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A Tool Management System

Tool coding

Many organizations have a system of marking or identifying individual tools. If you already have some sort of marking, in most cases ToolTrax can accommodate your system. In any case, a good system uses an identification marking or code unique to each tool, vehicle, instrument or any other type of equipment whose location and information needs to be tracked. ToolTrax uses a code of up to 8 characters for each tool in the database. While it is not essential that you use such a code for ToolTrax to function, it is highly recommended.

ToolTrax sorts by tool code. Using the first part of the code as a group designation, the sorting capabilities of ToolTrax will keep tools of like groups together, making it easier to work with the files. Two examples of such a code are shown below.

<u>Tool Code</u>	<u>Tool Group and Number</u>
100-055	Office equipment, item # 55
200-034	Vehicle #34
420-211	1/2" Drill #211
(or)	
OFF-055	Office equipment, item # 55
VEH-034	Vehicle #34
LAD 478	Ladder #478
DR-211	Drill #211

Tip: Keep the groups simple but allow room for expansion as your organization grows.

Tool Files

ToolTrax uses five files that you can name to suit your needs. Each file can be opened and viewed separately. Divide your tools and equipment into "super groups" such as Vehicles, Power Tools, Instruments, Heavy Equipment, Ladders/Scaffold, Hand Tools or any other category that fits your inventory.

Each file is limited to 400 tools, so you could have more than one file for a large "super group", like Power Tools #1 and Power Tools #2. The total capacity of ToolTrax is 2000 records.

Inventory

If you do not have a tool inventory ready to enter, click on Print Inventory Form in the File menu of any [Tool Card](#) to print a sample form. Use this form to make a list of any equipment and tools that you want to include in ToolTrax.

Use your existing system or set up groups and numbering to suit your needs. Then permanently mark each tool with its unique code. An electric engraving tool works well on items like drills and electric roto-hammers while painting or stenciling is usually adequate for larger pieces of equipment like trucks, ladders and the cases of tools. The emphasis is on **permanent**; markers or stick-on labels attached to valuable tools rub off or can be

removed if stolen.

A typical ToolTrax file and tool code structure might look like the following table.

<u>Trucks</u>	<u>Power Tools</u>	<u>Hand Tools</u>	<u>Ladders</u>	<u>Instruments</u>
VEH001	HDR001	SHOV001	LAD001	VT001
VEH002	RHAM001	PICK002	LAD002	VT002
VEH003	RHAM002	WHBAR01	LAD003	VT003
VEH004	JHAM001	SHAM001	SCAF001	CT001
VEH005	CDR001		SCAF002	HPOT001

Summary: Set up a tool coding system, inventory your tools and equipment then move on to Setting Preferences.

See Also

Tool Cards

Site Cards

Editing Tool Cards

Tool cards are the forms used to add, delete or edit information on each tool in the files. The tool cards are separated into five custom named files.

To add or edit tool records

1. Choose a custom file from the Edit menu.
2. Click Add Record to add a new tool or use the Search menu to find a tool for editing.
3. Edit the tool card.
4. Move to another card or click Close to save changes and close the Tool File.

Tip: You can view and edit a single Tool Card from a Tool File by selecting the tool and pressing F2.

To delete a record

Click on Delete Record of the tool that you want removed. When you close Tool Cards, all tools with the Delete Record check box selected will be deleted. Click the check box again if you decide not to delete the tool.

See Also

[Edit Menu](#)

[Search Menu](#)

Tracking Tools

Opening a tool file from the File menu shows basic information about the tools in a grid and a list of sites. You can quickly find and transfer tools to a selected site or prepare a list of tools scheduled for transfer to selected sites.

To transfer a tool

1. Choose a custom file containing the tool from the File menu.
2. Scroll through the display or use the Search menu to find the tool.
3. Select the tool or tools to be transferred.
4. Select the new location from the site list.
5. Click on the Transfer button.

You can also transfer a tool to the selected site by double-clicking the tool anywhere on its row.

To schedule a tool for transfer to a new site

1. Follow steps 1 to 4 above.
2. Click on the Schedule Transfer button.

Note: When a tool has been scheduled for transfer, a "S" will appear in the fourth column of Tool File, labeled "S", as a reminder. When scheduled for transfer, a tool cannot be transferred or scheduled again until it is either confirmed or removed in the Scheduled for Transfers window.

