences. A search bar with a magnifying glass icon and the text "Find Item's Starting" is located to the right of the menu. Below the menu, there are three input fields: "User ID", "Item ID", and "Serial Number". To the right of these fields is a grey box containing the text: "To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left". At the bottom of the interface, a grey bar displays "Transaction ID: 4".

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

Scan or type a Serial Number then press return

The item is now in. if the item was booked out to a different user you will be warned by the software before booking back in.

You will be taken back to the item id field to allow you to book in more items to the same user.

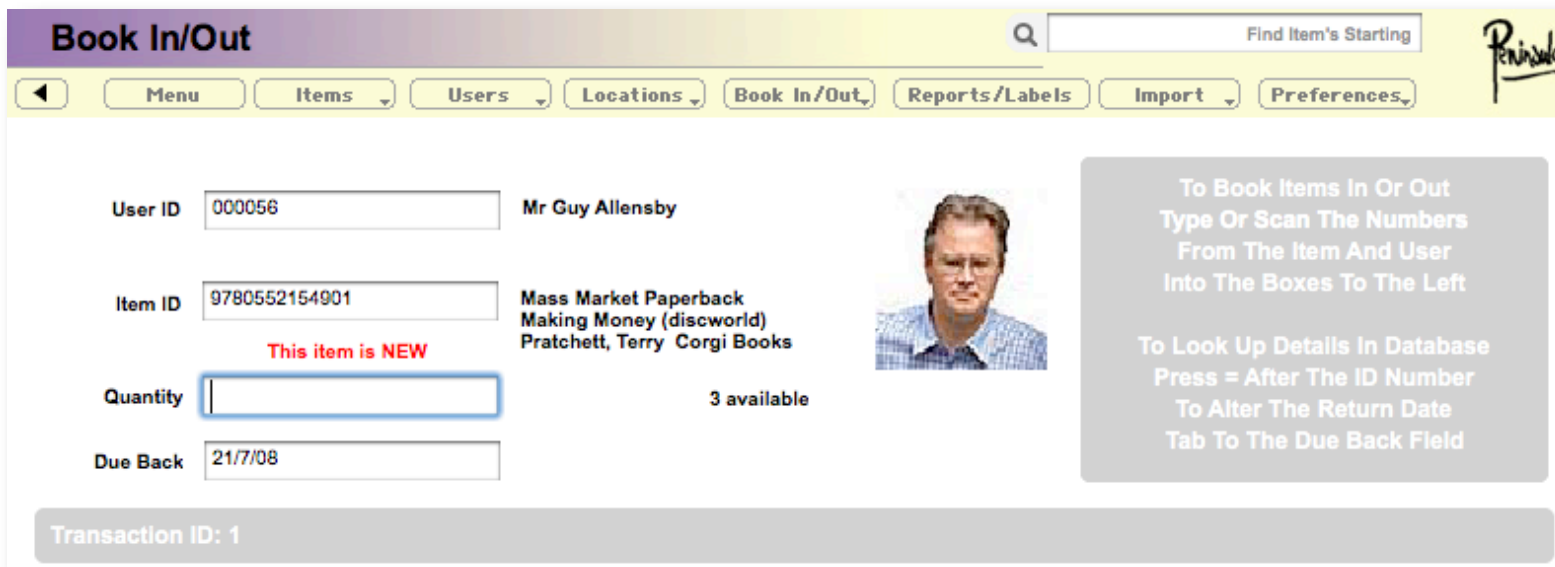
This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Multiple Item Dispatch Booking Mode

If Book Multiples Of Items has been selected in the preferences (not available in the Library version as it confuses booking of multiples of the same book), operation of booking in and out is slightly different.

This is not the same as booking out more than one item to the same user, this is known as Dispatch Mode and is discussed later.

The screen is shown below.



The screenshot shows the 'Book In/Out' web interface. At the top, there is a purple header with the title 'Book In/Out' and a search bar. Below the header is a navigation menu with buttons for Menu, Items, Users, Locations, Book In/Out, Reports/Labels, Import, and Preferences. The main content area displays the following information:

- User ID:** 000056, **Mr Guy Allensby**
- Item ID:** 9780552154901, **Mass Market Paperback Making Money (discworld) Pratchett, Terry Corgi Books**
- Quantity:** A text input field with a blue border, and **3 available** next to it.
- Due Back:** 21/7/08

A red text label 'This item is NEW' is positioned above the quantity field. To the right of the item details is a small portrait photo of Mr. Guy Allensby. On the far right, there is a grey box with instructions: 'To Book Items In Or Out Type Or Scan The Numbers From The Item And User Into The Boxes To The Left' and 'To Look Up Details In Database Press = After The ID Number To Alter The Return Date Tab To The Due Back Field'. At the bottom, a grey bar displays 'Transaction ID: 1'.

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

If an item has more than one unit in stock, or previously in stock, a quantity field will show with the quantity available next to it. To book out an item type - and then the quantity to book out (if you are in separate booking in and out you do not need the minus sign). Press return.

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now booked out or in depending on your choices. if the item was booked out to a different user you will be warned by the software before booking back in.

You will be taken back to the item id field to allow you to book in our out more items to the same user.

This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Multiple Item Dispatch Separate Book Out Mode

Click Booking Items then Book Out from the menu.

Book Out Find Item's Starting

Menu Items Users Locations Book In/Out Reports/Labels Import Preferences

User ID 000056 Mr Guy Allensby

Item ID 9780552154901 Mass Market Paperback Making Money (discworld) Pratchett, Terry Corgi Books

This item is NEW

Quantity 3 available

Due Back 21/7/08

Transaction ID: 1

To Book Items In Or Out Type Or Scan The Numbers From The Item And User Into The Boxes To The Left

To Look Up Details In Database Press = After The ID Number To Alter The Return Date Tab To The Due Back Field

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return

If an item has more than one unit in stock, or previously in stock, a quantity field will show with the quantity available next to it. To book out an item type the quantity to book out. Press return.

An automatic return date will be entered, either change by tabbing to the field or leave this and then press return

You can also at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now booked out.

You will be taken back to the item id field to allow you to book out more items to the same user.

This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Mutliple Item Dispatch Separate Book In Mode

Click Booking Items then Book In from the menu.

The screenshot shows the 'Book In' interface. At the top, there is a purple header with the text 'Book In' and a search bar with the placeholder 'Find Item's Starting'. Below the header is a navigation bar with buttons: Menu, Items, Users, Locations, Book In/Out, Reports/Labels, Import, and Preferences. The main area contains the following fields and information:

- User ID: 000056, Mr Guy Allensby
- Item ID: 9780552154901, Mass Market Paperback, Making Money (discworld), Pratchett, Terry Corgi Books
- Quantity: [input field], 3 available
- A red text label: 'This item is NEW'
- A small portrait photo of a man.
- A grey box with text: 'To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left'
- A grey bar at the bottom with the text: 'Transaction ID: 1'

Scan or Type in the User ID press return, if the user has a picture set in the record the picture will be shown to verify identity.

Scan or Type in the Item ID press return.

If an item has more than one unit in stock, or previously in stock, a quantity field will show with the quantity available next to it. To book out an item type the quantity to book out. Press return.

The return date will be shown, at this stage extend the due back date in the last stage by tabbing to the Due Back Field and entering a new due back date, then press return and QuickTrack will ask if you wish to extend the due back date, click OK or Yes to continue or No or Cancel to Cancel.

The item is now in. if the item was booked out to a different user you will be warned by the software before booking back in.

You will be taken back to the item id field to allow you to book out more items to the same user.

This will continue until you have finished the items to book and ended this users dispatch by typing **** or scan the End Dispatch Mode barcode into the item id box.

Timekeeper Modes

Quicktrack has the ability to track time for use in tracking a person or item entering and leaving a single location.

If you wish to track people entering and leaving a location you should use a personality which allocates the item database as a User database, contact us if you have a problem.

There are three modes for this function.

