



RGA ToolTrakka V7.0 Product Overview

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Who knows who's got what?

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Introduction

ToolTrakka provides any organisation that issues tools, equipment and/or plant to employees and/or jobs with a comprehensive system to manage the issuing, returning and accounting for that equipment. The system allows you to enter all your equipment and assign each item to a category and a sub-category. Once items are in the system you can issue them to employees, jobs, containers or contractors and track their whereabouts and account for the costs of usage.

Optional barcoding of all items allows you to quickly and efficiently record check-in and check-out transactions. ToolTrakka's barcode facility allows you to check equipment out and back in by scanning the location and the item. This works for equipment, equipment sets and for consumables.

At any time you can search for any item and find its location and status. In addition, you can list who has what, what is issued to a specific job, employee or contractor or what is in any container. You can list unallocated equipment of any category (or sub-category), search for items by category and sub-category to find out what is available in your store or yard at any time.

ToolTrakka provides reporting facilities that allow you to manage your inventory of equipment. In addition, ToolTrakka will report the hire cost of all equipment issued to any of the supported locations for the time each item is out. This is great for apportioning the cost of equipment hire to jobs. Reports also provide the costs of the items listed, sub-totals and grand totals for asset management purposes. The same information can be viewed on screen.

All reports in ToolTrakka can be exported to RTF files or Excel spreadsheet files suitable for Emailing.

Facilities are provided to take equipment out of service and issue it for repair. ToolTrakka features a pop-up reminder that due dates have been reached.

For those items that you issue to jobs in quantity (e.g. drills or angle grinders etc.) ToolTrakka provides 'equipment sets'. With equipment sets you can define equipment to be of the set type. Each of the items in an equipment set has the same barcode number. When you issue these items ToolTrakka will ask you for the quantity that you are issuing. ToolTrakka then tracks the items as a group. At the end of a job you can report on equipment sets and ToolTrakka will provide you with the hire costs of the items issued and also will report on the cost of lost items.

You can manage the issuing and tracking of the cost of consumables. ToolTrakka includes a complete purchasing and inventory control system and allows you to issue consumables either manually or using a barcode reader.

ToolTrakka provides an export facility that supports data delivery to large job costing and accounting systems such as SAP.

ToolTrakka can be configured as a secure system that allows you to restrict users by group to viewing the information only or provide editing rights as needed.

Setup

System Requirements

RGA ToolTrakka will run on virtually any standard PC running almost any Windows operating system. It is a multi-user system operating in Client server mode (i.e. the data resides on a server where it will be automatically backed up by your IT staff and the program module resides on the local computer)

ToolTrakka V7 Practice

The practice version of ToolTrakka is provided to make is easy to learn to use the program. It is a fully functional version of the program but is permanently connected to a set of 'practice' data files. These files come populated with data so you don't have to spend time setting up the base data to get started. You can just 'jump right on in' and start learning to use the program. This is great for teaching new employees.

Setting up ToolTrakka

Overview

System Defaults

The screen image below (Figure 1) shows the RGA ToolTrakka system defaults setup window.

Field	Value
Company Name	Ray Gudgeon and Associates
Street Address	None
Suburb	None
Postcode	None
Mail Address PO	None
Mail Address Suburb	None
Mail Address Postcode	None
User Name	Ray Gudgeon
Printer can print labels from the auto feed bin	<input checked="" type="checkbox"/>
Show Due Date Reminder	<input type="checkbox"/>
Minimum number of minutes for charge rate	60
Path to Counter	e:\ToolTrakka V6\prttcnt.mdb
Path to Data	e:\ToolTrakka V6\prttdata.mdb

Figure 1

This is where you manage various global program options for the program

The User information section of this form is relatively straight forward. The registered user and the company name are both inserted by ToolTrakka and you can't change them directly (this is part of the licencing system). You should enter your address and other contact information in the remaining fields. The entries here are used in many places in RGA ToolTrakka where headings etc. are required in reports etc.

The 'Printer can print labels from the auto bin' checkbox tells the system whether your printer can print barcode labels from the auto bin. Some printers cannot do this due to complex paper paths. If this is the case you should uncheck this checkbox and ToolTrakka will pause for each page and allow you to insert a label sheet into the manual feed shute.

'Show Due Date Reminder' determines if ToolTrakka will show the reminder pop-up on startup to remind you if there are items that are due for maintenance/calibration.

