



## ToolTrakka Bulletin

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### So I have installed ToolTrakka. What do I do now?

Assuming that the install went without a hitch the next thing to do is to print out a copy of the manual.

#### Getting the Manual

A complete manual was saved at the time you installed ToolTrakka. You can find it in the program folder which, in a standard install, is C:\Program(X86) Files\ToolTrakka V7. The file is called 'ttmanual.pdf'. As you can see it is in PDF format. You should be able to open it by double clicking it. If Adobe Acrobat is installed on your computer it will start and open the manual on your screen. My suggestion is to just send it to your printer and get a hard copy.

All the instructions for operating and setting up ToolTrakka are explained in detail in this manual. At the back section of the manual is a supplement that details setting up and using the barcode reader. It is important that you read this as getting the barcode reader working correctly is not an intuitive activity. Do yourself a favour and read this section of the manual.

#### The next step is to set up the equipment categories.

ToolTrakka is installed with a 'bare bones' set of categories and sub-categories. While some of these 'default' might be applicable to your situation you will. Probably, some of the current categories will be fine. But others will not be applicable. And some categories will not have appropriate sub-categories.

So you will need to evaluate you own situation and set up categories and sub-categories that suit your situation.

This is important as each item of equipment **MUST** be set with both a 'Category' and a 'Sub-Category'. This is required and ToolTrakka will not allow you to enter details for an item of equipment unless you select **BOTH** a category and a Sub-Category. So you must have categories and sub-categories in place before you start.

So you should visit 'Setup|Categories|Equipment Categories'. If all the categories and sub-categories are useful in your circumstances (unlikely) you can just go with the, currently, installed categories etc.

But if you want to change some of these categories and subcategories you can.

For the category, just overtype the category name and move off it and the category will be renamed. To change the 'sub-category' you can overtype the current entry, delete the current entry (select the sub-category that you want to delete and press the DEL key, confirm and the sub-category will be deleted. You can also add a new sub-category by clicking in the 'new' record (at the bottom of the list) and entering a new 'sub-category'.

Of Course you can just delete all the 'Categories' (which will also delete all the associated 'sub-categories') and start again with a whole new set. Your choice.

What happens if I have a category that doesn't have any logical sub-categories? An example might be, say, Video Cameras which you may decide that you can't split this category of equipment into sub categories. Well, ToolTrakka requires you to have both a category and a subcategory for every item. So you must have at least one sub-category for every category that you have. The simple way around this problem is to just create a sub-category and name it the same as the category. Thus in the above

sample you would have a category called Video Cameras and a single sub-category also called Video Cameras.

If you are using 'consumables' you will also need to set up categories for these as well. The only difference is that consumables have only a single level (ie there are no sub-categories). In the case of Consumables we have not supplied an initial set of categories as the range of possible categories is so wide that any that we may have provided would have been doubtful use to you.

The important thing is that you must get your categories and sub-categories sorted before you get started entering your tools and equipment.

## **Business Units**

Business units declare an ownership of certain tools or equipment. For example one group of tools may belong to the 'Installation group' another set may be owned by the 'Maintenance Group' (these are just examples of course). The only part that this plays in ToolTrakka is that all reports can be restricted to a specific 'Business Group'. There are no restrictions on the issuing of tools or any other activity regarding business units.

You can choose to declare any number of business units or just have only one business unit covering all tools etc. ToolTrakka comes with a single business unit and names it as 'Central'. You can either use this business unit as is. Or rename it and, optionally, add other business units but you can't delete the single business that ToolTrakka starts with.

If you are going to use the 'Business Unit' facility you need to set them up before you start entering tools and equipment. This is not mandatory as you can add new business units at any time but it will be less work for you if you make the decision now and set them up if you need them.

## **Equipment, Equipment Sets, Consumables, Employees and Jobs**

I am not going to set out a complete set of instructions here for adding these. That is what the manual is for. Here I am going to just cover some of the finer points that may help you to set up ToolTrakka the way you want.

## **Equipment**

The main equipment form (File|Open|Equipment) is where you go to set up your equipment. Each item is displayed on a single page and there is a myriad of fields that you can use.

Many of these fields are optional and it is up to you to decide which ones will be useful to you. Four of the fields, however, are required and ToolTrakka will not let you insert any item of equipment until all four have some sort of entry in them. The four fields are: Model Number, Category, Sub-Category and Business Unit. In addition ToolTrakka will provide default entries for a number of fields. You can change these values but you cannot delete an entry and leave this type of field empty. This applies to any field that comes up in a new record with a value (as opposed to being empty).

