TEKLYNX®
BACKTRACK®

U S E R   G U I D E

Setting the Standard
TEKLYNX
BAR CODE SOFTWARE

User Guide

Table of Contents

C H A P T E R 1

The Basics

Overview

BACKTRACK asset and inventory tracking software combines a series of databases, an advanced label designer, and a flexible report generator into the only solution you'll need to keep track of all your items or inventory. It provides an easy way to account for the usage and location of items and inventory through functions such as time and date stamping, reservations, customized reports, and barcoded labels.

The BACKTRACK Databases

BACKTRACK uses five different databases to track the exact location, movement and usage of your items or inventory:

- **User Database:** Contains records for all authorized users of the program
- **Location Database:** Stores information on all of the locations in which items can be stored
- **Item Database:** A database that you build and customize for each of your tracking applications
- **Relationship Database:** Used internally by BACKTRACK to link items to other items (i.e., parent/child relationships)
- **Transaction Database:** Keeps track of all item activity and movement

These databases are the key to BACKTRACK's flexible tracking capabilities. In addition, the ability to import and export popular data formats allows you to share BACKTRACK data with your existing business applications.

Report Designer

BACKTRACK's Report Designer Wizard walks you step by step through the process of creating professional item and inventory reports. Or to create custom reports that are specific to your application or industry, you can use the Advanced Report Designer to customize reports to fit your specific tracking needs.

Label Designer

One of the most powerful features of the BACKTRACK system is its ability to work with any of the three TEKLYNX label design programs (CODESOFT, LABEL MATRIX, LABELVIEW), each program can be installed and used as the Label Design module for BACKTRACK. The TEKLYNX Label Designer of your choice can be used with BACKTRACK to design and print barcoded labels that can be attached to items, used for bin and location shelf labels, made into ID badges, etc. as part of a complete and efficient tracking system.

PDT/Mobile Device Support

The PDT functions in BACKTRACK are designed to be used with supported portable data terminals (PDTs) and Windows mobile devices. The PDT/mobile device functions give you the flexibility and mobility to perform transactions, add items, and carry out physical inventory functions – wherever you are.

What Can BACKTRACK Be Used For?

BACKTRACK's flexibility makes it possible to create tracking solutions for virtually any industry. There are no limits to the number or types of tracking applications that can be created with BACKTRACK. The following list includes just a few of the many types of applications that you can create.

Contact Manager Tracking	Collectable Tracking
Delivery Services	Fixed Asset Tracking
Inventory Tracking	Maintenance Tracking
Off-Site Storage	Perishable Distribution
Perishable Usage	Records Tracking
Rental Tracking	Reservations
Resource Libraries	Reusable Services
Revision Tracking	Safety Inspection
Service Billing	Time & Attendance Tracking

Starting BACKTRACK

1   Click the Start button on the Windows taskbar and move
    the cursor up the list to **All Programs**. Select the
    TEKLYNX program group, then select **BACKTRACK 2015**
    and click **BACKTRACK 2015** to start the program.

2   The first time you open BACKTRACK you will be presented
    with a "Getting Started" screen that offers help for getting
    started and for creating a tracking application. You can
    reference this screen at any time by selecting **Getting
    Started** from the **Help** menu.

3   To get started in BACKTRACK, click on the appropriate
    Main Menu button to access one of its four "modules"
    (Figure 1.1). These modules allow you to access all
    program functions.

Figure 1-1 Main Menu

Note: The text appearing on the four Main Menu buttons
may have been customized by your system administrator or
reseller, and therefore, may differ from the buttons
referenced in this BACKTRACK documentation.

•   **Check In/Out:** (Transaction module) Allows you to perform
    transactions (Check Out, Take Out, Move, etc.) on items or
    inventory.

- **Design/Print Reports:** (Report Designer module) Allows you to define and print reports based on database information.
- **Design/Print Labels:** (Label Designer module) Allows you to design and print labels (including barcodes) for items, locations, users and other uses.
- **Database Maintenance:** (Database Maintenance module) Allows you to manage and maintain the databases associated with BACKTRACK. Also provides access to sessions, PDT functions, and RemoteLink functions.

C H A P T E R **2**

Application Maintenance

Creating a New Application

BACKTRACK provides the New Application Wizard to guide you through the steps for creating a new tracking application.

> **Note:** Any application settings you select in the wizard can be changed at a later time using the **Edit Application Options** window. (See the "Editing an Existing Application" section on page 2-11 for more information).

Step 1 – Name the Application

1   On the **File** menu, click **New Application**.

The New Application Wizard appears displaying the first of seven steps required to create an application.
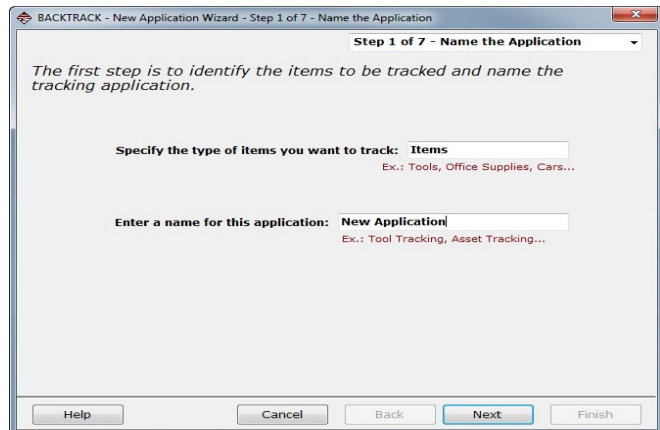
Figure 2-1 Name the Application

2   In the **Specify the type of items you want to track** field, type a general descriptor for the items to be tracked (for example, Files or Tools).

3   In the **Enter a name for this application** field, type a descriptive name (for example, Office File Tracking), and then click **Next**.

Step 2 – Set Tracking Type

Here you specify whether you want the application to support item tracking (each item having a unique ID number) or inventory tracking (multiple quantities of each item).
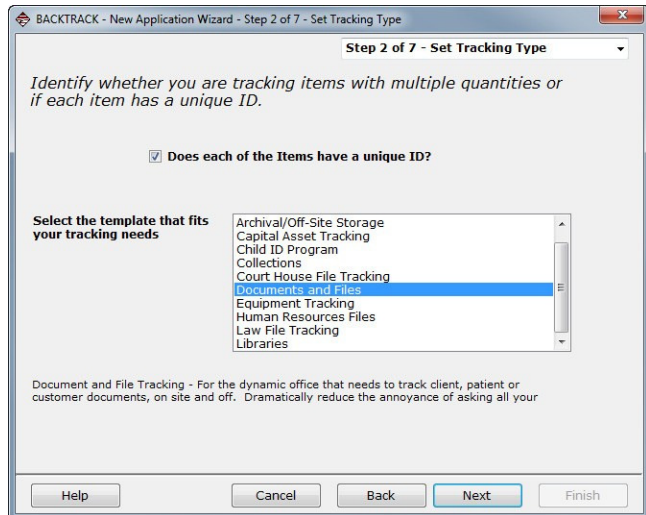
Figure 2-2 Set Tracking Type

1   If you are setting up an item tracking application, select the **Does each of the Files have a unique ID?** check box.

Note: You would clear this check box if you intended to track inventory (quantities of items, such as office supplies) instead of unique items (each having their own identifying number).

2   Select the template that fits your type of tracking application. Note that when you click on a template in the scroll list, a description of that template appears at the bottom of the window.

> To design your application without a template, select **Default–Item Tracking** or **Default–Inventory Tracking**, each of which contains only the standard (system) fields that BACKTRACK requires.

3   Click **Next**.

Step 3 – Define Item Fields

Here you define the structure of your item database. You do this by defining the fields (and their attributes) that will contain the record data.

Defining the structure of a database requires some advance planning. When you design your own application, it is good practice to determine in advance the fields required for each item before attempting to define them here.
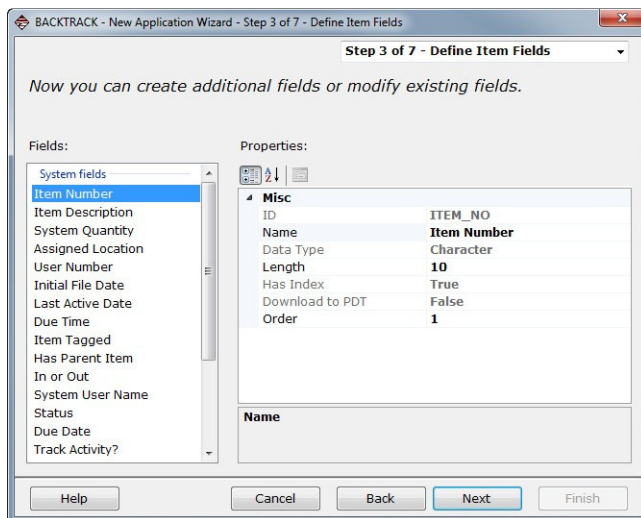
Figure 2-3 Define Item Fields

Note: BACKTRACK provides some system fields that cannot be deleted. You can change the name and length of these fields, but not any other attributes.

1   Modify existing fields using the following item field settings:

- **Field Type:** The type of data allowed in the field (Character, Numeric, Date, Logical, Memo, Picture or Math).

- **Field Length:** The length of the field (number of characters you want to allow in this field).

- **Decimals:** For numeric data, the number of decimal places to the right. For example, enter 2 for two decimal places (0.00) or 3 for three decimal places (0.000).

- **Download to PDT when Adding Items:** This check box is used if you will be adding items using the PDT, and you would like this field to appear as a prompt. Up to 10 fields can be downloaded.

- **Order:** Allows you to specify field order in the item list table. Zero value indicates that the field must be hidden in the list.

2   Click **Next**.

Step 4 – Establish Security Groups

Here you can select a security group and assign or deny access to the application. If you allow access, you can limit users to specific functions.
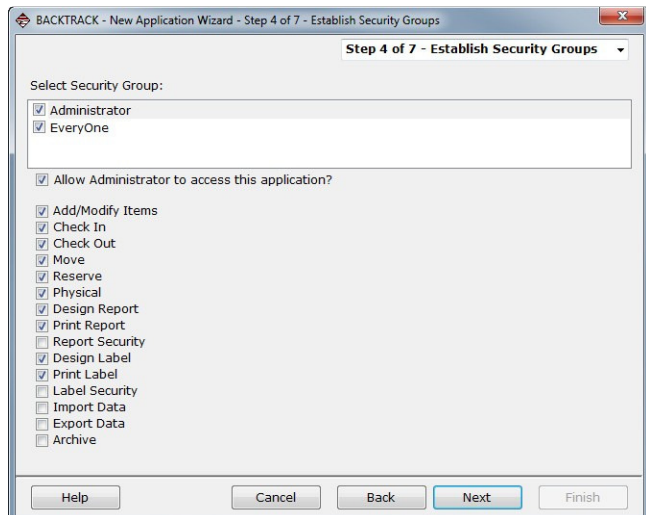
Figure 2-4 Establish Security Groups

1   In the **Select Security Group** list, select a security group.

2   Do one of the following:

   •   To limit access to this application, including all functions displayed on this window, clear the **Allow <Security Group Name> to access this application** check box.

   •   To grant access to this application, select the **Allow <Security Group Name> to access this application** check box. To grant or deny access to specific functions, click the check box next to a function to select (or clear) it.

3   Click **Next**.

Step 5 – Customize Appearance

Here you can customize the application by modifying the text on the Transaction toolbar and Main Menu buttons, and by adding a graphic to the Main Menu display.
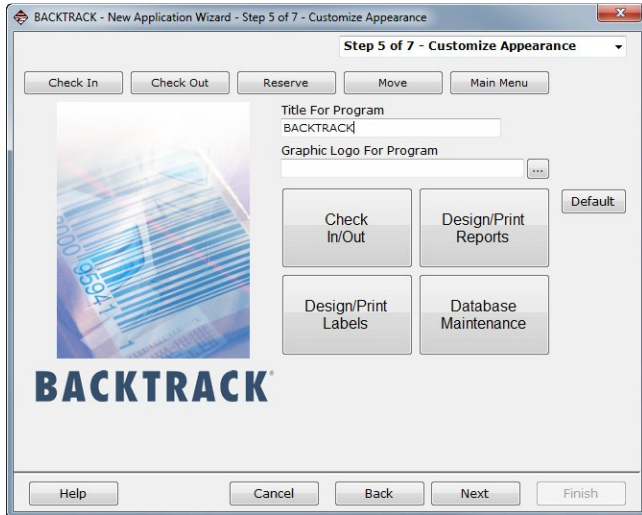
Figure 2-5 Customize Appearance

1   In the **Title For Program** field, type a name for the application (for example, Office File Tracking). This is the name that will appear in the Title bar of the user interface when you have completed setting up this application.

2   If you wish to change the graphic on the Main Menu screen, in the **Graphic Logo For Program** field, enter the directory path and filename or click the **Browse** button to find the graphic file you want to use.