The 'Minimum number of minutes for charge rate' drop down allows you to set the time increments that ToolTrakka will use to calculate hire rates. If this is set to 60 (the default) then ToolTrakka will charge by the hour or any part thereof. If you set it to 15 Minutes (for example) ToolTrakka will charge for every quarter hour or part thereof.

In the system defaults section there are some entries that were inserted by the installation Wizard (ie the installation paths) as well as information that you should enter to define your setup. The entries are as follows:

Paths

The entries in the two path fields define the path to the data and counter files that RGA ToolTrakka requires. These entries were set by the installation Wizard and should not normally be changed. If it is necessary to move the main RGA ToolTrakka data files, you can do so but then you will need to change the relevant entries in every installation of RGA ToolTrakka on the system to reflect the new locations.

Setting up ToolTrakka for Your Company

Employees

All employees to whom tools and equipment will be issued need to be entered into the system. While you are entering employees into ToolTrakka you have the option of entering their clothing sizes. If you choose to do this you can, later, obtain a purchasing list detailing the sizes and numbers of each item of clothing required to fit out all of your staff.

Jobs

ToolTrakka allows you to issue tools and/or equipment either to employees, to jobs into containers and to external contractors. When tools are issued to jobs, the supervisor of the job becomes responsible for them. To be able to issue to jobs ToolTrakka needs to know the job details. This information is entered in the same way as employee information above.

Containers

In ToolTrakka you can set up containers into which you can place tools and/or equipment. You can then issue the container to a person or to a job. A container can be anything you want it to be. It might be a truck or van, it might be a job box that goes from job to job or it might be a toolbox issued to a tradesman or technician.

Contractors

Contractors are organisations or people that come onto your site and to whom you might want to issue items of equipment, containers or

consumables. You can produce printouts of all issues to contractors showing hire rate costs or consumable item costs.

Equipment Categories

ToolTrakka allows you to define categories of tools and equipment and sub-categories for each category. For example, if you issue drills you would have a category for drills and you might set up sub-categories such as 'electric', 'battery powered' and 'hammer' or you might have ladders with sub-categories of 'extension 3m', 'extension 5m', 'step 3m', etc

Consumable Categories

Consumable categories are a single layer set of categories to which consumable items can belong.

Entering, Editing and Managing Tools and Equipment

If you enabled the security system a user must be added to the security system by a member of the Admins group before they can use ToolTrakka at all.

To allow a user to enter, edit and manage tools and equipment in ToolTrakka they must be a member of the TTOperators group. If you wish to give a user access to the program to view, but not to edit, tools and equipment you should make them a member of the TTUsers group (See P13).

A note on issuing and returning items of equipment

In ToolTrakka there are two ways that you can issue and return equipment. You can do it manually via the keyboard and mouse or you can do it with the barcode scanner. ToolTrakka doesn't care how you perform these actions. Either way is fine. With the manual (by the keyboard and mouse) method quite some considerable effort has gone into the process to make it as quick and simple as possible.

Working Item by Item

The standard edit form shows each item of equipment on a single page. Here you can move from item to item using the navigation buttons (which is not very efficient if you have lots of equipment).

The easy way to get to an item is to search for it. Searching can be done on any field in the form, for example if you know the brand or model Number/description you can search on that field. If you know the serial number of the item you are after you can search on that field etc.

Once you have found the item you are after you can edit any of the information presented, issue or return the item or take the item out of commission. You should note that ToolTrakka will not allow you to issue an item unless it is not out of commission. To return an item you can simply delete the user, job, container or contractor from the appropriate combo field.

To issue an item, you open the 'Employee', 'Job', 'Container' or 'Contractor' combo and choose the person, job, container or contractor to which the item is to be issued and ToolTrakka issues it.

To transfer an item from one person to another, one job to another, one person to a job or a job to a person or any other combination with containers or contractors simply choose a person, job, container or contractor (other than the one the item is currently assigned to) from the

appropriate combo. ToolTrakka will transfer the item back into the store and then issue it to the new location that you have selected, adding the previous holder of the item to the History window.

Working by Category

Sometimes you are more interested in accessing your equipment by category. For example if an employee needs a specific type of item (eg a 5m extension ladder, or a network tester) you are not interested in specific items but in finding an item by category. "Do we have a battery drill that I can take?" might be the sort of enquiry that you may get.

To deal with this type of enquiry ToolTrakka provides an item by category facility. To access this you click on 'File|Open' and 'Equipment by Category'. ToolTrakka displays a form that shows items in each category and sub-category grouped together. Here you can select by category followed by the sub-category of the type of item you are looking for and ToolTrakka will display all the items in this category/sub-category grouped together. You can then simply scroll through the items (or search) to find out who has what, where each item is and which items are available. As in the 'Edit by Item' form, you can edit any item, add new items, delete items, issue items or return items directly in this form.