Timekeeper No Book In



The screenshot shows the 'Book In/Out' interface. At the top, there is a purple header with the title 'Book In/Out'. Below the header is a navigation bar with buttons for 'Menu', 'Items', 'Users', 'Locations', 'Book In/Out', 'Reports/Labels', 'Import', and 'Preferences'. A search bar with a magnifying glass icon and the text 'Find Item's Starting' is located to the right of the navigation bar. The main area contains an 'Item ID' label next to a text input field. To the right of the input field is a grey box with the text: 'To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left'. At the bottom, there is a grey bar displaying 'Transaction ID: 4'.

In this mode the item or person is simply booked in and the time of entry (or exit) logged to the database.

In this way you can track attendance but without a time limitation.

Timekeeper Book In Out

In this mode the item or person is booked both in and out of the location and the time of entry and exit is logged to the database.

This way you can keep both time and attendance data in a single location.

Location Manager (No Book In)

The screenshot shows the 'Book In/Out' web application interface. At the top, there is a purple header with the title 'Book In/Out'. To the right of the title is a search bar with a magnifying glass icon and the text 'Find Item's Starting'. Below the header is a yellow navigation bar with several buttons: a back arrow, 'Menu', 'Items' (with a dropdown arrow), 'Users' (with a dropdown arrow), 'Locations' (with a dropdown arrow), 'Book In/Out' (with a dropdown arrow), 'Reports/Labels', 'Import' (with a dropdown arrow), and 'Preferences' (with a dropdown arrow). On the far right of the navigation bar is a logo that says 'Peninsula'. The main content area has a white background. On the left, there are two input fields: 'User ID' with a blue border and 'Item ID' with a grey border. On the right, there is a grey box with the text: 'To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left'. At the bottom, there is a grey bar with the text 'Transaction ID: 4'.

This mode enables you to keep track of attendance at a specific location, for example a lecture.

In this mode the location and the ID is recorded with a time in order to check attendance at a specific time in a specific location.

Set An Items Location

This menu option allows you to set an items location without going to the item specific record.



The screenshot shows a web application interface titled "Set An Items Location". At the top, there is a navigation bar with a search icon and a text input field labeled "Find Item's Starting". Below the navigation bar is a menu bar with buttons for "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The main content area contains two input fields: "Location ID" and "Item ID". To the right of these fields is a grey box with the text: "To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left".

Scan or type the location id and press return.

Then scan or type the item id and press return.

The Items location will be set to the new location.

Item Counts

Items can have the multiple count updated in one upload from a file in order to quickly add new stock to the system.

Add Item Counts

This menu option adds counts for each item in a list to the existing multiples of items.

Selecting this will prompt you for a text file with the item counts in them.

The file is formatted as an item id a comma and then an option count for the item.

If the count is missing then a quantity of one unit will be assumed.

Remove Item Counts

This menu option removes (subtracts) counts for each item in a list to the existing multiples of items.

Selecting this will prompt you for a text file with the item counts in them.

The file is formatted as an item id a comma and then an option count for the item.

If the count is missing then a quantity of one unit will be assumed.

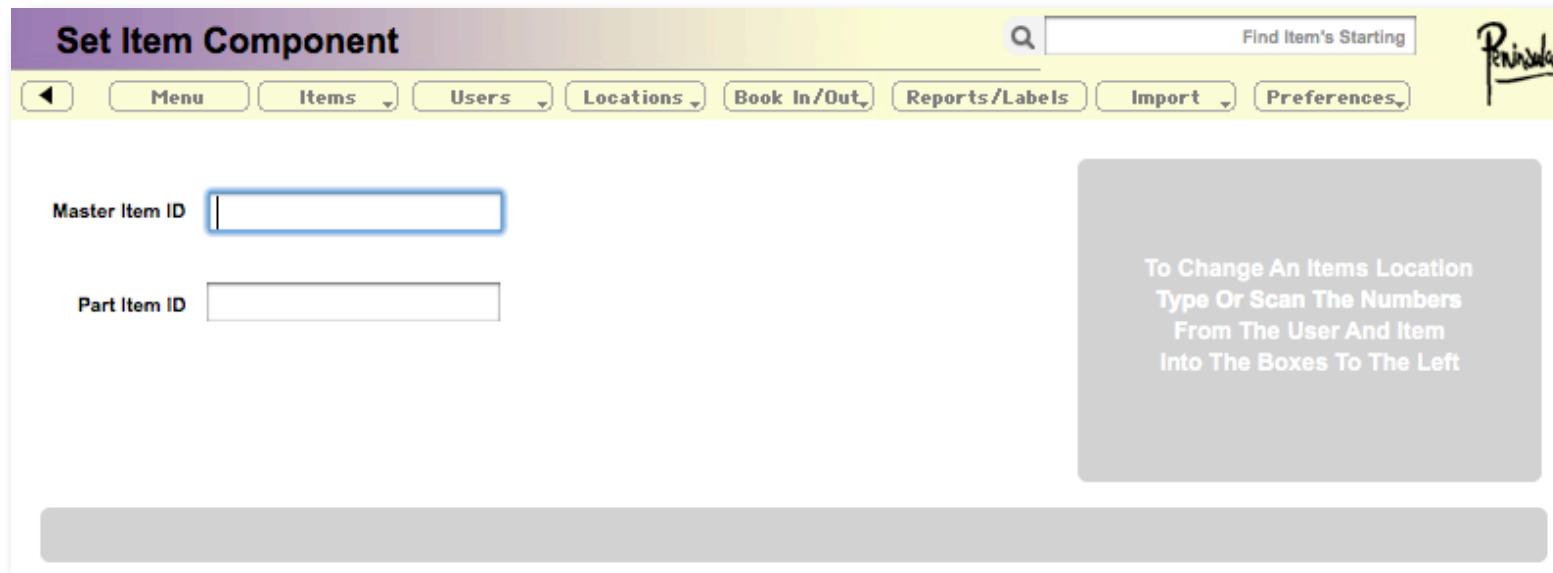
Components

Items can be subdivided to have a master component ie a box and sub components of this master component ie the boxes contents. This is useful where you have sets of items and need to check that all components are in an item when booked out or returned.

Any item can be a master item or a component, and as such a master item can be a component of another item if required.

Setting An Items Components

Choose Set Item Components from the Book In/Out menu.



The screenshot shows a web application titled "Set Item Component". At the top, there is a navigation bar with a search box labeled "Find Item's Starting" and a "Peninsula" logo. Below the navigation bar is a menu with buttons for "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The main content area has two input fields: "Master Item ID" and "Part Item ID". A grey box on the right contains the text: "To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left".

Type or scan a Master Item ID into the top box and press return.

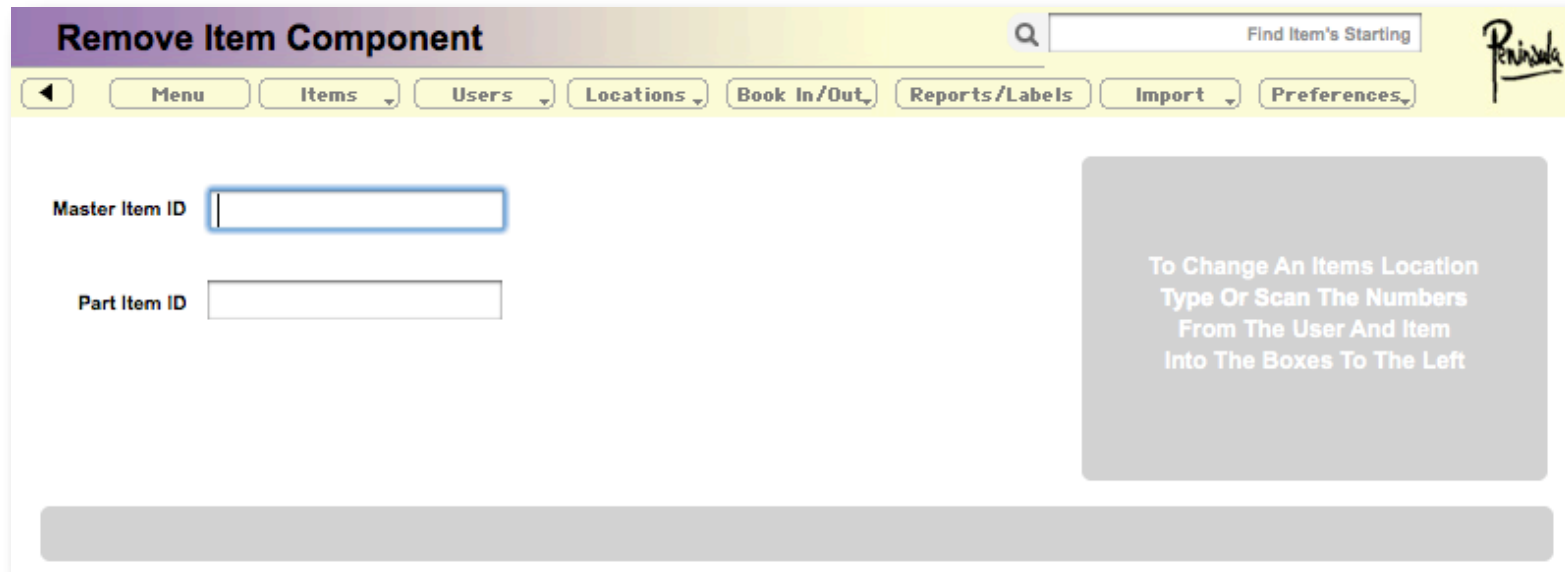
Then type or scan a Part Item ID (The component) into the box below and press return.