3   If desired, you can change the text on the four Main Menu
    buttons to customize them to your application. For
    example, if you know that DVDs are the only item that will
    be checked in and out, you could click on the large **Check
    In/Out** button and change its text to **DVD In/Out**.

4   To customize the Transaction toolbar, click on the toolbar
    button you wish to change and type the desired text (up to
    11 characters). For example, you could change the **Check
    Out** button to **Check Out DVD**.

5   Click **Next**.

Step 6 – Apply Advanced Settings

Figure 2-6 Apply Advanced Settings

1   If desired, you can set up the following advanced settings:

   •   **Password security on transactions**, which would
       require users to enter a password before performing
       transactions such as Check Out, Take Out, Move, etc.

- • **Download data for lookup/validation** allows you to download item numbers and user-defined fields to the PDT so that they will appear in a drop-down list format for easy lookup and validation.
- • **Automatically assign file IDs**, so that BACKTRACK automatically assigns a unique ID number to each item based on a prefix and starting ID number that you select.

2 Depending on whether you are creating an item tracking application or an inventory tracking application, additional transaction options will be available:

If you are creating an item tracking application, the following options will appear:

- • **Warn on Check In if Currently In/Out** will display an alert if a user attempts to check in a file that is already checked in, or check out a file that is already checked out.
- • **Calculate due date and time**, so that BACKTRACK calculates a due date based on a constant or variable value that you select.

If you are creating an inventory tracking application, the following options will appear:

- • **Allow negative quantities** allows negative quantities of items, as in the case of items being on "back order."
- • **Allow restock to any location** gives you the ability to choose more than one location when restocking inventory.

3 Click **Next**.

Step 7 – Add Item Locations

Here you define the locations in which items will be stored. If you are creating this application using a template, the template will provide a set of default locations where items can be stored.

Defining locations requires some advance planning. When you design your own system, it is good practice to have your locations mapped out in advance and named prior to attempting to define them here.
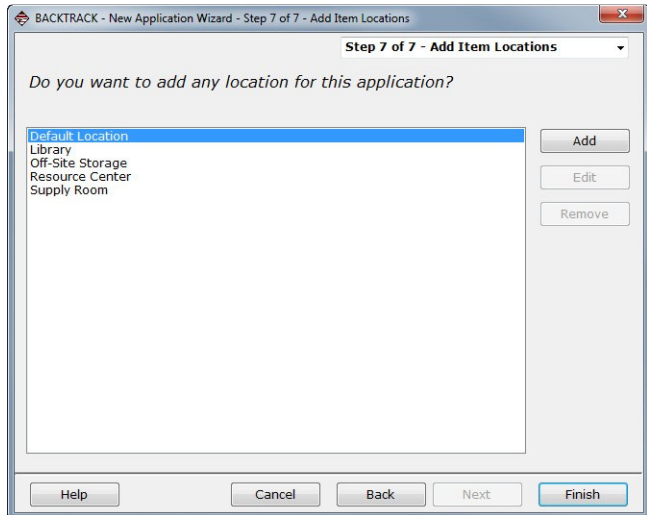
Figure 2-7 Add Item Locations

1   Depending on the template selected in step 1 of the wizard, a set of predefined locations will display under the Existing Locations list. To add more locations, type the location description in the **Location ID** field, and then click the **Add** button.

2   Repeat step 1 for each location you want to add.

3   Click **Finish** to complete the New Application Wizard.

The tracking system is complete. A label is created for you automatically. A prompt appears asking if you want to start adding data files (records) for the new application.
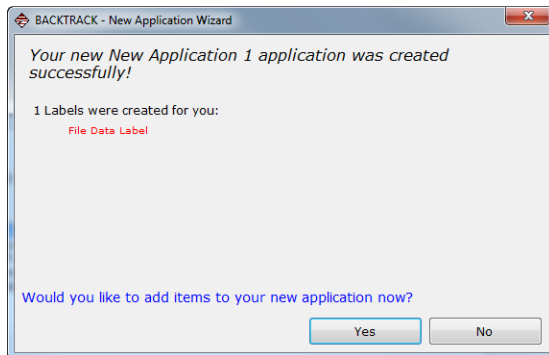
Figure 2-8 Application Created Successfully

Opening an Existing Application

There are three ways to choose an application to open:

- In the **Main Menu** window, select an application from the **Current Application** drop-down list.
- On the **File** menu, click **Open Application**.
- On the Main Menu, click **Database Maintenance**, and then click **Choose Application**.

  Note: Only one application may be open at a time. Opening a new application closes the previous application.

Accessing the Application Maintenance Functions

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Application**.

The **Select an Application for Maintenance** window appears.
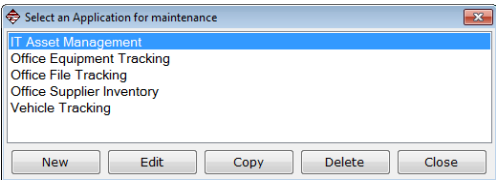
Figure 2-9 Select an Application for Maintenance

Editing an Existing Application

1   Access the **Select an Application for Maintenance** window according to the instructions on page 2-10.

2   Select an application and click **Edit**. window

3   Click **Advanced Edit**.

The **Edit Application Options** window appears.
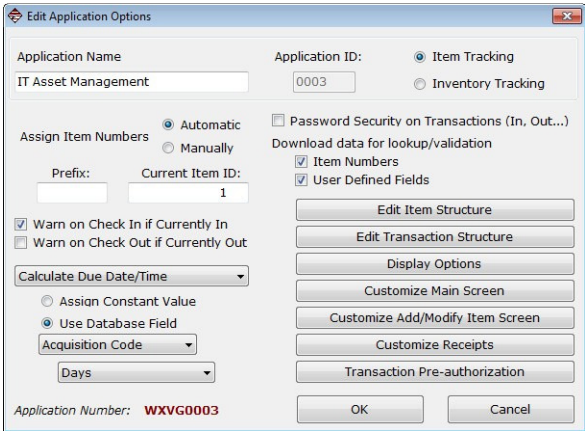
Figure 2-10 Edit Application Options

4   Modify the application as desired by changing any of the
    following application settings.

- **Application Name:** The name of the application.

- **Item Tracking/Inventory Tracking:** Determines the
  application's "mode," which determines the application
  options displayed on this window. See step 5 for
  information on the specific settings available for each
  type of application.

- **Assign Item Numbers:** Determines whether the item
  numbers will be assigned automatically or manually. If
  you choose **Automatic**, enter a **Current Item ID**
  number for BACKTRACK to use as the first item ID (you
  can also enter a prefix to appear at the beginning of
  every item number). If you choose **Manually**, you do not
  need to fill in the Current ID setting here, but will be
  required to enter an item ID as each item is added.

- **Password Security on Transactions:** Requires users
  to enter a password prior to performing transactions
  (Check Out, Take Out, Move, etc.).

  Note: You must also set up your security groups and
  select the appropriate transaction access for each
  group, as described in the "Setting up a security group"
  section on page 3-3.

- **Download data for lookup/validation:** Downloads
  item numbers and user-defined fields to the PDT/mobile
  device so that they will appear in a drop-down list
  format for easy lookup and validation.

  Note: If you have large amounts of data, you may not
  want to download it because there might not be enough
  memory left over on the device to handle your
  transaction data.

5   The other settings available on the **Edit Application
    Options** window will vary depending on if the application is
    set up as an item tracking or inventory tracking application.

Item Tracking Options

Figure 2-11 Edit Application Options - Item Tracking

If you are creating an item tracking application, the following options will appear:

- **Warn on Check In if Currently In/Out:** Displays an alert if a user attempts to check in a file that is already checked in, or check out a file that is already checked out.

- **Calculate Due Date and Time:** BACKTRACK calculates a due date (or check out period) based on a constant or variable value that you select.

Inventory Tracking Options

Figure 2-12 Edit Application Options - Inventory

If you are creating an inventory tracking application, the following options will appear:

- **Allow Negative Quantities:** Allows negative quantities of items, as in the case of items being on "back order."

- **Allow Restock to Any Location:** Gives you the ability to choose more than one location when restocking inventory.

Copying an Application

1   Access the **Select an Application for Maintenance** window according to the instructions on page 2-10.

2   Select the application to be copied and click **Copy**.

    The **Copying Application** window appears.

3   Enter a new name for the application you have chosen to copy. If you want to copy the application structure/settings AND its data, click the **Copy Application with Data** check box.

4   Click **OK**.

Deleting an Application

1   Access the **Select an Application for Maintenance** window according to the instructions on page 2-10.

2   Select the application to be deleted and click **Delete**.

3   When asked to confirm the delete procedure, click **Yes** to delete the application and all of the data used in the application.

Editing the Item Structure

About the Item Database

The Item database is application specific (i.e., each Item database you set up pertains to a specific application). There is one Item database for each application.

You can add, edit or delete certain Item database fields to better suit your specific tracking application. There are two types of fields that you can edit: System fields allow changes to only the field name and length. User-defined fields allow changes to all field structure settings.

Accessing the Item Structure window

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Application**.

The **Select an Application for Maintenance** window appears.

3   Select an application and click **Edit**.

4   Click **Advanced Edit**.

The **Edit Application Options** window appears.

5   Click the **Edit Item Structure** button.

The **Item Structure** window appears.

Figure 2-13 Item Structure

Adding Item Fields

1 Access the **Item Structure** window according to the instructions on page 2-15.

2 Click the **Add** button.

A new field is inserted under User fields. The new field contains the default field settings.

3 Proceed to set up the field using the following Item database field settings:

• **ID:** The Field ID is used as this field's unique identifier in the tracking software. When you insert a new field, a Field ID is created for the field automatically based on the field's name, but you can change the default ID if desired. The Field ID must be eight characters or less with no spaces.

• **Name:** Used to identify this field in all areas of the tracking software program.

- • **Data Type**: Allows you to specify the type of data (Character, Numeric, Date, Logical, Memo or Picture) that can be entered for this field. If the Data Type is set to **Numeric**, you can enter a number for the **Decimals** setting to specify the number of decimal places to be used. You can click the **Math Function** button to set up the field so its data is the result of a mathematical expression.

- • **Length:** Allows you to specify the number of characters allowed in this field.

- • **Has Index:** Set the index option to **True** if you want to be able to sort the records in the Item database by the content of this field. The sort can be done when adding records to the Item database, or when locating an item to perform a transaction (Check Out, Take Out, Move, etc.).

- • **Send to PDT:** Allows you to display additional field information next to the key field throughout the program and on the PDT. If checked, when you scan/select a location on the PDT this field will display, allowing you to view additional information on the location which may be helpful for validation purposes.

- • **Download to PDT:** Allows you to display this field as a PDT prompt if you will be adding items using the PDT.

- • **Order:** Allows you to specify fields order in the item list table. Zero value indicates, that field must be hidden in the list.

4 If desired, set up advanced options on the **Math** / **Input Options** / **Relations** tab:

- • **Math Function:** Allows you to set up a mathematical formula and the tracking software will use the result of the formula as the data for this field. For example, if you have an asset tracking application you could set up an Accumulated Depreciation formula by multiplying a Daily Depreciation Amount field by the difference of the Current Date minus the Initial File Date field. (For more information on using Math Functions, see the BACKTRACK online Help.)

A complete listing of the math functions available in BACKTRACK can be accessed in the program's online Help.

- • **Input Options:** Allows you to specify the type of data or data structure that can be entered into a data record for this field. Using the Input Options, you can set a minimum field length and create an input "mask." A mask allows you to control the type of characters that can be entered for that field (for example, numeric only or alpha only). For more information on using Input Options, see the BACKTRACK online Help.

- • **Add Relation/Edit Relation:** Allows you to relate a field in the tracking software to a field in an external dBase database file. The result of this is that when entering data for a new record, the user will be able to choose from a drop-down list of values that is populated from the external database. For more information on the Relations functions, see the BACKTRACK online Help.

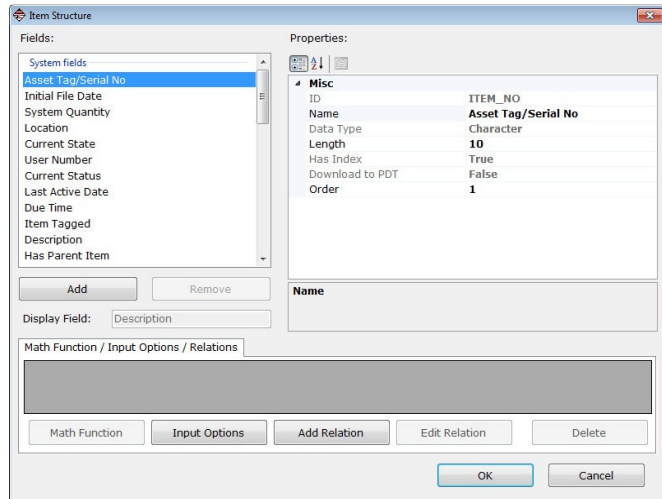5   Click the **OK** button to have BACKTRACK save the changes to the file structure.