Tip: The printed report in the Scheduled for Transfer window can be used as a transfer order. After tools are delivered, the report can be marked and turned in so that transfers can be confirmed in Scheduled for Transfer.

See Also

[File Menu](#)

[Printing Reports](#)

[Scheduled Transfers](#)

Finding Tools

To find a tool in a file

1. Choose the file from the File menu.
2. If the file is not empty, the file will load.
3. Scroll through the grid or use the Search menu to find a tool.

To find a tool at a site

1. Choose Tools on Site from the File menu.
2. Select the site which you want displayed from the Sites dialog box.
3. Click Inventory.
4. If any tools are assigned to that site, a grid will load with the tool list for that site.
5. Scroll through the grid or use the Search menu to find a tool.

Tip: You can view tools assigned to a site by double-clicking on the name in Select Site.

See Also

[Tracking tools](#)

[Edit Menu](#)

Printing Reports

Reports may be printed from any of the forms. Also, in Tool File, a Loss Report may be printed containing the tool information usually necessary with insurance claims or police reports.

To print a report from Tool File

1. Choose Print from the File menu.
2. In the Print dialog box, select All to print the entire file or Selection to print only the tools selected in the grid.
3. Click on OK to begin printing.

To print a Loss Report from Tool File

1. Choose Print Loss Report from the File menu.
2. In the Print dialog box, selecting All will print a report of all tools in the file marked as "Missing". Choosing Selection will print a report of tools marked "Missing" from the tools selected in the grid.
3. Click on OK to begin printing.

To print a report from Tool Card or Site Card

1. Choose Print from the File menu.
2. In the Print dialog box, select All to print the entire file or Selection to print the individual card displayed.
3. Click on OK to begin printing.

Note: A report printed from Tool Card shows all information including memos.

To print the current Scheduled for Transfer

1. Choose Scheduled for Transfer from the View menu.
2. From the File menu, choose Print .
3. Click on OK to begin printing.

Note: The report on Scheduled for Transfer can be used as a transfer order. After tools are delivered, the report can be marked and turned in so that transfers can be confirmed in ToolTrax.

See Also
[File Menu](#)

File Menu

Custom files numbered 1 to 5

Opens a tool file in Tool File.

Tools on Site

You can select a site to view tools assigned to it.

Scheduled Transfers

Opens Scheduled Transfers for viewing and confirming tools scheduled for transfer.

Print

Prints all or selected tools displayed in the window.

Print Loss Report

Prints a report of any tools in the file displayed that are listed as missing .

Print Setup

Sets the printer options before printing. You can select a printer or change options for the printer. The options available depend on the type of printer selected.

Exit

Quits ToolTrax.

Edit Menu

Undo

Reverses certain commands or actions.

Copy

Copies the selection and places it in the Clipboard.

Cut

Deletes the selection and places it in the Clipboard.

Paste

Copies contents of the Clipboard at the insertion point.

Select All

Selects all tools displayed.

Custom files numbered 1 to 5

Displays Tool Cards for editing or adding tools to the selected file.

Sites

Displays Site Cards for editing or adding sites to ToolTrax.

Preferences

Displays the Preferences form for configuring ToolTrax.

Sort

In Tool Card, sorts file by tool code.

Remove

In Scheduled Transfers, removes a tool from the schedule.

View Menu

Tool Card

Opens a Tool Card of the tool selected in Tool File. The Tool Card displayed is limited to the selected tool.

Shortcut: Select a tool then press F2.

Summary Info

Displays information about the file in the current window such as number of tools in the file, total value of the tools and the number, value and percentage of tools in various conditions.

Summary Info - All Files

Same as Summary Info for all five files.

Search Menu

Search offers several methods for finding tools. Choose a menu item and then type your search in the dialog box. Search is not case sensitive.

By Description

Searches the file for the first occurrence in a tool description.

By Tool Code

Same as By Description but searches the tool codes.

By Site

Searches for tool at a particular location.

By Previous Site

Searches for tools by their previous location.

By Condition

Searches for tools in the selected condition.

Find Next

Finds the next occurrence of a search.

Shortcut: F3

Go To

Displays the Tool File row or Tool Card record typed in the dialog box.

Find Site

In the Tool File, finds a site in the Site list. Type all or part of a site name or number in the dialog box.

Shortcut: Ctrl + F

Previous Record

In Site Cards and Tool Cards, moves to the previous record.