The components is then added to the master item.

Removing An Items Components

You can also remove components from a master item as required.

Choose Remove Item Components from the Book In/Out menu.



The screenshot shows a web application interface titled "Remove Item Component". At the top, there is a navigation bar with a search icon and a text input field labeled "Find Item's Starting". Below the navigation bar is a menu bar with buttons for "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The main content area has two input fields: "Master Item ID" and "Part Item ID". To the right of these fields is a grey box with the text: "To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left". At the bottom of the main content area is a large grey button.

Type or scan a Master Item ID into the top box and press return.

Then type or scan a Part Item ID (The component) into the box below and press return.

The components is then removed from the master item.

Checking An Items Components

Choose Check for missing components from the Book In/Out menu.

A dialog box will appear prompting for a text file.

The text file should be formatted as follows.

Master Item ID

Component1

Component2

etc

Master Item ID (again to end the item)

Master Item ID (to start the next one)

Component1

Component2

etc

Master Item ID (again to end the item)

etc

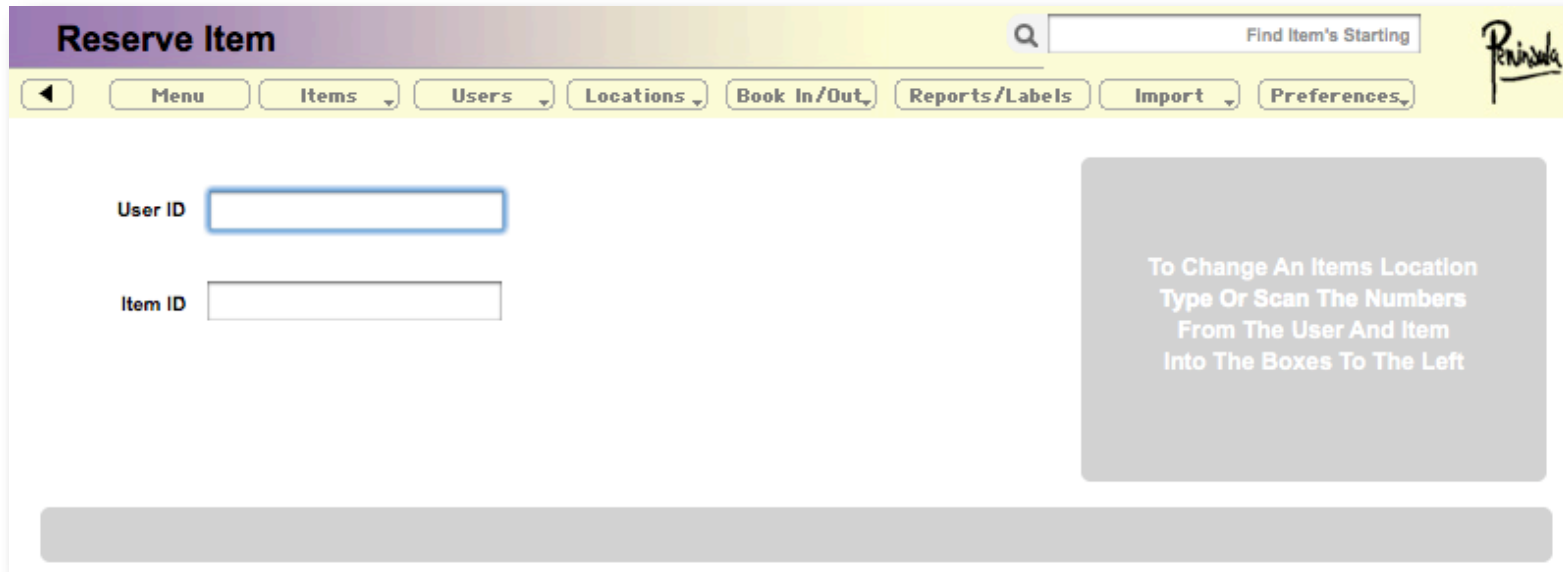
This file will then be processed and a missing components report produced, which can be shown on screen, exported or printed.

Reservations

Items can be reserved for later pickup, which is useful if an item is already booked out to another user.

Add A Reservation

To add a reservation choose Reserve Items For Users from the Book In/Out menu.



The screenshot shows a web application titled "Reserve Item". At the top, there is a navigation bar with a search icon and a text input field labeled "Find Item's Starting". Below the navigation bar is a menu with several options: "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The "Book In/Out" option is highlighted. The main content area contains two input fields: "User ID" and "Item ID". To the right of these fields is a grey box with the text: "To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left".

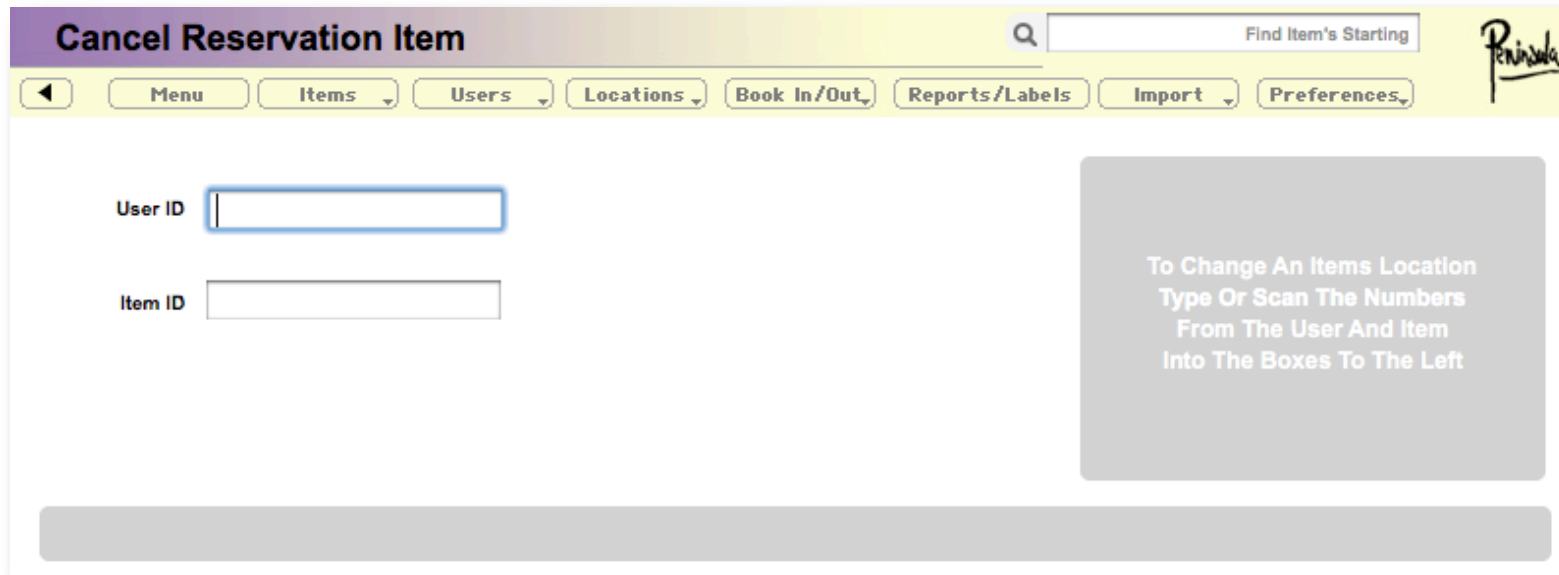
Type or scan the User ID and press return.