Editing Item Fields

1   Access the **Item Structure** window according to the instructions on page 2-15.

2   Select the field you want to edit.

3   Refer to the "Adding Item Fields" section on page 2-16 to change your field settings.

4   Click the **OK** button to have BACKTRACK save the changes to the file structure.

Deleting Item Fields

1   Access the **Item Structure** window according to the instructions on page 2-15.

2   Select the field you want to delete and click **Remove**. (System fields are required and cannot be deleted.)

3   Repeat step 2 as necessary to delete all unwanted fields.

4   Click the **OK** button to have BACKTRACK save the changes to the file structure.

Editing the Transaction Structure

About the Transaction Database

The Transaction database is application specific. There is one Transaction database for each application.

The Transaction database differs from other BACKTRACK databases in that its standard fields are populated automatically as BACKTRACK tracks all the information about item usage and activity (including history and reservations) and logs this information to the Transaction database. The tracking function tags both the user and the item to a specific activity.

BACKTRACK records Check Out, Check In, Take Out, Restock, and Move transactions. You can also track additional information, such as hours used, mileage, purchase order number, reorder date, and reorder quantity, by adding user-defined fields to the Transaction database. The user-defined fields are not populated automatically – they require user input at the time of the transaction.

The user-defined transaction fields you create will appear as prompts when a user attempts to check-out/take-out or check-in/restock items or inventory, requiring the user to enter data at the time of the transaction. For example, if you want to track mileage on company vehicles, you could set up a user-defined transaction field that requires each employee to enter the current mileage when checking in a company car.

Accessing the Transaction Structure window

1 On the Main Menu, click **Database Maintenance**.

   The **Database Maintenance** window appears.

2 Click **Administration Functions**, and then click **Maintain Application**.

   The **Select an Application for Maintenance** window appears.

3 Select an application and click **Edit**.

4 Click **Advanced Edit**.

   The **Edit Application Options** window appears.

5 Click **Edit Transaction Structure**.

   The **Transaction Structure** window appears.
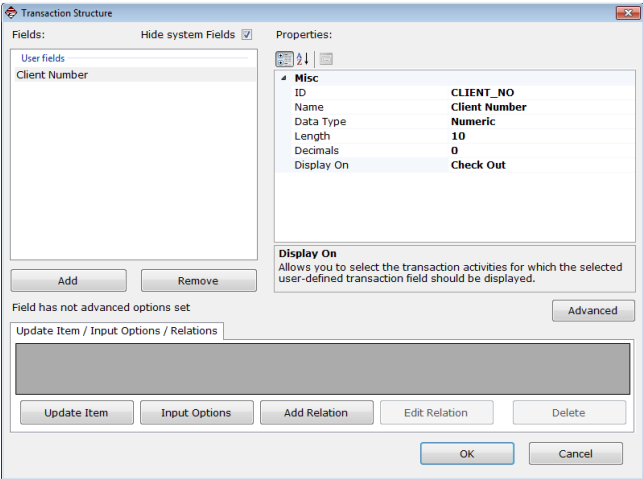
Figure 2-14 Transaction Structure

Adding Transaction Fields

1 Access the **Transaction Structure** window according to the instructions on page 2-20.

2 Click the **Add** button.

A new field is inserted. The new field contains the default field settings.

3   Proceed to set up the field using the following Transaction database field settings:

- **ID:** The Field ID is used as this field's unique identifier in the tracking software. When you insert a new field, a Field ID is created for the field automatically based on the field's name, but you can change the default ID if desired. The Field ID must be eight characters or less with no spaces.

- **Name:** Used to identify this field in all areas of the tracking software program. For a Transaction database field name, this also serves as the text to be used for the prompt that appears at the time of the transaction. For example, if you are tracking mileage on company vehicles, you might want a field name such as **Enter Mileage**, to set this as the prompt to appear when an employee checks in a vehicle after driving it.

- **Data Type:** Allows you to specify the type of data (Character, Numeric, Date, Logical, Memo or Picture) that can be entered for this field. If the Data Type is set to **Numeric**, you can enter a number for the **Decimals** setting to specify the number of decimal places to be used.

- **Length:** Allows you to specify the number of characters allowed in this field.

- **Display On:** Allows you to select the transaction activities for which the selected user-defined transaction field should be displayed. The user will be prompted for input into the user-defined field when the user attempts to perform one of the selected transactions. The transaction activities for which the prompt can be displayed include Check Out/Take Out, Check In/Restock, Move, and Reserve. You can also set the field to display as a PDT prompt when adding items or performing physical inventory using the PDT.

- **Advanced:** Allows you to set criteria for the display prompts and for updating items. For information on setting advanced criteria, see the BACKTRACK online Help.

4 If desired, set up advanced options on the **Update Item/Input Options/Relations** tab:

- **Update Item:** Allows you to use the data entered for the field (during a transaction) to update a corresponding field in the Item database. In order to use the Update Item function, you must first add the corresponding field in the Item database (see the "Adding Item Fields" section on page 2-16). If you are updating a numeric field, you can specify whether the new data collected will replace, add to, or subtract from the existing data in that field. If you are updating a character or memo field, you can replace, insert before, or append to the existing data.

- **Input Options:** Allows you to specify the type of data or data structure that can be entered into a data record for this field. Using the Input Options, you can set a minimum field length and create an input "mask." A mask allows you to control the type of characters that can be entered for that field (for example, numeric only or alpha only). For more information on using Input Options, see the BACKTRACK online Help.

- **Add Relation/Edit Relation:** Allows you to relate a field in the tracking software to a field in an external dBase database file. The result of this is that when entering data for a new record, the user will be able to choose from a drop-down list of values that is populated from the external database. For more information on the Relations functions, see the BACKTRACK online Help.

5 Click the OK button to have BACKTRACK save the changes to the file structure.

Setting Display Options

Once you have created an application, you can select fields to display on the **Locate Item** window.

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Application**.

    The **Select an Application for Maintenance** window appears.

3   Select an application and click **Edit**.

4   Click **Advanced Edit**.

    The **Edit Application Options** window appears.

5   Click the **Display Options** button.

    The **Display Options** window appears.
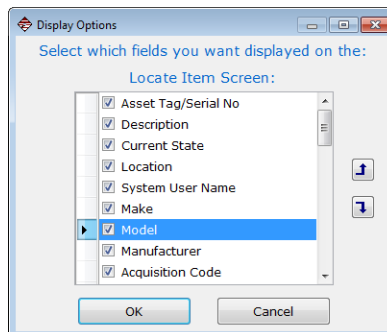
Figure 2-15 Display Options

6   Under the Locate Item Screen list, select the field(s) you would like to appear on screen. You can select (or deselect) a field by clicking on the check box for that field. Those fields with check marks next to them will display on the **Locate Item** window.

7   To reorder the fields, click on any field and drag it to the desired position or highlight a field and click the up or down arrow button to move it.

8   When you have finished selecting and arranging the fields into the desired order, click **OK**.

Customizing the Main Screen

The Customize Main Screen options allow you to customize the Main Menu screen and Transaction toolbar buttons.

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Application**.

The **Select an Application for Maintenance** window appears.

3   Select an application and click **Edit**.

4   Click **Advanced Edit**.

The **Edit Application Options** window appears.

5   Click **Customize Main Screen**.

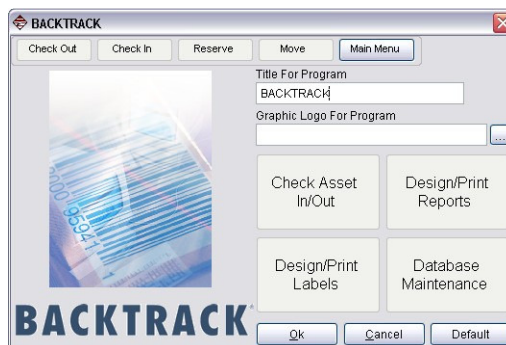The **Screen Customization Settings** window appears.

Figure 2-16 Screen Customization Settings

6   Enter an application name in the **Title for Program** field. This title will appear on all main program title bars when this application is open.

7   If you wish to change the graphic on the Main Menu screen, enter the directory path and file name in the **Graphic Logo for Program** text box or click the **Browse** [...] button and browse to find the graphic file you wish to use.

8   Now you can change the text on the Main Menu buttons to customize them for your application. (The function of each Main Menu button will remain the same.)

9   To customize the Transaction toolbar, click on any of the toolbar buttons located along the top of this window and fill in the desired text (up to 15 characters). (The function of each Transaction toolbar button will remain the same.)

10 When you have finished your customization, click **OK**.

Customizing the Add/Modify Item Screen

Once you have set up the fields in the Item database structure to fit your tracking needs, you can modify the appearance of the Add/Modify Item screen (also called **Item Data File** window) to suit your data entry routine.

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Application**.

The **Select an Application for Maintenance** window appears.

3   Select an application and click **Edit**.

4   Click **Advanced Edit**.

The **Edit Application Options** window appears.

5   Click **Customize Add/Modify Item Screen**.

The **Customize Add/Modify Item Screen** window
appears.
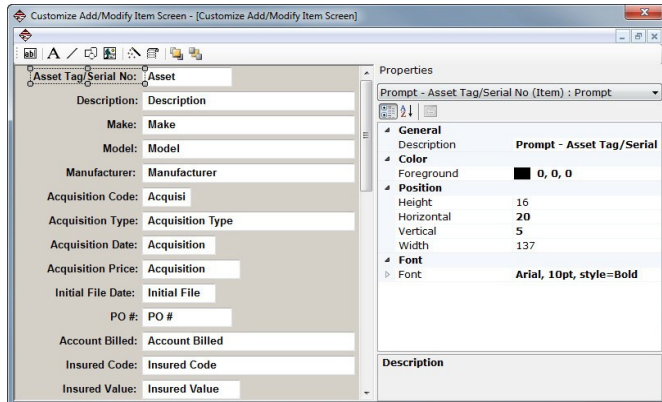
Figure 2-17 Customize Add/Modify Item Screen

6   To reorder the prompts and text boxes, click on an object
with your left mouse button and drag it to the desired
location.

7   Select an object to modify its description, color, positioning,
and font properties.

8   Use the screen customization buttons along the bottom
    toolbar to customize the Add/Modify Item screen.

|abl| **Add Database Prompt/Field:** Add any fields that you previously removed from the screen.

A **Add Text:** Add a text object and set its description, color, positioning, and font properties.

/ **Add Line:** Add lines of varying styles and thickness settings.

Add Shape: Create a shape by setting width, height, border, style, curvature, and color properties.

Add Picture: Insert a picture by specifying a bitmap (.BMP) or icon (.ICO) graphic file.

Set Label Design for Print Label Button: Select
the label to print when you click the **Print Label**
button on the **Item Data File** window.

Screen Customization Wizard: Select the fields
you want to display and set the order in which you
want them to appear.

Bring to Front: Put a Prompt/Field in front of other objects.

Send to Back: Put a Prompt/Field in back of other objects.

Customizing Receipts

After completing a transaction (Check Out, Take Out, Move, etc.), you have the option to print a receipt detailing the transaction. The **Customize Receipts** window allows you to replace the default transaction receipt for each transaction activity with a custom report and/or label.

In order for your custom reports and/or labels to be available for selection in the transaction drop-down lists on the **Customize Receipts** window, you must create them according to the following guidelines:

- **For Reports:** When creating a report to be used as a transaction receipt, you must select the Transaction database as the database to use for the report. You must also save the report in the Advanced Report Designer (you can create the report using the wizard, but you must later edit it and save it using the Advanced Report Designer).
- **For Labels:** When creating a label to be used as a transaction receipt, you must select the Transaction database as the database to use for the label.

To associate receipts (a report and/or label) with transaction activities:

1 On the Main Menu, click **Database Maintenance**.

   The **Database Maintenance** window appears.

2 Click **Administration Functions**, and then click **Maintain Application**.

   The **Select an Application for Maintenance** window appears.

3 Select an application and click **Edit**.

4 Click **Advanced Edit**.

   The **Edit Application Options** window appears.

5 Click **Customize Receipts**.
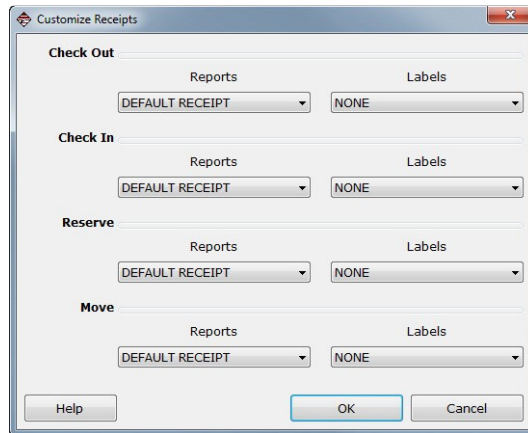
The **Customize Receipts** window appears.

Figure 2-18 Customize Receipts

6   For each transaction, click the drop-down list and select the
    report and/or label that you would like to be available for
    printing after each transaction is completed.