The 'Brand Name' field and the 'Model Number' field are connected in that ToolTrakka always displays these two items joined together separated with a hyphen (eg Ryobi – 10mm Drill). In this case 'Ryobi' is the 'Brand Name' and '100mm Drill' is the 'Model Number'. You can (personally I don't think that this is a good idea, but you can do it) leave the 'Brand Name' field empty. If you do leave the 'Brand Name' field empty ToolTrakka will just show the 'Model Number' field elsewhere in the program.

Here are some of the other fields and the reason that they are in ToolTrakka...

### **SAP Number**

This is just a utility field in which you can put any identifier that you want. Some of our users have SAP systems and engage us to produce custom exports to their SAP system. If you want to do this then you should enter the SAP number of all items in this field and this becomes the link field for the SAP data export. Status – Optional field

**Barcode Prefix**

This field can be used to add a three character prefix to the barcode number. This might contain some characters that uniquely identify your equipment (eg your company name initials or some such). If you choose to use this field you should remember that the barcodes on your items must have this prefix contained in the code. Status – Optional field

**Barcode Number**

This is the number on the barcode that is attached to the current item. Every time you create a new item (tool or equipment) ToolTrakka will assign a number as the Barcode Number. This number will start at one for the first item you add and increment the number each time a new item is entered.

Usually the simplest way for you to work with barcodes is to just accept the number that ToolTrakka assigns and attach the appropriate matching barcode to the item at the time you enter it in ToolTrakka. There is, however, no need for you to follow this idea and you are free to change the barcode number from the number assigned by ToolTrakka to any other number that you choose. Also, the ability to change the barcode number of an item allows you to put a new barcode on an item (perhaps to replace a damaged barcode).  
Status – Mandatory if you are using barcodes

**Serial Number**

Obviously this is where you can insert the serial number of the item. Possibly useful for insurance claims.. Status – Optional

**Date Purchased**

Insert the date the item was first purchased. Possibly useful for insurance claims. Status – Optional

**Supplier**

The supplier of the item. Possibly useful for insurance claims. Status – Optional.

**Invoice Number**

The supplier invoice number provided when the item was purchased. Possibly useful for insurance claims. Status – Optional.

**Cost**

The purchase price of the item. Possibly useful for insurance claims. Status – Optional.

**Status**

This is the current status of the item. The item can be 'Current' or one of the other statuses available in the drop down list. Items start out with a status of 'Current' and this is the only status that allows an item to be issued. Any item with any other status is not available for issue. Status – Mandatory Field.

**Date out of Commission**

This field is managed by ToolTrakka and you cannot change any date in it. It records that date that the item was taken out of commission (ie made not current)

**Maintenance/ Calibration Due Date**

You can place a date in this field and ToolTrakka will monitor this date and warn you that it has been reached. Use it to remind you of dates such as 'Calibration Dates', 'Test and Tag Dates' etc. Normally ToolTrakka will scan all items each time it starts and will bring up a warning dialog notifying you if any item is due. Status – Optional

***Disable on Due***

This is a checkbox field, the state of which determines if the current item will be taken out of service if the Maintenance/Calibration Date (above) is reached. Check this box if it is imperative that the item not be allowed into the field if this date is exceeded.

***Hire Rate***

This is the hourly rate that can be applied to any item and is important if you are interested in charging clients for the notional hire of the equipment that you use on a job. The 'Job Summary Report', which costs a job uses this rate, the time out and the time returned to calculate the hire cost.

Please noted that this is an hourly rate and is applied by ToolTrakka by simply calculating the total time that the item was out and multiplying that time by the hourly rate. ToolTrakka has no concept of 'working days of so-many-hours' or daily rates of any type. If you are going to use this costing utility then you will need to set the rates appropriately. Status – Must be either zero or some other currency value. Cannot be empty.

***Asset***

This is a simple check box that declares whether an item is an asset as per the asset register. Status – Checked or not.

***Size***

This field was added to ToolTrakka for those clients that have the need to fly items around the country. Shippers will need the dimensions of the item. Put them here. Status – Optional.

***Weight***

Weight is also needed if you fly items. Status – Optional.

***Due Date for Return***

You can place a date in this field that indicates when an item is due to be returned. Not used very often as this date must be manually entered and this causes a lot of extra work. Use Judiciously. Status – Optional.

***Comment***

Put whatever you want in here. Status – Optional