Type or scan the Item ID and press return.

The item is now reserved for the user.

Cancel A Reservation

To cancel a reservation choose Cancel Reservation Items For Users from the Book In/Out menu.



The screenshot shows a web application titled "Cancel Reservation Item". At the top, there is a navigation bar with a search box labeled "Find Item's Starting" and a logo for "Peninsula". Below the navigation bar is a menu with buttons: "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The "Book In/Out" button is highlighted. The main content area has two input fields: "User ID" and "Item ID". To the right of these fields is a grey box with the text: "To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left". At the bottom of the main content area is a long grey bar.

Type or scan the User ID and press return.

Type or scan the Item ID and press return.

The item is now no longer reserved for the user.

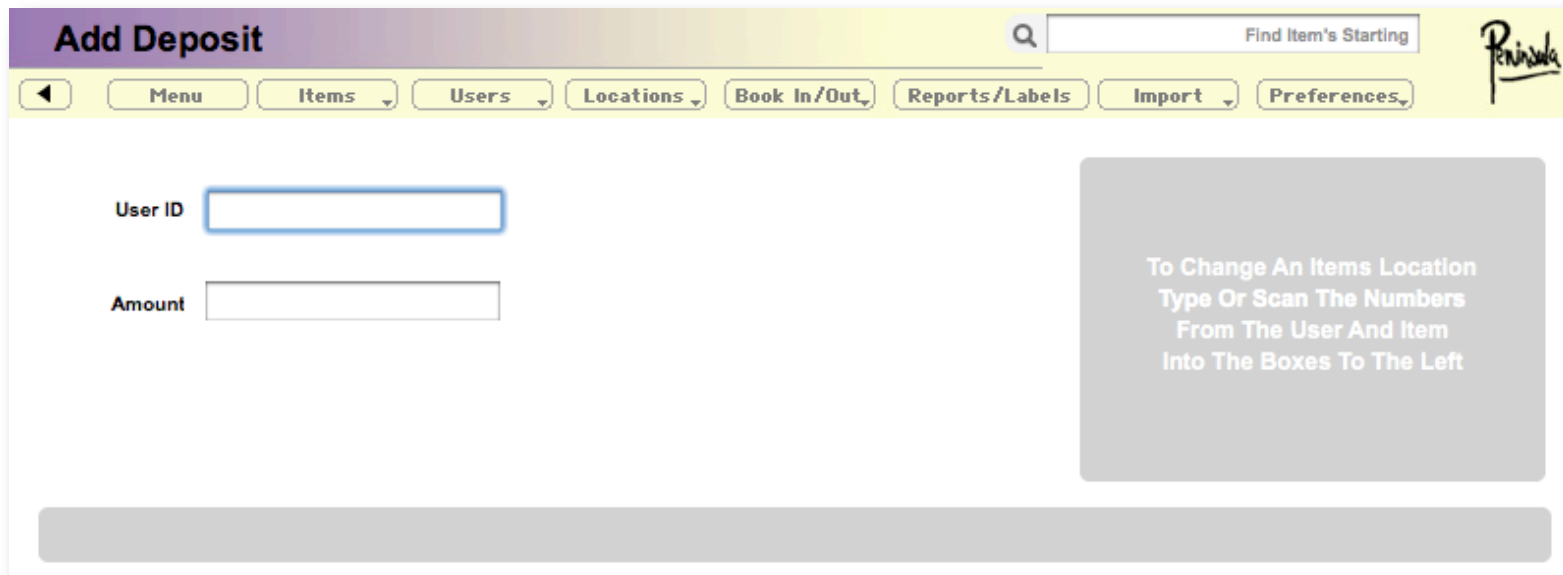
Deposits

All users can have a deposit added to their user details, this can either be as a sum of money for later allocation to the user in parts ie as a bank system, or as a deposit for the item they are borrowing, in which case the entire deposit would be returned when the item is returned.

If you wish to only operate a banking system where a deposit is held and released in parts to a user you may be better using Quicktrack Moneybox rather than the standard Quicktrack as this is specifically designed for this purpose. This is particularly useful for school or colleges when dealing with pocket money as an accurate log of the money can be held.

Adding Deposits

To add a deposit to a users account choose Add Deposit For Users from the Book In/Out popup menu.



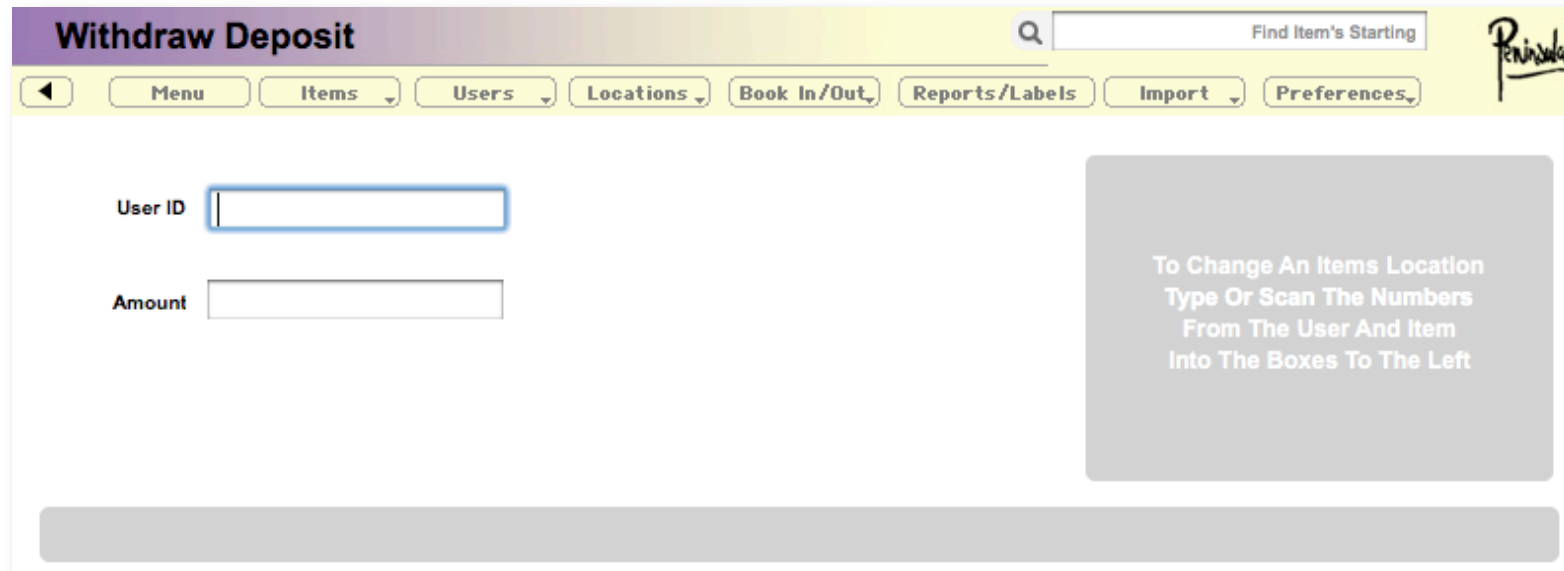
The screenshot shows the 'Add Deposit' form in the Quicktrack system. The form has a yellow header bar with the title 'Add Deposit' on the left and a search bar on the right labeled 'Find Item's Starting'. Below the header is a navigation bar with buttons for 'Menu', 'Items', 'Users', 'Locations', 'Book In/Out', 'Reports/Labels', 'Import', and 'Preferences'. The main form area has two input fields: 'User ID' and 'Amount'. To the right of these fields is a grey box with the text: 'To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left'. At the bottom of the form is a grey bar.