7   Click **OK** when you are finished.

Setting Up Transaction Pre-Authorization

The Transaction Pre-authorization options allow you to set
criteria to determine if a transaction should be authorized. This
is a useful tool in many tracking applications because it can
check the criteria and notify you of the status before the
transaction takes place.

For example, you could stop an item from being checked out to
a user who already has overdue items checked out in his or her
name. You could also authorize a Check Out transaction only if
the person is a member of a particular security group.

The Transaction Pre-authorization options also allow you to
display a message during a transaction if specific criteria are
met. For example, if a user tries to check out an item that is
reserved for use by someone else, you can display an "Item has
a reservation" message (or any message you choose).

To set up pre-authorization for a particular type of transaction:

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Application**.

    The **Select an Application for Maintenance** window appears.

3   Select an application and click **Edit**.

4   Click **Advanced Edit**.

    The **Edit Application Options** window appears.

5   Click **Transaction Pre-authorization**.

    The **Transaction Pre-authorization** window appears.
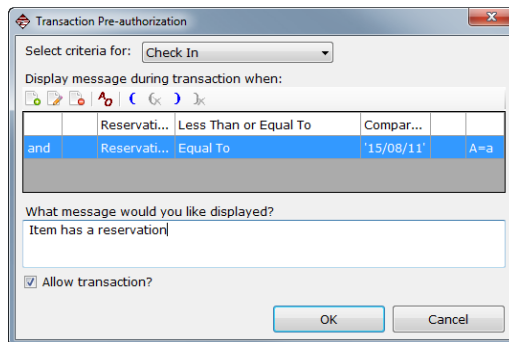
Figure 2-19 Transaction Pre-authorization

6   In the **Select criteria for** drop-down list, select the type of transaction for which you want to require pre-authorization.

7   In the **Display message during transaction when** field, set up criteria to determine when a transaction pre-authorization message should be displayed. For information on setting criteria, see the BACKTRACK online Help.

8   In the **What message would you like displayed?** field,
    type the message to be displayed.

9   Click the **Allow transaction** check box if you want to
    display the message but still allow the user to complete the
    transaction.

10 Click **OK** when you are finished.

CHAPTER **3**

Administration Functions

The Administration Functions include all of the options shown in
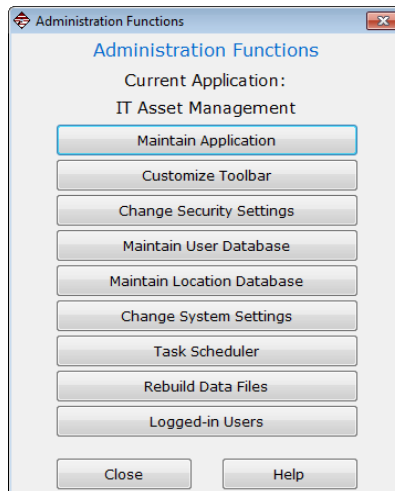Figure 3-1.

Figure 3-1 Administration Functions

Note: The **Maintain Application** functions are covered in
Chapter 2.

Adding a Customized Toolbar

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click
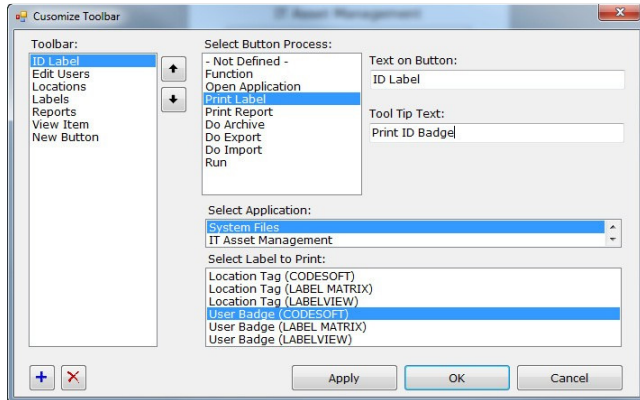**Customize Toolbar**.

The **Customize Toolbar** window appears.

Figure 3-2 Customize Toolbar

3   Click on a New Button toolbar button in the left-most window.

4   Select an option in the **Select Button Process** list. Depending on the process selected, different process settings will appear. Select a function from each list that appears.

5   Enter the text you would like to appear on the button. The text will appear on the highlighted toolbar button as you enter it.

6   Enter a tool tip that describes the function of your customized toolbar button in the **Tool Tip Text** field (for example, if your button text is "Print Label" your tool tip might be "Print Inventory Shelf Label"). This tool tip will appear if you place the cursor over the toolbar button while using the program.

7   Repeat the steps above as necessary until you have finished customizing your toolbar buttons.

8   Click **OK** when you are finished.

Changing Security Settings

The Security Group settings enable you to add new security groups and change settings for existing security groups. You can limit or grant access to various BACKTRACK system files, specific applications, and functions within each application.

Note: Any security group settings you specify will not take effect until you "activate" them.

Step 1 – Setting up a security group:

1   On the Main Menu, click **Database Maintenance**.

     The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Change Security Settings**.

     The **Security Group** window appears.

3   To add a new security group, click the **Add Group** button and enter a name for the group.

4   To grant or deny access to system functions, select the **System** tab and click the check box next to each system function to select it.
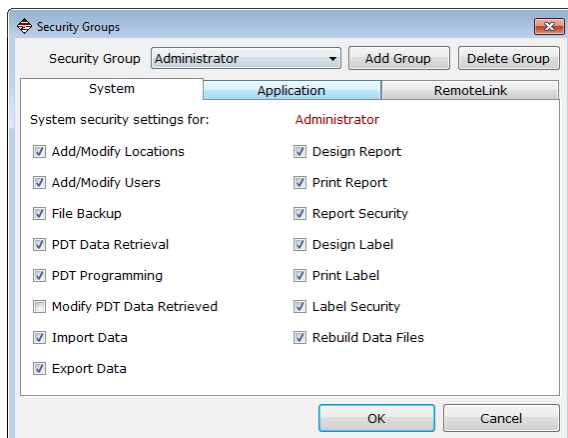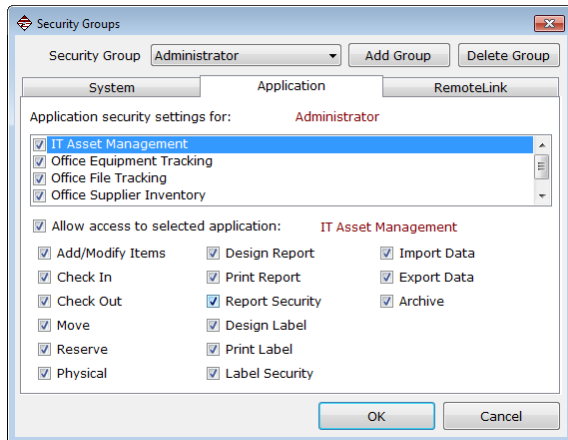
Figure 3-3 Security Groups - System

5   To grant or deny access to application-specific functions, select the **Application** tab, select an application from those listed, and click the check box next to each application function to select it.

Figure 3-4 Security Groups - Application

Note: To organize users into security groups, in the Database Maintenance module select **Add/Modify Data** and then click the **Users** button. Click on the **Security Group** field and select a group for the user.

Step 2 – Activating security groups:

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Change System Settings**.

3   Click the check box next to the **Require User ID/Password for Maintenance** option to activate security.

Step 3 – Activating password security on transactions:

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Application**.

    The **Select an Application for Maintenance** window appears.

3   Select the application for which you want to place security on transactions (Check Out, Take Out, Move, etc.) and click **Edit**.

4   Click **Advanced Edit**.

    The **Edit Application Options** window appears.

5   Click the **Password Security on Transactions** check box to activate security.

> See the "Changing the System Settings" section on page 3-15 for more information on security settings available in BACKTRACK.

Editing the User Structure

About the User Database

The User database is a system-wide database. There is only one User database; its data is shared by all applications.

The User database contains information about all the users who are authorized to use BACKTRACK. When you enter user data into the User database, you can assign the user to a security group that defines the tracking functions the user is allowed to access.

You can add, edit or delete certain User database fields to better suit your company's or organization's user structure. There are two types of fields that you can edit: System fields allow changes to only the field name and length. User-defined fields, on the other hand, allow changes to all field structure settings.

Accessing the Edit User Structure window

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain User Database**.

    The **Maintain User Database** window appears.

3   Click **Edit User Structure**.
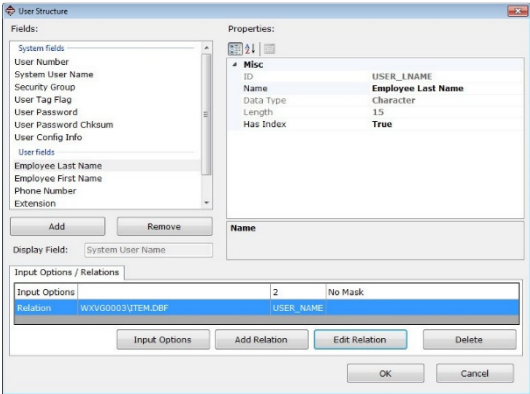
    The **Edit User Structure** window appears.

Figure 3-5 Edit User Structure

Adding User Fields

1   Access the **Edit User Structure** window according to the instructions on page 3-6.

2   Click the **Add** button. A new field is inserted directly above the currently highlighted field. The new field contains the default field settings.

3   Proceed to set up or edit the field using the following User database field settings:

- **ID:** The Field ID is used as this field's unique identifier in the tracking software. When you insert a new field, a Field ID is created for the field automatically based on the field's name, but you can change the default ID if desired. The Field ID must be eight characters or less with no spaces.

- **Name:** Used to identify this field in all areas of the tracking software program. The Field Name is the only field attribute that can be changed for System fields.

- **Data Type:** Allows you to specify the type of data (Character, Numeric, Date, Logical, Memo, or Picture) that can be entered for this field. If the Data Type is set to **Numeric**, you can enter a number for the **Decimals** setting to specify the number of decimal places to be used.

- **Length:** Allows you to specify the number of characters allowed in this field.

- **Has Index:** Set the index option to **True** if you want to be able to sort the records in the User database by the content of this field. The sort can be done when adding records to the User database, or when locating an item to perform a transaction (Check Out, Take Out, Move, etc.).

- **Send to PDT:** Allows you to display additional field information next to the key field throughout the program and on the PDT. If checked, when you scan/select a user on the PDT this field will display, allowing you to view additional information on the user which may be helpful for validation purposes.

4   If desired, set up advanced options on the **Input Options/Relations** tab:

- **Input Options:** Allows you to specify the type of data or data structure that can be entered into a data record for this field. Using the Input Options, you can set a minimum field length and create an input "mask." A mask allows you to control the type of characters that can be entered for that field (for example, numeric only or alpha only). For more information on using Input Options, see the BACKTRACK online Help.

- **Add Relation/Edit Relation:** Allows you to relate a field in the tracking software to a field in an external dBase database file. The result of this is that when entering data for a new record, the user will be able to choose from a drop-down list of values that is populated from the external database. For more information on the Relations functions, see the BACKTRACK online Help.

5 Click **OK** button to have BACKTRACK save changes to the file structure.

Editing User Fields

1 Access the **Edit User Structure** window.

2 Select the field you want to edit.

3 Refer to the "Adding User Fields" section to change your field settings.

4 Click **OK** button to have BACKTRACK save the changes to the file structure.

Deleting User Fields

1 Access the **Edit User Structure** window.

2 Select the field you want to delete and click **Remove**. (System fields are required fields and cannot be deleted.)

3 Repeat step 2 as necessary to delete all unwanted fields.

4 Click **OK** button to have BACKTRACK save changes to the file structure.

Customizing the Add/Modify User Screen

Once you have set up the fields in the User database structure to fit your tracking needs, you can modify the appearance of the Add/Modify User screen (also called **User Data File** window) to suit your data entry routine.

1 On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2 Click **Administration Functions**, and then click **Maintain User Database**.

The **Maintain User Database** window appears.

3   Click **Customize Add/Modify User Screen**.

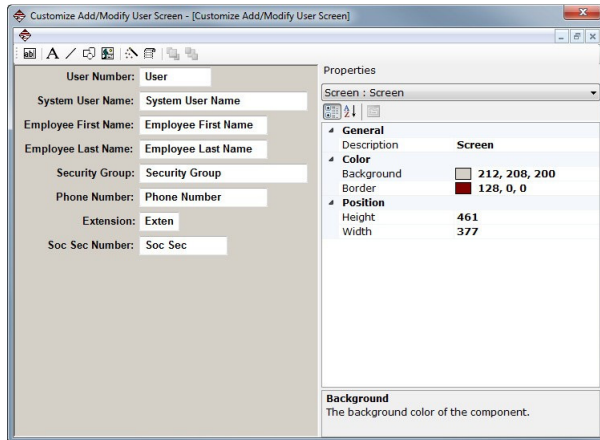The **Customize Add/Modify User Screen** window
appears.