The screenshot shows a window titled "Equipment List by Category". Inside, there is a section titled "Equipment by Category" which contains a table labeled "Equipment List". The table has columns for ID, Brand, Model No., Date Out, and Hire Rate. To the right of the table are several dropdown menus for filtering: Categories (set to Drills), Sub-Categories (set to Battery), Employees, Jobs, Containers, and Contractors.

ID	Brand	Model No.	Date Out	Hire Rate
96	Makita	6221D		\$25.00
97	Makita	6221D		\$25.00
37	Makita	Cordless	26/04/2006	\$25.00
98	Makita	6221D		\$25.00
370	Makita 9.6V	6221DWE		\$25.00
371	Makita 9.6V	6221DWE		\$25.00
73	a Cordless Drill	6095D		\$25.00
72	a Cordless Drill	6095D		\$25.00
71	a Cordless Drill	6095D		\$25.00
70	a Cordless Drill	6012HDV		\$25.00
69	a Cordless Drill	6012HDV		\$25.00
92	Ryobi	14.4V		\$25.00
62	Ryobi 9.6V	M9212VR		\$25.00
59	Ryobi 9.6V	M9212VR		\$25.00
61	Ryobi 9.6V	M9212VR		\$25.00
60	Ryobi 9.6V	M9212VR		\$25.00

Repairing Equipment

If an item becomes damaged or ceases working it can be taken out of service and issued to a repair facility. To take an item out of commission for repair it must first be returned from the location to which it was issued.

To send an item for repair click 'File|Open' and 'Repair'. ToolTrakka displays an item form with a repair details section. Assuming the item is appropriately returned to stock and available click on the 'Status' combo and choose 'Out of Commission'. This action will cause the repair details section of the form to activate and you can enter the details of where the item is being sent and any notes you require.

When the item is returned, go to the same form, find the item, enter the 'Returned' date, any notes you want and the cost of the repair and place

the item back in operation by choosing 'Current' in the 'Status' combo. The item will now be available for issue as needed.

Setting reminder dates

When you enter an item of equipment (or indeed at any other time) you can set a date that some action is due (this can be anything you want but would normally be a calibration date, the date of the next service, the date that an item expires etc).

To do this simply go to the item and enter a date in the 'Calibration/Maintenance Due' field. When you then go to 'View|Equipment Status' you can specify a date in the 'Due' field and ToolTrakka will list all the items whose 'Due Date' has been passed.

ToolTrakka also features a pop-up warning dialog that will pop up on start up if there are any items due for calibration/maintenance to warn you of this situation. This pop up facility can be disabled from the main Setup|Defaults window.

Finding and Viewing Tools and Equipment

ToolTrakka provides three ways of viewing equipment and its status. The first two are simply 'view only' versions of the edit forms described in the previous section. These operate exactly as the edit forms except that you can only search for items and view them. You cannot change anything in these forms or issue or return items.

The screenshot shows a dialog box titled "Equipment Status" with a close button (X) in the top right corner. The main heading is "Criteria". In the top right corner, there are "OK" and "Cancel" buttons. Under the heading "View by...", there are two dropdown menus: "Category" and "Sub-Category". Below these are several radio button options: "Unallocated" (which is selected), "By Person", "By Job", "By Container", "By Contractor", "Due for Calib/Maint. Date" (with a date field containing "12/05/2006"), and "All".

The third facility is the 'Equipment Status' tool. This tool allows you to view a list of items by any of a very wide range of criteria. To activate this tool you can click 'View' and 'Equipment Status'. ToolTrakka displays a dialog box with a number of 'criteria' fields. You use these fields to build a compound set of criteria that will restrict the list of items you wish to view.

Some examples of criteria you could set up are:

Let me see all the drills allocated to the hospital job

Let me see all the ladders of any type allocated to John Smith

Let me see all the equipment allocate to the Smith's Industries Job

Let me see a list of all the test equipment we have

Let me see a list of all the unallocated crimp tools

etc.

Equipment Sets

Overview

You can use equipment sets to manage equipment items that you issue (usually to jobs) in large numbers. Examples of such an item might be angle grinders or drills. These items are ubiquitous and are often issued, say, 20 or 30 at a time to a job.