Type or scan the User ID into the top field and press return.

Then type or scan the deposit amount into the bottom box and press return, the deposit will then be added to the users account.

Withdrawing Deposits

To withdraw an amount from a users account choose Withdraw Deposit For Users from the Book In/Out popup menu.



The screenshot shows a web application titled "Withdraw Deposit". At the top, there is a search bar with a magnifying glass icon and the text "Find Item's Starting". Below the search bar is a navigation menu with buttons: "Menu", "Items", "Users", "Locations", "Book In/Out", "Reports/Labels", "Import", and "Preferences". The "Book In/Out" button is highlighted. On the right side of the header, there is a logo that says "Peninsula". The main content area has two input fields: "User ID" and "Amount". The "User ID" field is currently selected with a blue border. To the right of these fields is a grey box containing the text: "To Change An Items Location Type Or Scan The Numbers From The User And Item Into The Boxes To The Left". At the bottom of the form, there is a long grey button.

Type or scan the User ID into the top field and press return.

Then type or scan the deposit amount into the bottom box and press return, the deposit will then be removed from the users account if they have sufficient funds on deposit.

Reports and Labels

In Quicktrack reports and labels are dealt with in the same way, one line of a report is equivalent to a single label.

All reports and labelled can be viewed on screen, presented as a list or printed to a printer.

There are many reports and labels already incorporated into Quicktrack, they can be sub divided into named folders to make them easier to manage.

New reports and labels can be added in a number of ways, the quickest route being to make a Quickreport which asks a few questions and automatically makes a new report from the information.

Viewing or Printing a Report or Label

Click Reports and Labels to go to the report and label screen.

The screenshot shows the 'Reports' window in Quicktrack. At the top, there's a purple header with the title 'Reports' and a search bar labeled 'Find Item's Starting'. Below the header is a navigation bar with buttons: Menu, Items, Users, Locations, Book In/Out, Reports/Labels (highlighted), Import, and Preferences. Under the navigation bar, there's a section for 'Layout Groups' with a 'Choose Layout' button and the text '65 (7551) Barcode Serial Number'. To the right of this are 'Edit', 'View', and 'Print' buttons. Below this, there are input fields for 'Start at Item Across' (set to 1), 'Down' (set to 1), 'Repeat Each' (set to 1) Times, 'Start Serial Num', and 'End Serial Num'. The main area of the window is a large rectangle containing a barcode with the number '000000' below it. At the bottom of the window, there's a grey bar with the text: 'Choose a Layout Group and then Choose a Layout from the menus at the top of the window'.

All report and labels are viewable on this screen, they can also be printed from here or displayed as a list which can either be used as is or the data exported to a csv or tab delimited file.

Choosing a Report or Label

First select a layout group from the Layout Groups popup menu towards the top left of the window.

This selects the subsection of layouts that you can access, some layouts are in the top level Reports and are not in subsections.

Then select the layout you require from the Choose Layout popup menu to the right of the Layout Groups popup menu.

The chosen layout will then appear on screen.

Optional Information In Reports

Some layouts have optional information which can be changed by yourself. This allows the entry of serial numbers, specific record ids etc.

If this is the case a number of optional item boxes with descriptions will appear toward the top right of the window.

A screenshot of a software interface showing two input fields. The first field is labeled 'Start Serial Num' and the second field is labeled 'End Serial Num'. Both fields are empty and have a light blue border. The labels are in a bold, black font.

In order to display the report correctly enter the details required, in this example you may have a start number of 1 and an end number of 100 for example. The report will then be changed to reflect this when you press return in the last box.

Your report or label can be scrolled on screen using the scroll bar to the right hand side of the window.

Printing Reports and Labels

In order to print the layout you have chosen, select the Print popup menu and then choose Page Setup, choose the correct page settings for the paper or labels you are to print onto.

Then select the print popup again and Print To Standard printer to send the layout to your printer.

Starting At Another Point or Repeating Records

Quicktrack can start printing labels part way down a sheet, in order to do this type a number into the Start at item across and Down boxes to move the printed start around the sheet. This is particularly useful if you have part used sheets of labels.

Also in this section there is a facility to repeat labels or records, in order to get more than one copy of a label. Enter the number of times to repeat the label into the Repeat Each box and the label will be repeated that many times for each label or record.

Viewing A Report As A List

Choose the View As List item from the View popup menu to view the data from your report or label as a list.

Exporting A Report As A CSV File

Choose the Export As CSV item from the View popup menu to export the data to a comma separated (CSV) file.

Changing the Page Margins

Sometimes it may be needed to move the labels or report around on the page, you can do this by changing the page margins.

Choose Adjust Margins from the Edit popup menu, then enter a top and left value in the fields provided.

Editing A Layouts Size Options

Choose a layout using the Layout Groups and Choose Layout popup menus, then choose Edit Size from the Edit popup menu. A dialog will appear allowing you to edit the layout size and options.

Setting A Default Layout

To make a layout automatically show when the Report screen is selected, choose a layout using the Layout Groups and Choose Layout popup menus, then choose Set Default Layout from the Edit popup menu.

Creating A New Report Or Label

Choose Create Or Edit A Quick Report from the Edit Popup menu on the Reports screen.

The screenshot shows the 'QuickReport Editor' window. At the top is a menu bar with options: Menu, Items, Users, Locations, Book In/Out, Reports/Labels, Import, and Preferences. A search bar labeled 'Find Item's Starting' is on the right. The main area contains 11 numbered steps for creating a report. Step 1: 'Select the database to make report from' with a dropdown menu showing 'Items'. Step 2: 'You must now map your report to the fields in the database.' It includes instructions on using '<<' and '>>' buttons to move fields between the 'QuickTrack Fields' list and the 'Report Fields' list. Step 3: 'Set The Page Size (mm)' with input fields for Width (210) and Height (297). Step 4: 'Set The Page Margins (mm)' with input fields for Left (10), Top (10), Bottom (10), and Right (10). Step 5: 'Set the number of rows in the report' with input fields for Rows (20) and Height (10). Step 6: 'Set the number of columns in the report' with input fields for Columns (1) and Width (210). Step 7: 'Arrange Fields, (allows you to make labels)' with a dropdown menu showing 'Across'. Step 8: 'Choose a field to be a Barcode if needed' with a dropdown menu and a Height input field (10). Step 9: 'Set the Title of the report' with a text input field. Step 10: 'Set the Selection to make. "Select Everything Where (Note to select everything in the database leave this blank)"' with a dropdown menu, an equals sign, and another dropdown menu showing 'No Selection'. Step 11: 'Make The Report' with a button labeled '11. Make The Report'.

First select the database you wish to make the report for from the popup list to the right of the number 1.

The list of Quicktrack fields to the right will change depending upon which database you are using.

Then you must choose which fields you want to use in you report and in which order.

To do this select the field name from the list on the left titled Quicktrack fields and click the arrow buttons to move it to the list on the right titled Report fields. Drag the field names up and down the list to move the order of the fields or use the << arrows to move it out of the report.

Next set a page size in mm at step 3.

Then set the page margins at step 4.

In step 5 set the number of rows down the page for your report or labels. For labels take the number of labels down the page ie 6.

Then in step 6 set the number of columns across the page for your reports or labels. For labels take the number of labels across the page ie 4.

Next choose how you want to arrange the fields on the page, they can either be arranged across the page or down the page, in this way if you are printing labels you can choose whether successive numbers move down the page or across depending on what you require.

If you need a barcode on your report or label you can choose one now from the popup menu and specify a height in mm for it.

Next enter a title for the report.

The next item 10 allows you to select a subset of the data for the report.

If you leave it blank all the data in the database will be used for the report, or you can choose a subset using the popup menus provided.

The top popup at the end of this allows pre made values to match with, or if you wish to enter your own value you can in the box below.

Then click make the report to automatically make the report and add it to your layout templates.

This report will appear in the top level of the reports menu.

Moving And Managing Reports and Labels

Reports and labels can be subdivided into sections and moved between sections using the standard desktop of your computer.