Figure 3-6 Customize Add/Modify User Screen

4   To reorder the prompts and fields, click on an object with
    your left mouse button and drag it to the desired location.

5   Select an object to modify its description, color, positioning,
    and font properties.

6   Use the screen customization buttons along the bottom
    toolbar to customize the **Add/Modify User** screen.

Add Database Prompt/Field: Add any fields that
you previously removed from the screen.

Add Text: Add a text object and set its description,
color, positioning, and font properties.

Add Line: Add lines of varying styles and thickness
settings.

Add Shape: Create a shape by setting width, height,
border, style, curvature, and color properties.

Add Picture: Insert a picture by specifying a bitmap (.BMP) or icon (.ICO) graphic file.

Set Label Design for Print Label Button: Select the label to print when you click the **Print Label** button on the Add/Modify User Screen.

Screen Customization Wizard: Select the fields you want to display and set the order in which you want them to appear.

Bring to Front: Put a Prompt/Field in front of other objects.

Send to Back: Put a Prompt/Field in back of other objects.

Editing the Location Structure

About the Location Database

The Location database stores information on all of the locations that are available. There is only one Location database; its data is shared by all applications.

A location is defined in the Location database to indicate a place where items or inventory can be found. For example, tools in an equipment tracking application might be stored in locations such as Tool Cart #1, Rack 10, or Storage Room C. A unique item can also be a location, and serves as a parent item for the items that are stored in it. For example, Toolbox A (an item) can be defined as a location for other items (such as tools).

You can add, edit or delete certain Location database fields to better suit the types of locations in your company or organization. There are two types of fields that you can edit: System fields allow changes to only the field name and length. User-defined fields, on the other hand, allow changes to all field structure settings.

Accessing the Edit Location Structure window

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Location Database**.

The **Maintain Location Database** window appears.

3   Click **Edit Location Structure**.
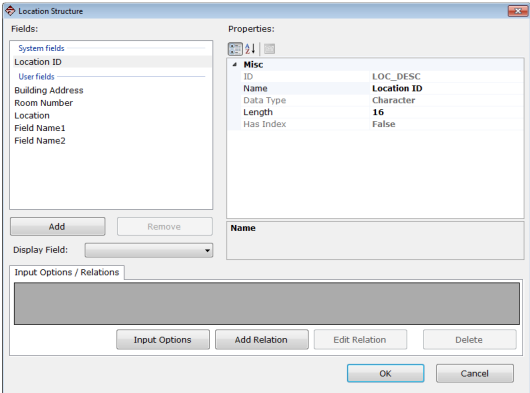
The **Edit Location Structure** window appears.

Figure 3-7 Edit Location Structure

Adding Location Fields

1   Access the **Edit Location Structure** window.

2   Click the **Add** button. A new field is inserted directly above the currently highlighted field. The new field contains the default field settings.

3   Proceed to set up or edit the field using the following Location database field settings:

•   **ID:** The Field ID is used as this field's unique identifier in the tracking software. When you insert a new field, a Field ID is created for the field automatically based on the field's name, but you can change the default ID if desired. The Field ID must be eight characters or less with no spaces.

- **Name:** Used to identify this field in all areas of the tracking software program. The Field Name is the only field attribute that can be changed for System fields.

- **Data Type:** Allows you to specify the type of data (Character, Numeric, Date, Logical, Memo, or Picture) that can be entered for this field. If the Data Type is set to **Numeric**, you can enter a number for the **Decimals** setting to specify the number of decimal places to be used.

- **Length:** Allows you to specify the number of characters allowed in this field.

- **Has Index:** Set the index option to **True** if you want to be able to sort the records in the Location database by the content of this field. The sort can be done when adding records to the Location database, or when locating an item to perform a transaction (Check Out, Take Out, Move, etc.).

- **Display Field:** Allows you to display this field along with the key location field. Doing so provides users with information about the location whenever the location is displayed.

- **Send to PDT:** Allows you to display additional field information next to the key field throughout the program and on the PDT. If checked, when you scan/select a location on the PDT this field will display, allowing you to view additional information on the location which may be helpful for validation purposes.

4 If desired, set up advanced options on the **Input Options/Relations** tab:

- **Input Options:** Allows you to specify the type of data or data structure that can be entered into a data record for this field. Using the Input Options, you can set a minimum field length and create an input "mask." A mask allows you to control the type of characters that can be entered for that field (for example, numeric only or alpha only). For more information on using Input Options, see the BACKTRACK online Help.

- **Add Relation/Edit Relation:** Allows you to relate a field in the tracking software to a field in an external dBase database file. The result of this is that when entering data for a new record, the user will be able to choose from a drop-down list of values that is populated from the external database. For more information on the Relations functions, see the BACKTRACK online Help.

5   Click **OK** button to have BACKTRACK save changes to the file structure.

Editing Location Fields

1   Access the **Edit Location Structure** window according to the instructions on page 3-10.

2   Refer to the "Adding Location Fields" section on page 3-11 to change your field settings.

3   Click **OK** button to have BACKTRACK save changes to the file structure.

Deleting Location Fields

1   Access the **Edit Location Structure** window according to the instructions on page 3-10.

2   Select the field you want to delete and click **Remove**. (System fields are required fields and cannot be deleted.)

3   Repeat step 2 as necessary to delete all unwanted fields.

4   Click **OK** button to have BACKTRACK save changes to the file structure.

Customizing the Add/Modify Location Screen

Once you have set up the fields in the Location database structure to fit your tracking needs, you can modify the appearance of the Add/Modify Location screen (also called **Location Data File** window) to suit your data entry routine.

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Maintain Location Database**.

The **Maintain Location Database** window appears.

3   Click **Customize Add/Modify Location Screen**.

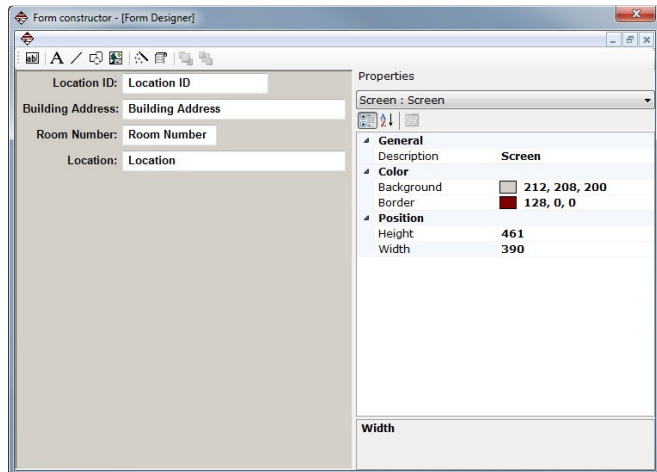The **Customize Add/Modify Location Screen** window
appears.

Figure 3-8 Customize Add/Modify Location Screen

4   To reorder the prompts and fieldes, click on an object with
your left mouse button and drag it to the desired location.

5   Select an object to modify its description, color, positioning,
and font properties.

6 Use the screen customization buttons along the bottom toolbar to customize the Add/Modify Location screen.

abl **Add Database Prompt/Field:** Add any fields that you previously removed from the screen.

A **Add Text:** Add a text object and set its description, color, positioning, and font properties.

/ **Add Line:** Add lines of varying styles and thickness settings.

Add Shape: Create a shape by setting width, height, border, style, curvature, and color properties.

Add Picture: Insert a picture by specifying a bitmap (.BMP) or icon (.ICO) graphic file.

Set Label Design for Print Label Button: Select the label to print when you click the **Print Label** button on the Add/Modify Location Screen.

Screen Customization Wizard: Select the fields you want to display and set the order in which you want them to appear.

Bring to Front: Put a Prompt/Field in front of other objects.

Send to Back: Put a Prompt/Field in back of other objects.

Changing the System Settings

The System Settings allow you to define how you would like your BACKTRACK system to work. Changes made here are system wide, affecting all applications.

1 On the Main Menu, click **Database Maintenance**.

   The **Database Maintenance** window appears.

2 Click **Administration Functions**, and then click **Change System Settings**.

The **System Settings** window appears.
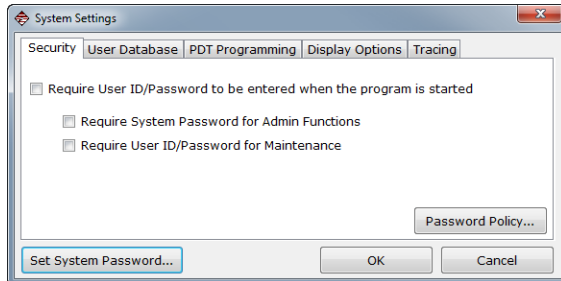
Figure 3-9 System Settings - Security Tab

3   On the **Security** tab, check the **Require User ID/Password to be entered when the program is started** field if you want to place password security on the program.

4   Check the **Require System Password for Admin Functions** field to require users to enter a system password in order to access the Administration Functions.

5   Check the **Require User ID/Password for Maintenance** field to activate any security groups that have been created. When using the Database Maintenance functions, users will be restricted to the options that their security group allows.

6   Click the **Password Policy** button on the **Security** tab.

The **Password Policy** window appears.
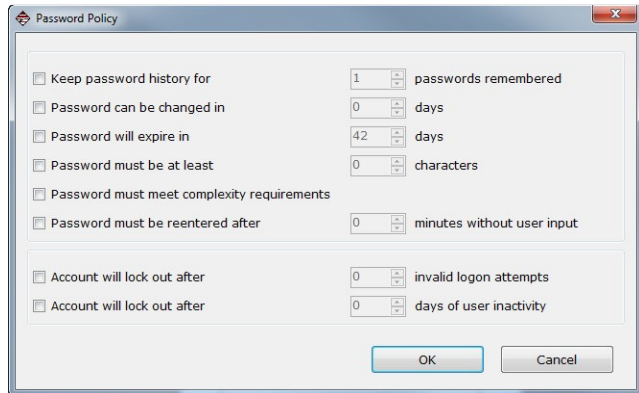
Figure 3-10 Password Policies

7   Use the options on the **Password Policy** window to set up all needed rules and requirements for password usage within the program.

8   Click the **User Database** tab.
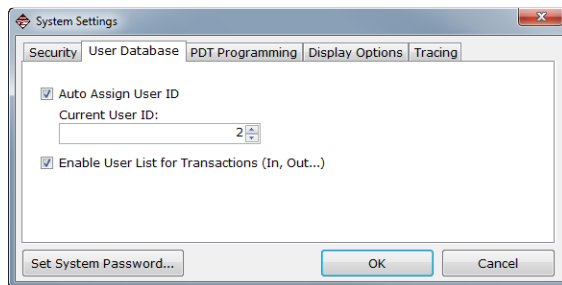
Figure 3-11 System Settings - User Database Tab

9   Check the **Auto Assign User ID** field if you want BACKTRACK to automatically assign a unique User ID number when a new user is added. Then enter a Current User ID number for BACKTRACK to use as the first user ID.

10 The **Enable User List for Transactions** option enables users to search for and select a user name by clicking the **List** button located on the Check In/Out, Restock/Take Out, Reservations, or Move windows. You can also disable this option as a form of security, requiring users to know and enter (or scan) their own user ID in order to perform transactions.

11 Click the **Display Options** tab.
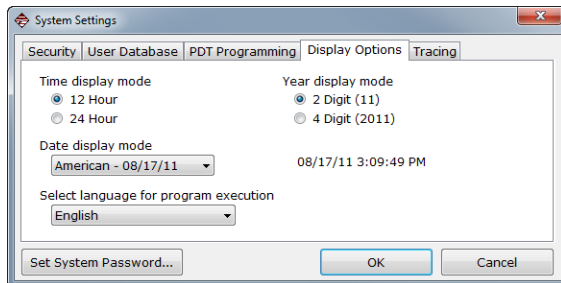
Figure 3-12 System Settings - Display Options Tab

12 Select the type of time display you want to use. The **12 Hour** option sets the clock with two 12-Hour periods. The **24 Hour** option sets the clock for a single 24-hour day.

13 Set the year display to either a **4 Digit** or a **2 Digit** year display.

14 Specify the type of date display to use in BACKTRACK (MM/DD/YY, YY.MM.DD, etc.).

15 The **Select Language for Program Execution** list allows you to select a language in which to run BACKTRACK.

16 Click the **PDT Programming** tab.
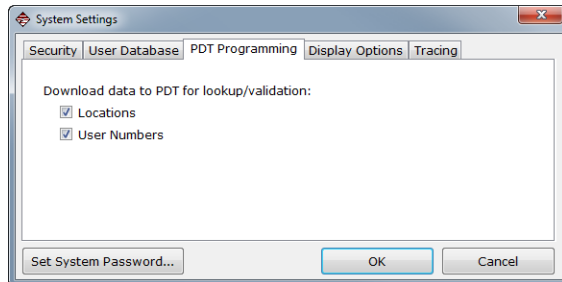
Figure 3-13 System Settings – PDT Programming Tab

17 The **Download to PDT for lookup/validation** settings allow you to download Location and User Number data to your PDT. The data will appear on the PDT in drop-down list format, which makes it easier for lookup/validation.