Managing such items on a one-on-one basis would be time consuming and tedious. ToolTrakka's Equipment sets feature allows you to declare items as sets and to issue and return them in bulk with a single transaction.

Included with the feature are two reports that allow you to retrieve hire rate data and lost costs for Equipment set items.

Issuing and Returning Equipment Sets

You can issue an equipment set manually via either the Equipment Sets form or the Equipment Sets by Category form. From the 'equipment sets' form find the equipment set that you want to issue and choose the job, employee, contractor or container to which you want to issue the item(s) from the appropriate drop down list. ToolTrakka will display a 'quantity' dialog with a default value of 1. If this is the quantity you want to issue you can just click OK. If not, you enter the quantity you want to issue and click OK. ToolTrakka will issue the item(s) and update the 'Issues' table at the bottom of the form.

You can perform the same actions on the 'equipment sets by category' form.

Part No	Brand Name	Model No/ Desc	Qty in Stock	
Select	1234567	Ryobi	100mm Angle Grinder	4
Select		Bosch	1/2 20 1/4 inch drill	9
Select		Makita	M26 Electric Saw	26
Select	797979798	Bosch	m36 8mm battery Drill	134
Select	7987987	Skil	Belt Sander	61

Location	Qty Issued	Date	Return Date	Qty Returned
Leumseh Roundabout	2	26/04/2006 4:36:55 PM	26/04/2006 4:44:16 PM	2
Construction Box	10	21/04/2006 4:41:00 PM		0

Auditing

ToolTrakka's auditing facility allows you to validate the location of your equipment. This facility can only be used with a barcode reader.

The idea is that you can scan the barcode of a location (an employee, a job, a container or a contractor) and then scan all the items at that location. You can do this for multiple locations in any one batch.

You then use the 'Auditing' facility to upload this batch and ToolTrakka will analyse all the items that are in the batch, work out if any items are missing or in the wrong location and produce a report showing the status of all items at the locations.

Managing Clothing

Overview

ToolTrakka allows you to manage the purchase and issue of clothing to staff. The system allows you to enter all classes of clothing by size. You can set minimum stock levels, order quantities and to monitor your stock.

Purchases can be monitored, issues to personnel can be recorded and a range of reports can be printed.

Setting up Employee Clothing Sizes

If you take the trouble of entering the clothing sizes for all your employees into their personal records you will be able to print a complete list of all the clothes that would need to be purchased to outfit all your employees.

Setting up suppliers

Before you can purchase clothing you need to set up the suppliers from whom you will purchase them.

Issuing Clothing

To issue clothing to any employee you click on 'File|Open|Clothing Issues'. You will be taken to a form that allows you to assign specific items of clothing to any employee. You simply select the employee from the drop down list, select the item of clothing that you wish to assign (Note that the quantity you currently have in stock is displayed along with the description of the item – you will not be able to issue more items than you have in stock) and select the quantity that you wish to issue. ToolTrakka will record the issue and deduct the it from your inventory listing.

Viewing Who Has What Clothing

If you want to see what clothing has been issued to any employee click on 'View|All Personal Issues'. ToolTrakka will take you to an employee form that displays all the clothing and tool issues.

Printing Clothing Issues

You can print clothing issues for either a specific employee or for all employees.

Managing Consumables

Overview

ToolTrakka contains a complete management and issuing system for consumables. Facilities are provided to manage the consumable items, manage suppliers, create purchase orders, receive goods and issue items to employees, jobs, into containers and to third party contractors.

Through the reporting system you can monitor the costs of all issues to allow you to distribute costs or to invoice third parties for items consumed.

Setting up Consumables

To set up consumables you can click on 'File|Open|Consumables'. ToolTrakka will take you to the consumables editing form. Here is where you set up the items that you will be issuing.

Item ID	13
BarcodePrefix	D
Barcode	13
Categories	Grinding Wheels
PartNo	PN 05436
Description	60 grit Sharpening Wheel
Re-order Qty	10
QtyToOrder	20
QtyInStock	49
AverageCost	\$22.00

Supplier	Address
Smiths Supplies	lgdlk-sj jfdsljk fjdsllkj NSW

Add New Supplier

Figure 2

The first field is the ItemID and is generated automatically by ToolTrakka (you cannot change this). The next field is the barcode prefix. This is an optional field that allows you to enter a single letter for some type of categorisation system that you might like to create. Normally this field is set to 'empty' by ToolTrakka.

The next field is the Barcode number of the item. By Default ToolTrakka sets this to the same value as the ItemID field. You are free to change this to any sequence of numeric characters that you wish.