Shortcut: F4

Next Record

In Site Cards and Tool Cards, moves to the next record.

Shortcut: F5

More Menu

Displays more of a large list of tools. Not enabled when the list is less than 2000 records long.

Help Menu

Contents

Displays the Help table of contents.

How to Use Help

Displays Contents for How To Use Help.

Shortcut: Press F1 while using Help.

About ToolTrax

Displays the version number of ToolTrax, copyright notice, installed math coprocessors and available memory.

Setting Preferences

Using the Preferences card, you can configure ToolTrax with your company name and address, set a password and create custom named files for working with your tools and equipment.

To set or change preferences

1. Choose Preferences from the Edit menu.
2. Type in the company name, address and other general information as you would like it to appear on reports.
3. Name each tool file to suit your situation. Each file contains up to 400 items so name the files for major categories of equipment such as Vehicles, Power Tools, Office Equipment or Test Instruments. You can use two or more of the five files for groups of equipment that are more than 400, like Power Tools #1 and Power Tools #2. Define the five files before entering tool inventory and allow for expansion.
4. If you do not want to use a password, leave the password box as is. To change a password select all of the existing password then type in your new text. Deleting all the text or typing in "None" will cancel passwords.

Note: Even when empty, the password box shows password characters (*****).

5. Click OK.

See Also

[Edit Menu](#)

Editing Site Cards

Any tool location can be stored in the Site Cards, including repair shops, other company divisions and service trucks as well as job sites.

To add or change sites

1. Choose Sites from the Edit menu.
2. Click Add Sites to add a new site or use the Search menu to find a site for editing.
3. Edit the Site information.
4. Move on to another record, choose Add Sites again or click Close to save the record and leave Site Cards.

To delete a site

Click on Delete Site of the record you want removed. When you close Site Cards, all sites with the Delete Site check box selected will be deleted. Click the check box again if you decide not to delete the site.

See Also

[Edit Menu](#)

[Search Menu](#)

[Site Cards](#)

Entering Inventory in Tool Cards

After marking and taking inventory of your tools and equipment, enter the information in the custom files that you have created.

To add or edit tool records

1. Choose a custom file from the Edit menu.
2. Click Add Record to add a new tool or use the Search menu to find a tool for editing.
3. Edit the tool record.
4. Move to another record or click Close to save the record and close Tool Cards.

Tip: You can view and edit a single Tool Card from a Tool File by selecting the tool and pressing F2.

See Also

[Edit Menu](#)

[Search Menu](#)

[Tool Cards](#)

Menu Commands

File

Edit

View

Search

More

Window

Help

Site Cards

Use the Site Cards to store information about locations for tools and equipment such as addresses, telephone and FAX numbers and contacts or supervisors. All locations kept on the Cards are displayed on the site lists in Tool File. Include such locations as job sites, company divisions, service vans, repair shops and warranty centers.

To open Site Cards

Choose Sites from the Edit menu.

See Also

[Editing Site Cards](#)

[Printing Reports](#)

[Edit Menu](#)

Tool Cards

Use the Tool Cards to store a tool's code, description, purchase information, location and condition. When a tool is transferred, the date of transfer and the previous location is recorded. A memo of up to 1006 characters can be kept for additional data such as repair costs, license numbers or reminders. The maximum number of Cards per file is 400 and they can be sorted by tool code.

To open Tool Cards

Choose one of the five custom files from the Edit menu.

See Also

[Editing Tool Cards](#)

[Printing Reports](#)

[Edit Menu](#)

ToolTrax Forms

Several forms are used in ToolTrax for keeping tool records and tracking the locations of tools.

[Tool File](#)

[Tool Cards](#)

[Site Cards](#)

[Scheduled Transfers](#)

[Summary Info](#)

Tool File

When you open a file from the File menu, the Tool File displays the tools in a grid and a list of sites. Use this window to find and transfer items selected from the file. Any number of the five, custom files can be opened at once, for quick access. Also, the tools assigned to a particular site can be viewed with the same search and transfer capabilities available for the files.

To open a file in Tool File

1. Choose a file from the File menu.
2. If the file is not empty, Tool File will display the tools assigned to that file.
3. To open additional files, repeat steps 1 and 2 above.

Note: If more than one file is open, move to another file by choosing its name from the Window menu. Or click on its window.