18 To set or change the system password, which is used to limit access to the Database Maintenance functions, click the **Set System Password** button (bottom-left corner of the **System Settings** window) and type the desired password.

19 Click **OK** when you are finished.

20 Click the **Tracing** tab.
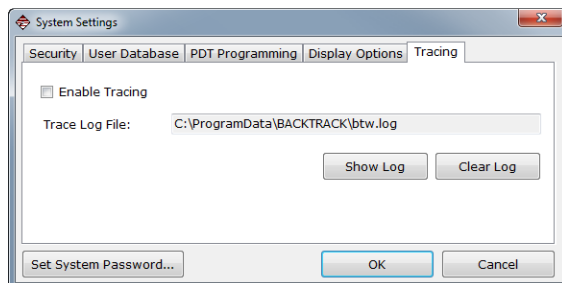
Figure 3-14 System Settings - Tracing Tab

21 Check the **Enable Tracing** field if you want BACKTRACK to automatically log the system actions. Then click **Show Log** button to create the log file or **Clear Log** button to clean up the file.

22 Click **OK** when you are finished.

Using the Task Scheduler

BACKTRACK's Task Scheduler allows you to schedule timed functions to run regularly and/or every time you start the BACKTRACK program. The timed functions allow any toolbar function to be operated at specific times of the day while any workstation running the BACKTRACK program is operational.

> **Note:** Since BACKTRACK is a network product, the first computer on the network that has the availability to run the timed function executes the operation. This means that any external programs that are run must be available to all computers on the network.

You can set up Task Scheduler to regularly perform timed functions such as print a report, print a label, import/export data, etc.

To schedule tasks in BACKTRACK:

1 On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2 Click **Administration Functions**, and then click **Task Scheduler**.

3 Click **Add**.

The **BACKTRACK: Scheduled Tasks** window appears.
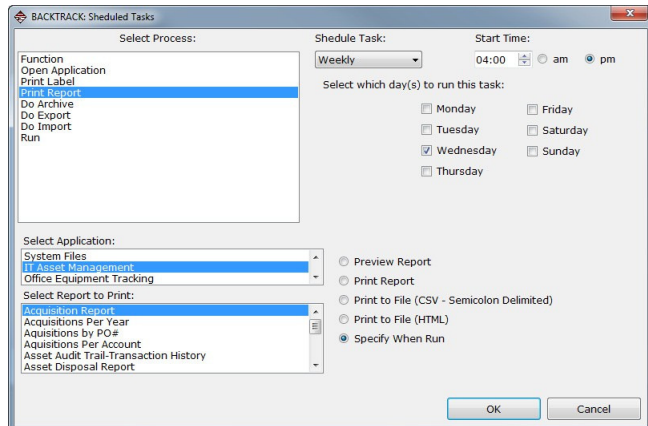
Figure 3-15 Task Scheduler

4   In the **Select Process** list, select the process/task you
    would like to schedule.

5   Depending on the process selected, different process
    settings will appear below the **Select Process** list. Select a
    function from each list that appears.

6   Use the **Schedule Task** and **Start Time** settings to specify
    how often you would like the process to occur.

7   Click **OK** when you are finished.

Rebuilding Data Files

The Rebuild Data Files functions enable you to rebuild indexes
and verify the integrity of all database files. Periodic use of these
functions ensures that deleted records are removed and
remaining records are renumbered to optimize database
performance.

To rebuild data files:

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Administration Functions**, and then click **Rebuild Data Files**.

3   To continue, click **OK**.

Viewing Logged-in Users

The **Logged-in Users** window allows you to view a list of users currently logged-in to BACKTRACK. The information displayed includes the User Number, User Name, Host, Login, and Login Time.

To access the Logged-in Users window:

•   In the Database Maintenance module, click on **Administration Functions** and then select **Logged-in Users**.

Adding & Modifying Data

The Add/Modify Data functions allow you to enter the item,
location, and user data to be tracked.

Items

Accessing the Edit Item Screen

1 On the Main Menu, select the application that contains the
Item database you want to modify.

2 Click **Database Maintenance**.

The **Database Maintenance** window appears.

3 Click **Add/Modify Data**, and then click **Items**.

The **Edit Item** data entry form appears with the Edit Item
toolbar.

Figure 4-1 Edit Item

Figure 4-2 Edit Item Toolbar

**Adding a
New Item**

1 Access the **Edit Item** data entry form according to the
   instructions on page 4-1.

2 Click **Add Record** ▯ on the Edit Item toolbar.

3 Specify whether the item should be assigned to a specific
   location (select that location) or a parent item (a parent item
   is a relationship to the item as well as the "place" the item
   will be stored) and click **OK**.

   Note: An inventory item cannot be assigned as a parent
   item, but it can be a child item.

4 Fill in the field information for the new item.

5 Repeat steps 2 through 4 for each item you want to add.

6 When you are finished, click **Save/Close** 🖫 .

   To print a label after each new item is entered
   from this screen, you must attach a label design
   by clicking the **Customize Add/Modify Item
   Screen** button on the **Edit Application Options**
   window. Then select the **Set Label Design for
   Print Label Button** option to select a
   pre-designed label format.

Editing an Item

1   Access the **Edit Item** data entry form according to the instructions on page 4-1.

2   Click **Find** 🔍 on the Edit Item toolbar to locate the item to be edited.

3   Edit the field information displayed.

4   Repeat steps 2 and 3 for each item you wish to edit.

5   When you are finished, click **Save**/**Close** 💾.

Deleting an Item

1   Access the **Edit Item** data entry form according to the instructions on page 4-1.

2   Click **Find** 🔍 on the Edit Item toolbar to locate the item to be deleted.

Note: You cannot delete an item if the item is currently checked out or if it is a parent item.

3   Click **Delete Record** ✕ on the Edit Item toolbar.

4   Repeat steps 2 and 3 for each item you wish to delete.

5   When you are finished, click **Save**/**Close** 💾.

Locations

Accessing the Edit Location Screen

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Add**/**Modify Data**, and then click **Locations**.

The **Edit Location** data entry form appears, along with the Edit Location toolbar.
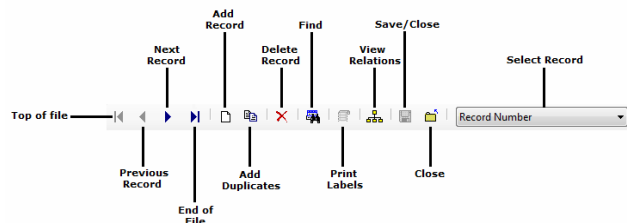
Figure 4-3 Edit Location

Figure 4-4 Edit Location Toolbar

Adding a New Location

1   Access the **Edit Location** data entry form according to the instructions on page 4-3.

2   Click **Add Record** ▯ on the Edit Location toolbar.

3   Fill in the field information for the new location.

4   Repeat steps 2 and 3 to add all locations.

5   When you are finished, click **Save**/**Close** 💾 .

Editing a Location	1	Access the **Edit Location** data entry form according to the instructions on page 4-3.
	2	Click **Find** 🔍 on the Edit Location toolbar to locate the location to be edited.
		Note: You cannot edit a location if it currently contains an item.
	3	Edit the field information displayed.
	4	Repeat steps 2 and 3 for each location you wish to edit.
	5	When you are finished, click **Save**/**Close** 💾 .
Deleting a Location	1	Access the **Edit Location** data entry form according to the instructions on page 4-3.
	2	Click **Find** 🔍 on the Edit Location toolbar to locate the location to be deleted.
		Note: You cannot delete a location if it currently contains an item. You must first move the item to a new location.
	3	Click **Delete Record** ✕ on the Edit Location toolbar.
	4	Repeat steps 2 and 3 for each location you wish to delete.
	5	When you are finished, click **Save**/**Close** 💾 .

Users

Accessing the Edit User Screen	1	On the Main Menu, click **Database Maintenance**.
		The **Database Maintenance** window appears.
	2	Click **Add**/**Modify Data**, and then click **Users**.window

The **Edit User** data entry form appears, along with the Edit User toolbar.
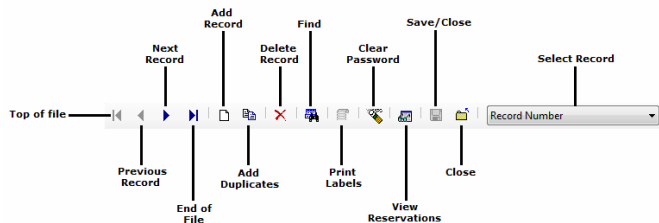

Figure 4-5 Edit User

Figure 4-6 Edit User Toolbar

Adding a New User

1   Access the **Edit User** data entry form according to the instructions on page 4-5.

2   Click **Add Record** ⬜ on the Edit User toolbar.

3   Fill in the user information for each field.

4   Repeat steps 2 and 3 for each new user.

5   When you are finished, click **Save**/**Close** 🖫 .

> To print a label after each new user is entered from this screen, you must attach a label design by selecting the **Customize Add/Modify User Screen** option from the Administration Functions. Then select the **Set Label Design for Print Label Button** option to attach your pre-designed label format.

Editing a User

1   Access the **Edit User** data entry form according to the instructions on page 4-5.

2   Click **Find** 🖼 on the Edit User toolbar to locate the user to be edited.

3   Edit the user information fields as desired.

4   Repeat steps 2 and 3 for each user you wish to edit.

5   When you are finished, click **Save**/**Close** 🖫 .

Deleting a User

1   Access the **Edit User** data entry form according to the instructions on page 4-5.

2   Click **Find** 🖼 on the Edit User toolbar to locate the user to be deleted.

    Note: You cannot delete a user if the user currently has items checked out or has an active reservation. In order to delete the user you must first check in the items or delete the reservation.

3   Click **Delete Record** ✕ on the Edit User toolbar.

4   Repeat steps 2 and 3 for each user record you wish to delete.

5   When you are finished, click **Save**/**Close** 🖫 .window.

Transfer Functions

The Transfer Functions allow the transfer of files and data to and from a BACKTRACK application.
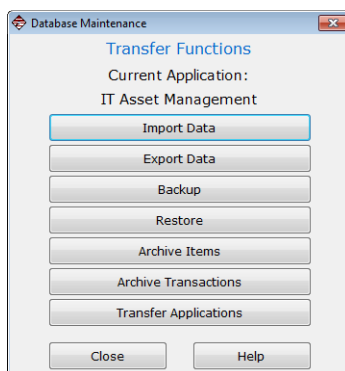

Figure 5-1 Transfer Functions

Importing Data

The Import Data function allows you to retrieve data from an existing file and import it into a BACKTRACK database. This feature is useful if the data you want to use in BACKTRACK already exists in another format; thus, saving the time that it would take to re-key that information.

Note: Make sure that your application contains an adequate number of fields to accommodate all of the data that you plan to import. You should also ensure that your field type and length settings will work with the new data.

Accessing the Select Import window

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click the **Transfer Functions**, and then click **Import Data**.

    The **Select Import** window appears.
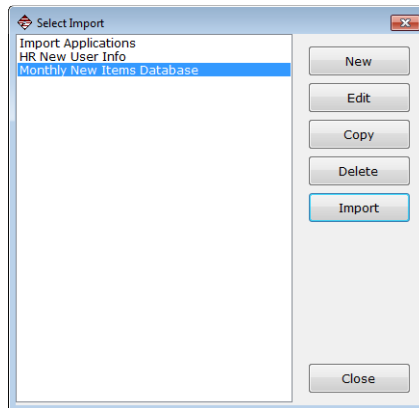

Figure 5-2 Select Import

Creating a New Import

1   Access the **Select Import** window according to the instructions on page 5-2.

2   Click **New**.

    The **New Import** window appears.
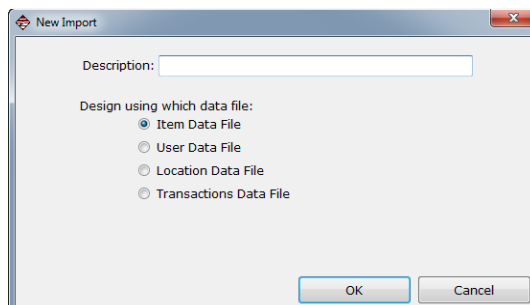
Figure 5-3 New Import

3   In the **Description** field, type an identifying name for this import.

4   Select the appropriate data file to use for this import, and click **OK**.

The **Import Data** window appears.
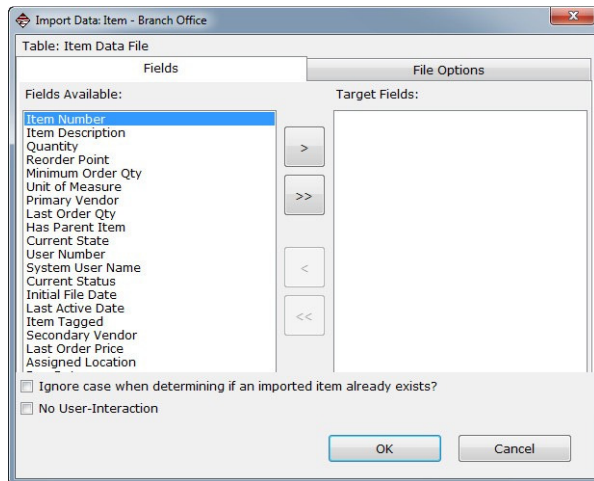
Figure 5-4 Import Data – Fields Tab

5   Click on an application field name in the **Fields Available** list, then use the arrow buttons to move it over to the **Target Fields** list. Repeat this step for each field you want to include in the import.