In order to do this quit the Quicktrack application, navigate to the Quicktrack folder on your computer, on a PC it will be in Program Files - > Peninsula and on a Mac in the Applications folder.

Once inside this folder locate the Label Templates folder.

Inside here all the label and report templates are stored. The folders within this folder are the Layout Groups shown on the Report screen.

You can create new folders within this folder that will show in the layout groups menu, and also move label templates around within the folders to change where they appear in the layout menu.

To move a label or report template to another group simply drag the report to the appropriate folder and it will be moved in the layout menus accordingly when you restart QuickTrack.

To delete a report simply remove it from the Label templates folder.

Importing Data

Information can be imported from external sources into Quicktrack, this is useful if you already have an existing source for the data, ie your user records or a previous item database for example. The data must be exported from the previous application in a CSV (Comma Separated) or Tab delimited format for it to be imported into Quicktrack.

Importing Items

To import items into the item database choose Import then Import Items.

Item Data Import Instructions

You can import any csv (comma seperated), or tab seperated file into the database
To do this follow the steps below:

1. Click To Choose File To Import
2. Select File Type: CSV - Comma Separated
3. Choose The Line In The File To View: << >>
4. You must now map your file to the fields in the database.
The first line (record) in your file will be shown in the list to the left.
To change which line in the file you are viewing click the "<<" and ">>" buttons.
Drag the rows up and down to map the items to the field names shown on the right.
If you want an empty field in the database drag -Blank Line- to line up with your field names.
5. Pad First Imported Field In Each Record With Zeros: Import As Is
6. Convert Imported Dates: Don't convert date format
7. Select To Ignore First Line Of Imported File (this sometimes contains field names): ☐
8. Select To Lookup imported data from the internet and fill fields (ISBN, EAN, UPC): ☐
- 8a. Auto Reverse Names In Field i.e. Last, First: Import As Is
9. Click To Import The Data

QuickTrack Fields

- ID Number
- Description
- Make
- Model
- Colour
- Serial Number
- Purchase Date
- Category
- Notes
- Status
- Custom 1
- Custom 2
- Custom 3
- Custom 4
- Custom 5
- Custom 6
- Custom 7
- Units In Stock
- Retail Price
- Cost Price
- Location
- Loaned To
- Due Back

Once on this screen click the button 1 to choose a text CSV or Tab delimited file to import.

Then select the file type from the popup menu 2.

The first line of the file will appear in the Data In File box to the right, if this data does not make sense to you use the Choose the line in file arrows to navigate to a comprehensible line in the file.

Now you must choose what you want to import you do this by lining up the row in your file with the rows in the Quicktrack fields box to the right.

Drag the rows in the data in file box up and down to align them with the correct fields in Quicktrack. If there is a field which you do not have in your file drag one of the Blank Line items in the Data In File box to that position, you may have to do this a number of times.

If you want QuickTrack to automatically number the items in the file using its own serial numbers, drag a Blank Line item to the top of the list opposite ID Number.

Once you have done this you can choose whether the first line is padded with zeros from the popup at step 5.

Then at step 6 choose whether to convert the imported dates from US to UK or vice versa.

The next box allows you to ignore the first line of the file, sometimes this is used to store the field names and has no useful data in it, choose this option to ignore it.

The step at 8 allows you to autolookup the data for an item from the internet, this only works for Books, CD's, DVD's and videos and may corrupt your data if you already have this information. You should only use it if you only have the numbers for the items.

The last option is to auto reverse real names in an imported file ie from Fred Bloggs to Bloggs. Fred.

Once you have the options set click Click To Import The Data to import the file.

Importing Users

To import users into the user database choose Import then Import Users.

Once on this screen click the button 1 to choose a text CSV or Tab delimited file to import.

Then select the file type from the popup menu 2.

The first line of the file will appear in the Data In File box to the right, if this data does not make sense to you use the Choose the line in file arrows to navigate to a comprehensible line in the file.

Now you must choose what you want to import you do this by lining up the row in your file with the rows in the Quicktrack fields box to the right.

Drag the rows in the data in file box up and down to align them with the correct fields in Quicktrack. If there is a field which you do not have in your file drag one of the Blank Line items in the Data In File box to that position, you may have to do this a number of times.

If you want QuickTrack to automatically number the users in the file using its own serial numbers, drag a Blank Line item to the top of the list opposite ID Number.

Once you have done this you can choose whether the first line is padded with zeros from the popup at step 5.

Then at step 6 choose whether to convert the imported dates from US to UK or vice versa.

The next box allows you to ignore the first line of the file, sometimes this is used to store the field names and has no useful data in it, choose this option to ignore it.

The last option is to auto reverse real names in an imported file ie from Fred Bloggs to Bloggs. Fred.

Once you have the options set click Click To Import The Data to import the file.

Importing Locations

To import locations into the location database choose Import then Import Locations.

The screenshot shows a web interface titled "Location Data Import Instructions". At the top, there is a navigation bar with buttons for Menu, Items, Users, Locations, Book In/Out, Reports/Labels, Import, and Preferences. A search bar labeled "Find Item's Starting" is also present. The main content area is divided into two columns. The left column contains instructions for importing data, including steps 1 through 9. The right column contains a list of "QuickTrack Fields" that can be mapped to the data in the file. The "Data in File" column is currently empty.

Location Data Import Instructions

You can import any csv (comma seperated), or tab seperated file into the database

To do this follow the steps below:

1. Click To Choose File To Import
2. Select File Type: CSV – Comma Seperated
3. Choose The Line In The File To View: << >>
4. You must now map your file to the fields in the database.
The first line (record) in your file will be shown in the list to the left.
To change which line in the file you are viewing click the "<<" and ">>" buttons.
Drag the rows up and down to map the items to the field names shown on the right.
If you want an empty field in the database drag -Blank Line- to line up with your field names.
5. Pad First Imported Field In Each Record With Zeros: Import As Is
6. Convert Imported Dates: Don't convert date format
7. Select To Ignore First Line Of Imported File (this sometimes contains field names)
8. Select To Lookup imported data from the internet and fill fields (ISBN, EAN, UPC)
9. Click To Import The Data

QuickTrack Fields

- ID Number
- Name
- Row
- Shelf
- Position
- Company
- Building
- Street
- Town/City
- County/State
- Post/Zip Code
- Country
- Notes
- Custom1
- Custom2
- Custom3
- Custom4
- Custom5

Once on this screen click the button 1 to choose a text CSV or Tab delimited file to import.

Then select the file type from the popup menu 2.

The first line of the file will appear in the Data In File box to the right, if this data does not make sense to you use the Choose the line in file arrows to navigate to a comprehensible line in the file.

Now you must choose what you want to import you do this by lining up the row in your file with the rows in the Quicktrack fields box to the right.

Drag the rows in the data in file box up and down to align them with the correct fields in Quicktrack. If there is a field which you do not have in your file drag one of the Blank Line items in the Data In File box to that position, you may have to do this a number of times.

If you want QuickTrack to automatically number the items in the file using its own serial numbers, drag a Blank Line item to the top of the list opposite ID Number.

Once you have done this you can choose whether the first line is padded with zeros from the popup at step 5.

Then at step 6 choose whether to convert the imported dates from US to UK or vice versa.

The next box allows you to ignore the first line of the file, sometimes this is used to store the field names and has no useful data in it, choose this option to ignore it.

Once you have the options set click Click To Import The Data to import the file.

Using Mobile Devices

Quicktrack can process data from many portable barcode reader devices.

Gull, SPT and Palm Devices

Data can be transferred to and from Palm based devices by using Hotsync, and an appropriate conduit and application for the Palm device.

This maybe AssetTrack or QuickTrack on the Palm.

You also need an AssetTrack or QuickTrack conduit and Peninsula Hotsync folder at the PC or Mac end otherwise data will not be transferred.

Sending Data To A Palm

Choose Export Mobile Data From Items from the Import popup menu.

Then perform a hotsync with the device to transfer the data, existing data will be wiped from the device.

Getting Data From A Palm

Perform a hotsync with the device to transfer the data from the device, this data is not wiped in this process.

Choose Import Mobile Data To Items from the Import popup menu.