Alternatively you can have ToolTrakka use a EAN.UCC standard 13 digit barcode that is already on the item (or its package). Using these barcodes is extremely convenient for the person issuing the items. That person just has to scan the location barcode (the person/job/container/contractor) and then scan the barcode on the item(s) to record the transactions. This obviates the need for barcodes mounted on storage racks or wherever in your store.

To get the value of this barcode into ToolTrakka you can simply scan the item from this form.

Following these are fields for a category, a part number and a description.. The category and a description are both required.

ToolTrakka features a stock control system based on minimum and quantity-to-order fields. You can set the values for these fields for any item. You can then instruct ToolTrakka to analyse your consumables and recommend an order to bring your stocks to your required levels.

ToolTrakka maintains the 'quantity in stock' and 'average cost' fields.

Setting the Suppliers for an Item

For each item you enter you need to specify the suppliers from which each can be purchased. Of course items may be purchased from different suppliers at different times for various reasons so ToolTrakka allows you to set more than one supplier for any item.

Making Purchases

ToolTrakka's purchasing module allows you to create purchase orders for your consumable items. The general process is that you create an order for items you need on each supplier, print it and mail or fax it to your supplier. When the supplier delivers the items you go to the purchase order in ToolTrakka and record the items received complete with their price. ToolTrakka maintains the inventory for you and monitors all items issued.

Receiving items against a purchase order

The printing of an order is the signal to ToolTrakka that you have actually placed the order on your supplier. ToolTrakka will not allow you to receive any goods against an order until you have printed the order.

Once you print the order the 'Receipt' buttons on the line items will be enabled. You can simply click on the 'Receipt' button and enter the quantity received and the price. Note that you can receive any number of part deliveries against any item.

Once you enter any receipt ToolTrakka will update the inventory, the average cost of the items of that type on hand and the number of items still on order.

Cancelling an order

ToolTrakka allows you to cancel an order at any time. When you cancel an order all the line items on that order are deleted and ToolTrakka will then no longer allow you to enter any new line items or receive any items against it.

Adjusting Inventory

There are a number of circumstances where you may want to manually adjust the quantity of an item in stock. Items get lost, errors can be made in actual counts etc.

ToolTrakka does not provide you a direct method of editing the quantity in stock of any item. To make such changes you need to make an 'Inventory Adjustment'. An inventory adjustment allows you to record

positive or negative changes to your inventory to account for circumstances such as those listed above.

Issuing Consumables

You can issue consumables either manually via an issues form or by using the barcode scanner.

To issue consumables via the issues form to any employee/ Job/ Container/ Contractor you click on 'File|Open|Consumable Issues'. You will be taken to a form that allows you to issue specific consumable items. To make it easier to find items ToolTrakka provides a 'Categories' drop down. You can simply choose the category of the item you want to issue, find the item in the list that appears, select it and then select the employee/ job/ container or contractor from the relevant drop down list.

ToolTrakka will pop up a dialog where you enter the quantity to issue (This is pre-populated with 1)

If you want to issue consumables using the barcode scanner you simply scan the location (i.e. the employee, Job, container or contractor) barcode and then scan the consumable(s). Once you have scanned the location ToolTrakka will allow you to scan any number of other consumable items and will issue these items to the previously scanned location.

To move to a different location scan the 'Reset' standard barcode. This will terminate the batch and return you to the next location scan.

The scanning process is transparent to the type of item that you are working with. ToolTrakka doesn't care if you mix transactions of any type in any batch. So, for example, you can scan an equipment item, then a consumable, then another equipment item and perhaps a container. Then move to another location and scan any mix of items all in one batch. You can then process this batch and ToolTrakka will sort it all out.

Please note: there is a limit to the size of the storage for transactions in both the scanner and in the program itself. You should be able to safely batch up to 50 transactions but beyond that you may run into 'buffer overruns' if this occurs an error will be generated and you will lose transactions. Our recommendation is that you should limit batches to 50 transactions at most.

Printing Consumable Issues

To print a list of consumable issues you click on 'File|Print|Consumables Issues'. ToolTrakka will display a dialog box (shown below).