6   Click the **File Options** tab.
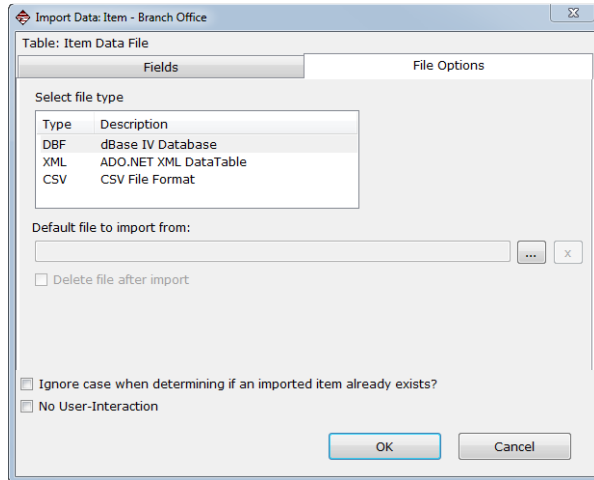
Figure 5-5 Import Data - File Options Tab

7   In the **Select file type** list, select the file format of the file you plan to import.

8   Designate the default file to import from by typing a file name or clicking the **Browse** button to locate the file.

9   Check the **Delete file after import** option if the file you are importing is a temporary file.

10 Check the **Ignore case** check box if you want the program to ignore the case (uppercase or lowercase) when determining if an imported item already exists.

11 To perform the import operation with a minimal amount of user interface screens appearing, click the **No User-Interaction** check box located at the bottom of the window.

12 Click **OK** to return to the **Select Import** window.

Importing Data

1   Access the **Select Import** window according to the instructions on page 5-2.

2   Select the desired import to use to import data and click **Import**.

3   If you did not previously specify a default file to import from on the **File Options** tab, the **Open** window appears. Select the file from which to import data, and click **OK**.

    The **Import Data** window appears displaying a preview of the import.

4   If the preview is correct, click **Import**. If changes are necessary, click **Cancel**.

    Note: Care must be taken when importing data into BACKTRACK, as the database files used by BACKTRACK expect specific types of data in certain fields (for example, user ID fields accept only numeric data). BACKTRACK will try to change the imported data to the correct data type (numeric, alpha, or character) for the field into which the data is being imported.

Editing an Existing Import

1   Access the **Select Import** window according to the instructions on page 5-2.

2   Select the import you want to edit and click **Edit**.

    The **Import Data** window appears.

3   Refer to the import options covered in the "Creating a New Import" section on page 5-2 to change the setup for this import.

Copying an Import

1   Access the **Select Import** window according to the instructions on page 5-2.

2   Select the import you want to copy and click **Copy**.

    The **Copy: <Import>** window appears.

3   In the **To New Name** field, type the name to use for the import copy.

4   Click **OK**.

The new import will now be available in the list of existing imports if you would like to edit it.

Note: If an import you want to copy is based on an application-specific database (Item or Transaction database) you can save it for use with a different application by selecting the application from the **Application** drop-down list. If you do so, it is best to select another application whose database uses the same fields as those present in the original import.

Deleting an Import

1   Access the **Select Import** window according to the instructions on page 5-2.

2   Select the import you want to delete and click **Delete**.

A prompt appears asking you to confirm your selection.

3   Click **Yes** to delete the import.

Exporting Data

The Export Data function enables you to extract information from a BACKTRACK database for use in another software program. For example, you could export data from the Transaction database into a spreadsheet application to analyze item usage trends, determine patterns in user transactions, or tie the exported data into an existing accounting system.

Accessing the Select Export window

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click the **Transfer Functions**, and then click **Export Data**.
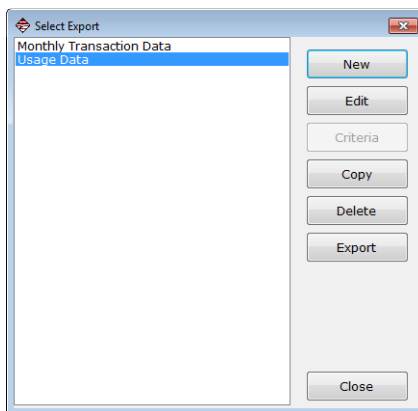
The **Select Export** window appears.

Figure 5-6 Select Export

Creating a New Export

1   Access the **Select Export** window according to the instructions on page 5-6.

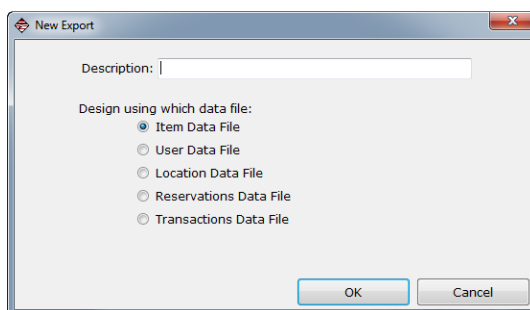2   Click **New**.

The **New Export** window appears.

Figure 5-7 New Export

3   In the **Description** field, type an identifying name for this export.

4   Select the desired data file to use for this export, and click
    OK.

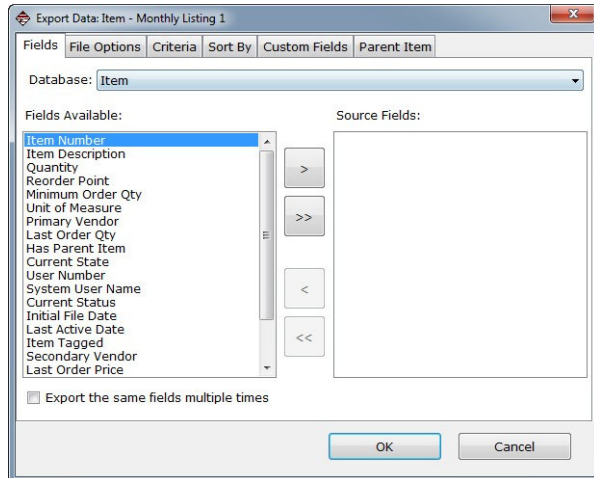   The **Export Data** window appears.

Figure 5-8 Export Data - Fields Tab

5   On the **Fields** tab, click on an application field name in the
    Fields Available list, then use the arrow buttons to move
    the field name over to the **Source Fields** list. Repeat this
    step for each field you want to include in the export.
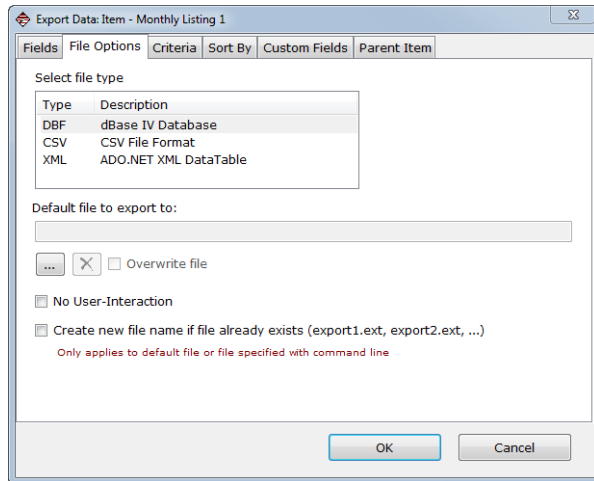
6   Click the **File Options** tab.

Figure 5-9 Export Data - File Options Tab

7   Select a file type from those listed and specify the default file to export to by typing a file name or clicking the **Browse** button to locate the file.

Note: Memo fields can be exported in dBase (.DBF) format only.

8   Check the **Overwrite file** option to replace the existing file (if you are exporting to an existing file).

9   To perform the export operation with a minimal amount of user interface screens appearing, click the **No User-Interaction** check box.

10 If you want the program to automatically generate a sequentially numbered file name for each export, check the **Create new file name…** check box.

Note: To use this option you must also be sure to specify a default file name for the program to append to when generating the sequentially numbered file names.

For example, if you use export.txt as the default, the automatically generated file names will be export1.txt, export2.txt, etc.

11 If desired, you can set up additional export options using the **Criteria**, **Sort By**, **Custom Fields**, and **Parent Item** tabs.

- **Criteria tab:** Set up selection criteria to limit the scope of the data that is exported; BACKTRACK will check the records against that criteria to determine which records should be included in the export. For information on setting criteria, see the BACKTRACK online Help.

- **Sort By tab:** Select the field(s) to sort by, the type of sort (Ascending or Descending), and the order of the sort (if multiple fields are selected).

- **Custom Fields tab:** Define custom fields that consist of multiple existing fields, and logic or other expressions. For example, if you have a Quantity field and a Price field in your database, you could create an expression where the Quantity is multiplied by the Price to give a resulting value that will be included in your export.

- **Parent Item tab:** Specify the data to be exported for a location field when the location is a parent item.

12 Click **OK** to return to the **Select Export** window.

Exporting Data

1 Access the **Select Export** window according to the instructions on page 5-6.

2 Select the desired export to use to export data and click **Export**.

3   If you did not previously specify a default file to export to on the **File Options** tab, select the file from which you would like to export and click **Save**.

BACKTRACK processes the export and displays a message when the process is complete.

Editing an Existing Export

1   Access the **Select Export** window according to the instructions on page 5-6.

2   Select the export you want to edit and click **Edit**.

The **Export Data** window appears.

3   Refer to the export options covered in the "Creating a New Export" section on page 5-7 to change the setup for this export.

Copying an Export

1   Access the **Select Export** window according to the instructions on page 5-6.

2   Select the export you want to copy and click **Copy**.

The **Copy: <Export>** window appears.

3   In the **To New Name** field, type the name to use for the export copy.

4   Click **OK**.

The new export will now be available in the list of existing exports if you would like to edit it.

Note: If an export you want to copy is based on an application-specific database (Item or Transaction database) you can save it for use with a different application by selecting the application from the **Application** drop-down list. If you do so, it is best to select another application whose database uses the same fields as those present in the original export.

Deleting an Export

1   Access the **Select Export** window according to the instructions on page 5-6.

2   Select the export you want to delete and click **Delete**.

    A prompt appears asking you to confirm your selection.

3   Click **Yes** to delete the export.

Backing Up Data Files

The Backup function copies all BACKTRACK databases (for all existing applications), as well as all reports and labels that have been created.

1   On the Main Menu, click **Database Maintenance**.

    The **Database Maintenance** window appears.

2   Click **Transfer Functions**, and then click **Backup**.
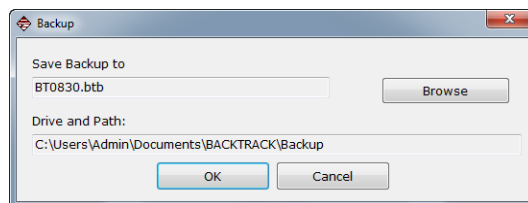
    The **Backup** window appears.

Figure 5-10 Backup

3   Click **Change file name**, specify the path and file name to which you want to save the backup, and then click **Save**.

4   Check to ensure that the file name and path settings are correct, and then click **OK**.

5   Write down the name and location of the backup along with the date in case you need to restore records from this file in the future.

Restoring Data from a Backup File

The Restore function reconstructs databases in all BACKTRACK applications. It also restores all reports and labels that have been created. This process overwrites all existing data with the backup data.

> When you restore a backup, BACKTRACK reconstructs the databases in all applications and overwrites any changes made since the date of your backup. Any reports, labels and database entries made after the date of the backup will be lost.

1   On the Main Menu, click **Database Maintenance**.

   The **Database Maintenance** window appears.