The data will be imported into Quicktrack and your database updated.

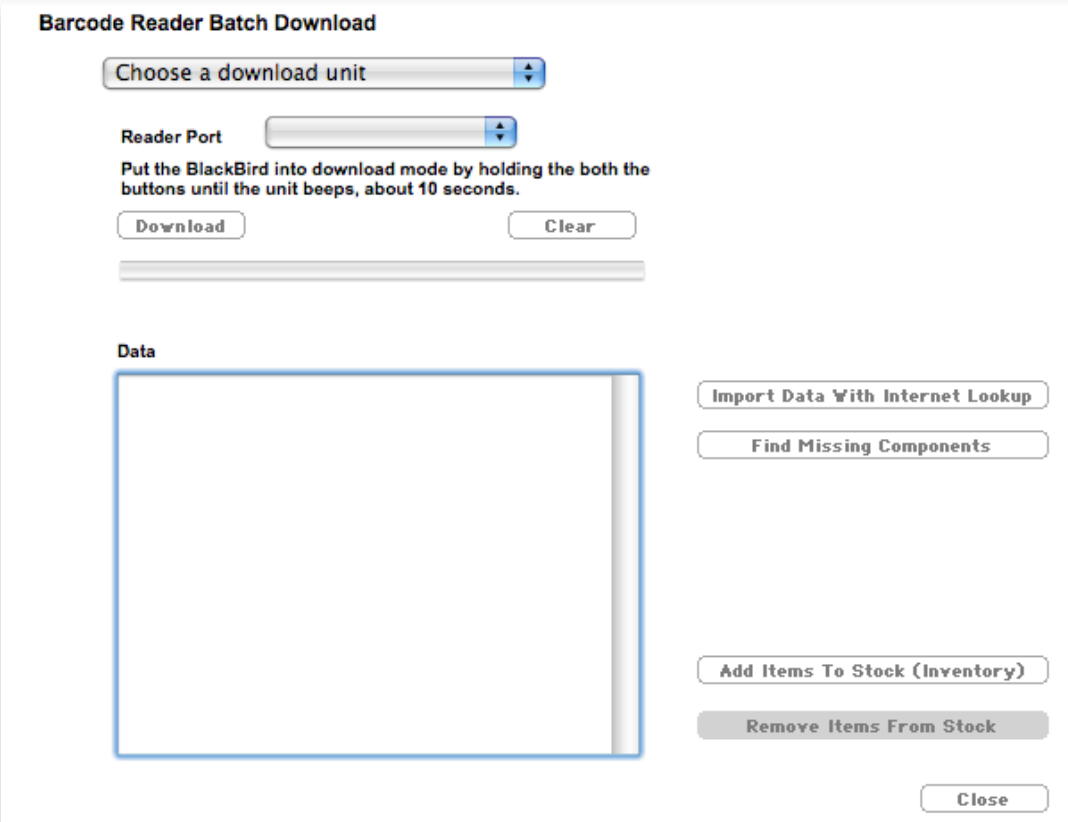
Blackbird, Magpie and Other Barcode Readers

Quicktrack can import data from various mobile barcode readers.

The data can be in various formats depending on the action required, for standard imports it will be one barcode per line.

For other imports the format may vary.

Choose Import From Mobile Reader from the Import popup menu, the following screen will appear.



The dialog box is titled "Barcode Reader Batch Download". It contains a dropdown menu labeled "Choose a download unit". Below this is a "Reader Port" dropdown menu. A text instruction reads: "Put the BlackBird into download mode by holding the both the buttons until the unit beeps, about 10 seconds." There are two buttons: "Download" and "Clear". Below these is a horizontal progress bar. A large rectangular area labeled "Data" is on the left. On the right, there are four buttons: "Import Data With Internet Lookup", "Find Missing Components", "Add Items To Stock (Inventory)", and "Remove Items From Stock". A "Close" button is at the bottom right.

On this screen you can download the data and perform various functions on the downloaded data.

First choose which reader type to use from the Reader Port popup menu.

There are specific choices for Peninsula mobile barcode readers, and a setting for other barcode readers.

The other barcode readers setting relies on the fact that the barcode reader can output text as a keyboard and the data can be sent to the Data box on this screen with one line per barcode, if not the data will not be processed.

If you have a Peninsula mobile barcode reader choose Blackbird or Magpie.

For Peninsula Blackbird barcode readers, hold both buttons until the unit beeps and then click the Download button to download the data.

For Peninsula Magpie barcode readers click in the data field and then plug the jack plug into the bottom of the unit, the download will start immediately.

For other readers click in the data field and scan the data into the field.

Once you have the data in the field choose an option from the buttons on the right of the window.

Import data with internet lookup will import the data into your items database and lookup the data from the internet whilst doing it.

Find missing components will produce a report of missing components for a master item, please refer to the Components section of this manual for further details.

Add items to stock, will increase the stock counts for multiple items, the format can be either a barcode on its own (where one item will be added) or a barcode and a comma then a number to indicate how many to add.

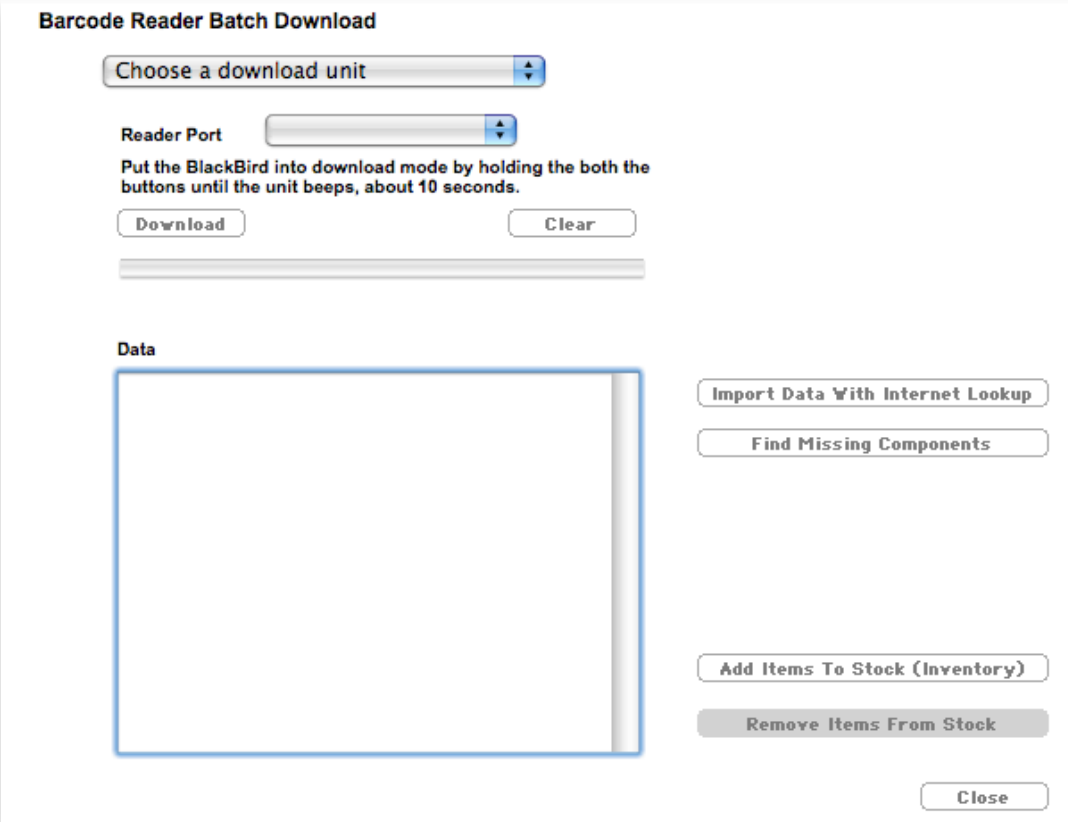
Remove items from stock, will decrease the stock counts for multiple items, the format can be either a barcode on its own (where one item will be added) or a barcode and a comma then a number to indicate how many to remove.

When you have finished click close to close the window.

Processing Batches Of Barcodes

Barcodes can be processed in batches using the mobile devices section of Quicktrack.