To open a display of tools assigned to a site

1. Choose Tools on Site from the File menu.
2. In the Sites dialog box, select a site.
3. Click on View Tools.

You can also view tools assigned to a location by double-clicking on its name.

To close a Tool File, click on the Close button.

See Also

[File Menu](#)

[Tracking Tools](#)

Scheduled Transfers

By selecting tools in Tool File and clicking Schedule Transfers, a list is created with tool code, description, present location, planned destination and current condition. The list can then be printed and used as a transfer order. The location of the tool does not change in the file until the transfer is confirmed on Scheduled Transfers.

To open Scheduled Transfers

Choose Scheduled Transfers from the View menu.

To confirm a scheduled transfer

1. Choose Scheduled Transfers from the View menu.
2. Select the tool or tools to be confirmed.
3. Choose Confirm Transfer.

To remove a tool from the schedule

1. Repeat steps 1 and 2 above.
2. Choose Remove from the Edit menu.
The Remove dialog box will appear.
3. Choose OK.

Note: When a tool is removed from Scheduled Transfers, it remains at its current site.

See Also

[Tracking Tools](#)

[Printing Reports](#)

[View Menu](#)

Summary Info

ToolTrax can display a summary of tool files that includes the number of tools, their total value, and the number, percent and value of tools in various conditions. A report can then be printed with the summary info.

To view summary info for a file

1. Choose the custom file from the File menu.
2. Choose Summary Info from the View menu.

To view summary info for a site

1. Choose Tools on Site from the File menu.
2. Select the site that you wish to view.
3. Choose Summary Info - <site name> from the View menu.

To view summary info of all files

In the Tool File window choose Summary Info-All Files from the View menu.

See Also

[Printing Reports](#)

[File Viewer](#)

[View Menu](#)

Window Menu

Cascade

Arranges open windows in an overlapping pattern so that the title bar of each window is visible.

Tile

Arranges open windows side by side so that all windows are visible.

Arrange Icons

Arranges into rows all ToolTrax icons.

List of Windows

The names of all open Tool File windows are listed at the bottom of the Window menu. To bring a window to the top, choose its name from the list.

Warranty

DISCLAIMER OF WARRANTY

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Compression software used for ToolTrax version available on Compuserve:

LHA version 2.13

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Registration and ordering

ToolTrax(TM), Version 3.1

\$49.95 & shipping and handling

US and Canadian Orders		Foreign Orders	
Registration	\$ 49.95	Registration	\$ 49.95
S&H	\$ 5.00	S&H	\$ 8.00
Total	\$ 54.95	Total	\$ 57.95

Make checks or money orders payable to:

Metasoft Corporation

P.O. Box 859

Avon, CO 81620-0859

USA

Name: _____

Company: _____

Address: _____

Telephone: _____

Number of copies: _____ @ \$ _____ = \$ _____

Total enclosed: _____ \$ _____

Circle disk size: 3 1/2" (or) 5 1/4"

Note: Metasoft can make custom modifications of our programs per your specifications. We welcome your inquiries.

Program Support

For Registered users:

If you have any problems, questions, bug reports or suggestions please contact us through the following channels.

COMPUSERVE:

Bill Marshall

CIS ID # 76300,261

MAIL:

Metasoft Corporation

P.O. Box 859

Avon, CO 81620-0859

FAX:

(303) 949-7994

TELEPHONE:

(303) 845-9889 (After 12/1/93)

Introduction

Welcome to ToolTrax!

The purpose of this program is keep track of any kind of tools, equipment and vehicles that you may use. A database with memo file for tools and a database for locations or "sites" where these tools can be found makes the foundation for the program. After you have created the database or inventory with the Tool Card form, several windows on the database allow quick access to tools and easy updating of their locations. An added feature is Scheduled Transfers where you can select tools and designate where they are to be transferred to. Scheduled Transfers keeps this list until you confirm that the transfer was carried out.

Reports can be printed from all the forms, including a Loss Report that lists all tools in a file that are missing, lost or stolen. The Loss Report prints information usually required by insurance carriers for claims. The printed reports can be used as transfer orders, inventory check sheets and catalogs for use in the field as well as the office.

Of course, ToolTrax cannot keep track of your tools without your help. Enter your inventory in the database then update any change in location of tools as they occur. You will then know the location, condition and value of your inventory at a glance. Continue through ToolTrax Help for a complete tour and "how to" lesson.