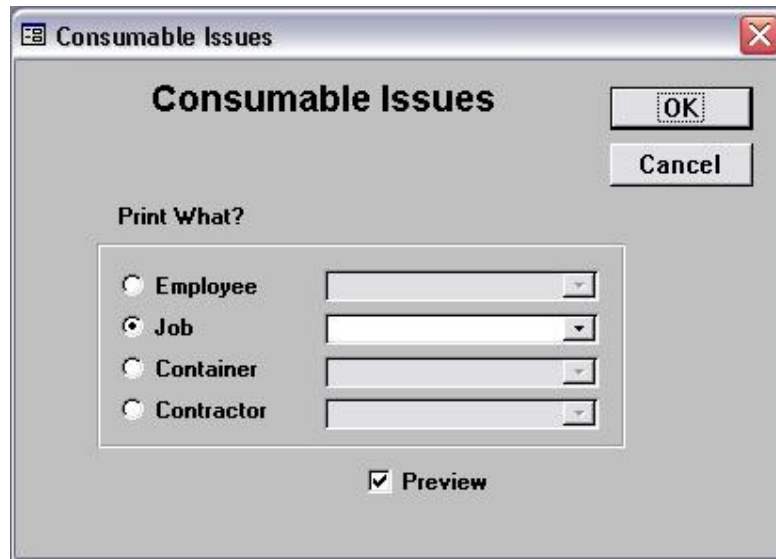


Figure 3

Here you can choose what type of location you want to print. Once you have chosen either 'Employee', 'Job', 'Container' or 'Contractor' the relevant drop down list activates and you can either choose a specific employee/ job/ container or contractor from the drop down or you can leave the drop down list empty and you will get all.

Once you have made your choice the report will be either previewed on the screen or printed, based on whether the 'Preview' check box is ticked or not.

Printing Reports

ToolTrakka provides reports specifically designed to make it easy for you to manage your tools and equipment. All reports in ToolTrakka can be exported to Rich Text Files (RTF) which can be emailed to other users. Once received these files can be opened and printed using Microsoft Word. In addition, all reports can be exported to Microsoft Excel files for further formatting or analysis.

Equipment by Employee

This allows you to print all the equipment issued to any, or all, employee(s).

Equipment by Job

Allows you to print a listing of all items issued to any job or to all jobs.

Equipment by Category

Choosing 'Equipment by Category' allows you to select a category, and optionally, a sub-category for a list of all items in that category/sub-category.

Equipment in Repair

Equipment in Repair does exactly what you expect. It lists all the equipment out for repair and reports the whereabouts of every item.

Equipment Set Costs

This report lists all the costs associated with an employee, job, container or contractor. It prints the date that items were issued, the date returned, the hire costs for the period that the items were out and the cost of lost items over a user selectable date range.

Job Summary

This report brings together all the costs associated with a job. This includes Equipment Hire, Equipment Sets hire, Equipment Sets losses and consumables. There are three sections to the report covering each of the types of items listed above with totals brought out for each and for the job as a whole. This report is only valid once the job is complete and all items, equipment sets and consumables have been returned.

Job Summary to Date

This is the same report as above but it uses the report date to simulate the return of all items. It provides a 'snap shot' of the running costs of the job 'to Date'.

Barcodes

ToolTrakka has facilities to print out barcodes for all items that can have a barcode. Generally you will need to print your own barcodes out of ToolTrakka for employees, jobs and contractors as these are changing items and you need the flexibility to add and remove employees, jobs and contractors on a regular basis.

While you can print tool and equipment barcodes from ToolTrakka we do not recommend that you do this. It is highly unlikely that paper labels will stand up to the rigours of the environment in which these items are used. Paper barcodes will not survive and will quickly become difficult for scanners to read. We highly recommend that you purchase metal barcodes specifically designed to handle the wear and tear to which these barcodes will be subjected..

If you are using consumable items that do not have their own EAN.UCC barcodes you probably will want to print your own barcodes for these onto labels so they can be adhered to shelf boxes or the shelves themselves or to some other medium from where you can conveniently scan them as the items are issued. Under these circumstances the environment is not so harsh as that to which equipment is subjected. Thus barcodes printed on paper labels will probably suffice.

Clothing and Consumables

Reports are available in ToolTrakka to print purchases and issues of both clothing and consumables. These provide detailed costing and inventory information for these items.

Security

When ToolTrakka is delivered the security system is disabled. If you want to use security you will need to enable it.

If you enable security ToolTrakka allows you to set different access rights to your data for different classes of users.

ToolTrakka implements a security system based on users being members of groups and obtaining their access rights via that group membership. Individuals have no specific rights of their own.

Operating the system is very simple for users once an administrator has set up a user account. As ToolTrakka starts up it requests that the user enter a User ID and a password. Once the user has successfully logged on ToolTrakka knows what rights he/she has in the system. Users can change their own password but that is the only part they play in the security system.