The barcodes can be in a previously made file or scanned directly into the window using a device such as a Phoenix barcode reader.



The image shows a software window titled "Barcode Reader Batch Download". At the top, there is a dropdown menu labeled "Choose a download unit". Below this is another dropdown menu labeled "Reader Port". Under the "Reader Port" menu, there is a text instruction: "Put the BlackBird into download mode by holding the both the buttons until the unit beeps, about 10 seconds." Below the instruction are two buttons: "Download" and "Clear". A horizontal progress bar is located below these buttons. In the center of the window is a large rectangular area labeled "Data" with a blue border. To the right of the "Data" area, there are four buttons stacked vertically: "Import Data With Internet Lookup", "Find Missing Components", "Add Items To Stock (Inventory)", and "Remove Items From Stock". At the bottom right of the window is a "Close" button.

Choose Import From Mobile Reader from the Import popup menu, the following screen will appear.

Once you have the data in the field choose an option from the buttons on the right of the window.

Import data with internet lookup will import the data into your items database and lookup the data from the internet whilst doing it.

Find missing components will produce a report of missing components for a master item, please refer to the Components section of this manual for further details.

Add items to stock, will increase the stock counts for multiple items, the format can be either a barcode on its own (where one item will be added) or a barcode and a comma then a number to indicate how many to add.

Remove items from stock, will decrease the stock counts for multiple items, the format can be either a barcode on its own (where one item will be added) or a barcode and a comma then a number to indicate how many to remove.

When you have finished click close to close the window.

FAQs

Changing Field Names

You can change field names to be more suitable to your application.

Click “Preferences” then click “Set Item Field Names” or “Set User Field Names” to set the field names for these screens.

Type a name and then press return to save it.

Editing Preferences

Click “Preferences” to see the Preferences menu, on this menu you will find all the customisable options for QuickTrack.

Choose General Preferences to show the preferences screen and navigate to the correct section using the buttons to the left hand side.

Changing the Default Loan Period

You can change the default loan period from 30 days to be more suitable to your application.

Click “Preferences” then click “General Preferences” enter the default period in the field and then return to the main menu

Printing Barcode Labels

Quicktrack can easily and quickly print barcode labels for your items. These labels are stored with all the other reports in the Reports and Labels section of the application.

Choose Reports / Labels then choose a layout group from the popup menu, then choose a layout from the Choose Layout popup menu.

If your labels are on sheets they will most likely have a Avery size number ie 7551, the layout in the menu have these size numbers to enable you to easily find the label type you need. If its not there you can make a new label using the Quickreport feature discussed earlier in this manual.

Setting Serial Number Defaults

Click “Preferences” to see the Preferences menu, on this menu you will find all the customisable options for QuickTrack.

Choose General Preferences to show the preferences screen and navigate to the correct section using the buttons to the left hand side.

Click “Serial Numbers”

Type in the settings for your serial numbers here

Turning on and off Dispatch Note Printing

You can turn on and off dispatch note and return address sheet printing to be more suitable to your application.

Click “Preferences” to see the Preferences menu, on this menu you will find all the customisable options for QuickTrack.

Choose General Preferences to show the preferences screen.

Click the check box Print Receipt When Booking to turn on or off the printing of the sheet and then return to the main menu by clicking OK.

Setting the Return Address for Dispatched Items

You can set the return address to be printed on the Return Address Sheet for dispatched items.

Click “Preferences” to see the Preferences menu, on this menu you will find all the customisable options for QuickTrack.

Choose General Preferences to show the preferences screen and navigate to the correct section using the buttons to the left hand side.

Choosing Organisation Information.

Enter the organisation details in the fields provided and then return to the main menu by clicking OK.

Autolookup Internet Connection and Firewall problems

Errors when using the auto lookup feature of Quicktrack to catalogue Books, DVDs and Cds.

If you get an error message 'Can't resolve hostname' or 'Connection refused' or nothing is found for any items when using the auto iLookup feature of Quicktrack follow the steps below.

This is due to an internet connection problem on your computer.

Check that your computer is allowed to connect to the internet. Start your web browser and enter this web address s1.amazon.co.uk this should bring up a screen asking you to enter an ISBN number, if not try another web address, if neither work your computer is not connected or configured for the internet and you should ask your network administrator for help.

If this works the Quicktrack application is being blocked from accessing the internet.

There is now a button in the Internet Setting which tests your internet connection from Quicktrack.

Select Preferences > General Preferences then Internet Settings and click Check Internet Connection.

This button allows you to test your connection to internet. If this test fails it indicates there is a problem with your internet connection, which maybe caused by a proxy or firewall. Please refer to the Internet Connection problems section at the end of this manual for details.

If you are using a proxy server, check that the proxy server is allowing incoming and outgoing access to s1.amazon.co.uk on port 80, to ecs.amazonaws.co.uk on port 80 and ecs.amazonaws.com on port 80. You also need to allow amazonaws.com on port 7040.

Also check that the proxy settings in Quicktrack are correct, go to Preferences > General Preferences then choose Internet Settings and check the proxy settings on this screen.

Check your firewall settings, it should not be blocking Quicktrack from accessing the internet. Note that after updating the software you may need to enable access in the firewall again.

Change your firewall settings to allow internet access for Quicktrack, you may also need to allow incoming and outgoing ports for Quicktrack depending on the firewall you are using.

If all else fails disable your firewall and if that doesn't work uninstall it. Some firewalls interfere with internet access even when they are turned off.

On the PC there are lots of Firewall programs in addition to the built in Windows Firewall that ships with Windows. Programs such as Norton Internet Security, Zone Alarm, McAfee, Kaspersky, Etrust and Panda vary from version to version and we cannot list complete instructions for all of them.

Windows Firewall

The standard windows firewall has settings to prevent applications accessing the internet.

Click Control Panel in your Start Menu

Then click Security Center

Then Windows Firewall

In the Exceptions tab click add program a window will appear with a list of applications, if Quicktrack is in the list then click it, otherwise click the browse button and navigate to Quicktrack which should be in Program Files > Peninsula > Quicktrack, click Open.

Then click OK to return the exceptions window.

You may also need to add port 7040 to the exceptions list, click Add Port and then enter 7040 in the name box and 7040 in the Port Number, check TCP, click OK.

Then Click OK again to to save all changes and exit the windows firewall configuration window.

Norton

Start Norton Internet Security or Norton Personal Firewall.

Click Personal Firewall, and click Configure.

On the Programs tab, in the "Settings for" drop-down list, select the Network Location that contains the program rule that you want to add a firewall rule to.

By default, the current Network Location is selected.

In the Manual Program Control list, select the program rule that you want to add a firewall rule to.

Under the Internet Access column, in the drop-down list, click Custom or Manually configure Internet access.

Click Add.

In the Add Rule wizard, select the action that the rule should take, and then click Next.

Select the type of connection that the rule should monitor, and then click Next.

Select the computers that the rule should monitor, and then click Next.

Select the protocols that the rule should monitor.

Select the ports that the rule should monitor, and then click Next.

Select whether the rule should be tracked and how you want it to be tracked, and then click Next.

Norton 360

Open Norton360 and select PC Security, Manage Firewall

Select "Program Rules" tab and then select / highlight the Quicktrack program from the program list

Change "Access" setting to "Allow" and close Norton 360.

Reboot computer

Zone Alarm

Select Program Control > Programs, locate the Quicktrack program, then in the Access column check the 'internet' setting.

Panda

Click on "Status" in the main Panda window.

Expand the Security protection panel, then click on Settings.

Click on Firewall, and in the Access tab, you will find several options that you can configure.

In section Programs with access to the network, click on Settings.

If the Apply the permissions specified without asking box is checked, uncheck it.

Look for Quicktrack whose permissions you want to change and modify them.

You can do so through the drop-down menu displayed to the right of the program.

Microsoft One Care

If you cannot make changes in Windows Firewall, the way around this is to open up MS One Care and click on "Change OneCare Settings".

In the next dialog turn off the firewall by moving the slider all the way down.

Apply the changes.

Activate Quicktrack.

Then turn the firewall back on in MS OneCare and apply the change.