2   Click **Transfer Functions**, and then click **Restore**.
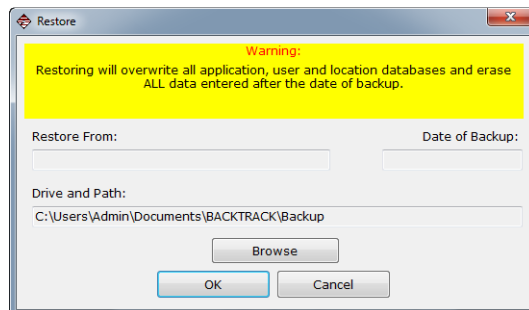
   The **Restore** window appears.

Figure 5-11 Restore

3   Click **Browse** to set the path and file name from which to restore the backup. The **Restore From**, **Date of Backup**, and **Drive and Path** settings will be filled in automatically.

4   Verify the backup date to make sure this is the backup you wish to restore from and then click **OK**.

5   Follow the prompts until the backup file has been restored.

Archiving Items

After using the system for an extended period of time, the Item database files may become too large and use more disk space than necessary. The Archive Items functions allow you to delete such item records or save them to a separate file for later reference.

Accessing the Archive window

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Transfer Functions**, and then click **Archive Items**.
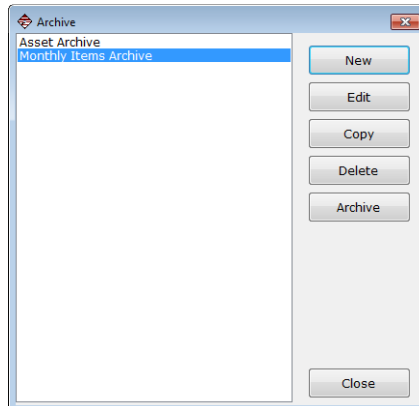
The **Archive** window appears.

Figure 5-12 Archive

Creating a New Archive

1   Access the **Archive** window according to the instructions on page 5-14.

2   Click **New**.

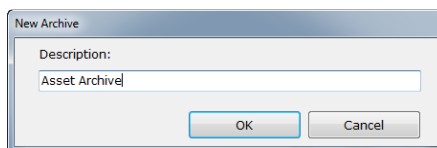The **New Archive** window appears.

Figure 5-13 New Archive

3   In the **Description** field, type an identifying name for this
    archive, and then click **OK**.
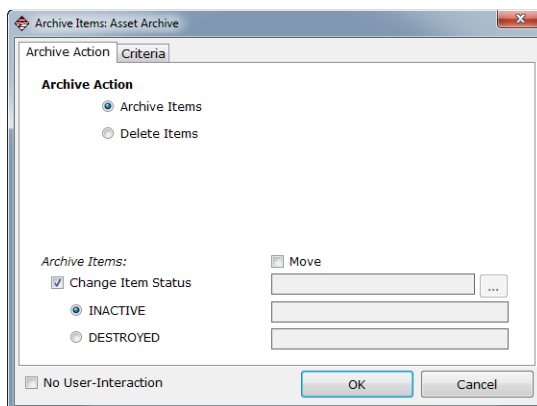
    The **Archive Items: <Archive>** window appears.

Figure 5-14 Archive Items - Archive Action Tab

4   On the **Archive Action** tab, do one of the following:

    • To archive items, select **Archive Items** as the **Archive
      Action** and select the desired archive settings.

      Change Item Status: Changes the status of archived
      items to either **Inactive** or **Destroyed**.

      Move: Moves all archived data to the specified location.
      This will allow you to access the data at a later time for
      reporting purposes.

Note: You can select both **Change Item Status** and **Move** options for one archive.

- To delete items, select **Delete Items** as the Archive Action and select the desired deletion settings.

  Save to File (Items): Saves the deleted item data to the specified file.

  Save to File (Transactions): Saves the deleted transaction data to the specified file.

  Create new file name if file already exists: Automatically generates a sequentially numbered file name for each archive.
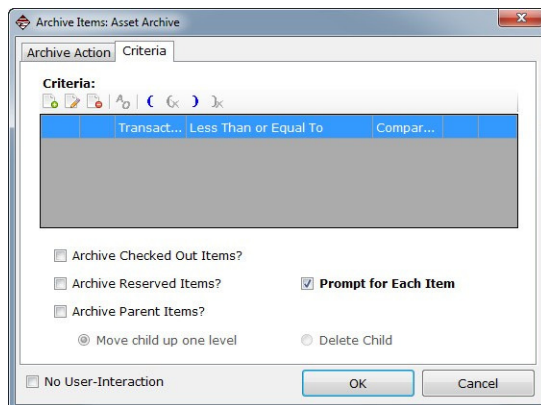
5   Click the **Criteria** tab.

Figure 5-15 Archive Items - Criteria Tab

6   To set up record selection criteria, click **Add** and set up criteria to limit the scope of the archive to specific items. For information on setting criteria, see the BACKTRACK online Help.

7   Still on the **Criteria** tab, set up additional Criteria options as desired.

- **Archive Checked Out Items:** Includes items that are currently checked out.
- **Archive Reserved Items:** Includes items for which reservations currently exist.
- **Archive Parent Items:** Includes parent items. Because the parent item acts as the location, you must specify whether you want its child items to be moved up one level to the location where the parent item was assigned, or if you want the child items to be archived/deleted.
- **Prompt for Each Item:** Displays a prompt for each item that BACKTRACK finds to archive, based on the criteria, so that you can choose whether or not to archive the item.

8 To perform the archive operation with a minimal amount of user interface screens appearing, click the **No User-Interaction** check box located at the bottom of the window.

9 Click **OK** to return to the **Archive** window.

Archiving Data

1 Access the **Archive** window according to the instructions on page 5-14.

2 Select the desired archive to use to archive data and click **Archive**.

A prompt appears asking you to confirm your selection.

3 Click **Yes** to perform the archive operation.

BACKTRACK processes the archive and displays a message when the process is complete. You will then have the opportunity to print or preview a report of the archived data.

Editing an Existing Archive

1 Access the **Archive** window according to the instructions on page 5-14.

2 Select the archive you want to edit and click **Edit**.

The **Archive Items: <Archive>** window appears.

3   Refer to the archive options covered in the "Creating a New Archive" section on page 5-14 to change the setup for this archive.

Copying an Archive

1   Access the **Archive** window according to the instructions on page 5-14.

2   Select the archive you want to copy and click **Copy**.

The **Copy: <Archive>** window appears.

3   In the **To New Name** field, type the name to use for the archive copy.

4   Click **OK**.

The new archive will now be available in the list of existing archives if you would like to edit it.

Note: You can save the archive copy for use with a different application by selecting the application from the **Application** drop-down list. If you do so, it is best to select another application whose database uses the same fields as those present in the original archive.

Deleting an Archive

1   Access the **Archive** window according to the instructions on page 5-14.

2   Select the archive you want to delete and click **Delete**.

A prompt appears asking you to confirm your selection.

3   Click **Yes** to delete the archive.

Archiving Transactions

The Archive Transactions function allows you to remove old records from the Transaction database based on a cut-off date that you specify. BACKTRACK will then remove transaction records created prior to the specified date and save them to a separate file for future reference.

1   On the Main Menu, click **Database Maintenance**.

   The **Database Maintenance** window appears.

2   Click **Transfer Functions**, and then click **Archive Transactions**.

   The **Archive Transactions** window appears.
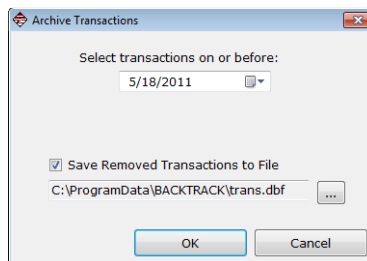
Figure 5-16 Archive Transactions

3   Enter a cut-off date; BACKTRACK will select all transactions taking place before this date.

4   If you wish to keep a record of the removed transactions, click on the **Save Removed Transactions to File** check box and enter the name of the file to which you would like to save the removed transactions. If you do not select this option and enter a file name, the removed transactions will be deleted.

Transferring Applications

The Transfer Applications function allows you to selectively transfer BACKTRACK applications with or without the data in the database files.

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **Transfer Functions**, and then click **Transfer Applications**.
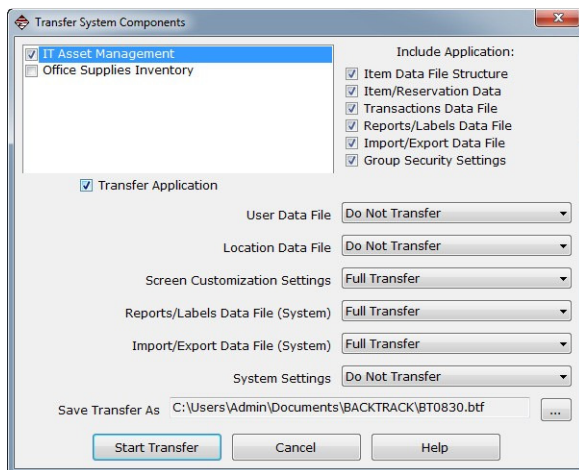
The **Transfer System Components** window appears.

Figure 5-17 Transfer System Components

3   Select the application to transfer and then click the **Transfer Application** check box to tag the application for transfer. (An "v" to the left of the application name indicates that the highlighted application will be transferred.)

4   Select (or deselect) application components from those listed under **Include Application**. The selected components will transfer with the application.

5 Select from the drop-down list choices (Transfer Structure, Full Transfer, etc.) to specify which system files and settings should be transferred with the application.

> If you transfer the structure and the data, or if you
>
> do a full transfer on the system data files (User and Location databases), you will overwrite the existing structure and data.

6 Click the **Browse** ⌐…⌐ button to set the directory path and to save the transferred application to a specific file name.

7 Click the **Start Transfer** button to perform the transfer.

Working with Sessions

The Sessions function works like a quick and simple backup and restore process. A BACKTRACK "session" saves every part of your BACKTRACK system, including all applications, system settings, user-defined fields and database records. The Sessions function provides an easy way to switch between BACKTRACK tracking systems if you are creating and maintaining multiple applications.

1 On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

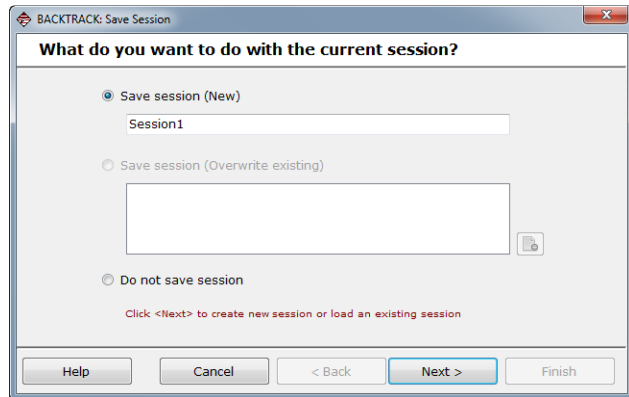2 Click **Sessions**.

The **Save Sessions** window appears.

Figure 5-18 Save Sessions

3 Choose one of the following options:

- • Save the current session under a new name.

- • Overwrite the existing session (basically re-saving and updating a previously saved session).

- • Do not save the session (allowing you to open a fresh or blank BACKTRACK system without saving the existing session).

4 Click **Next** to bring up the **Load or Create Session** window. This window allows you to load an existing (pre-saved) session or replace the current session with a clean (new) session.

5   Click **Finish** to return to the **Database Maintenance** window.

CHAPTER 6

PDT/Mobile Device Functions

The PDT/Mobile device functions in BACKTRACK are designed to be used with supported Windows mobile devices. You can use a Mobile device to perform transactions, add items, and carry out physical inventory functions.

You can use a PDT/mobile device to scan barcodes, reading the barcode data into the device. That data can then be transferred to BACKTRACK in just a few easy steps.

Accessing the PDT/Mobile Device Functions in BACKTRACK

1   On the Main Menu, click **Database Maintenance**.

The **Database Maintenance** window appears.

2   Click **PDT Functions**, and then on the **Select Mobile Device**/**PDT Type** window, select the type of device you are using.

The **PDT Functions** window appears.
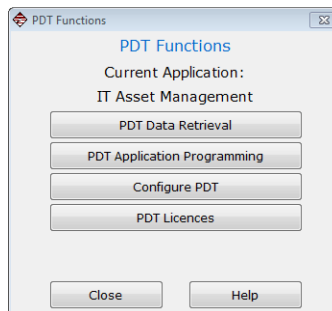
Figure 6-1 PDT Functions

About Setting Up a Mobile Device

This is the recommended sequence for setting up a mobile device:

1   Configure the mobile device

2   Program the mobile device with the application

3   Retrieve mobile device data

Configuring the PDT/Mobile Device

The Configure PDT functions allow you to set up and enable the PDT/mobile device options.

Note: Once you have configured the PDT/mobile device, you must then program the device in order for the configuration changes to take affect. For instructions on programming the device, see the "PDT/Mobile Device Application Programming" section on page 6-5.

1   Access the **PDT Functions** window according to the instructions on page 6-1.

2   Click **Configure PDT**.

The **Configure PDT** window appears.
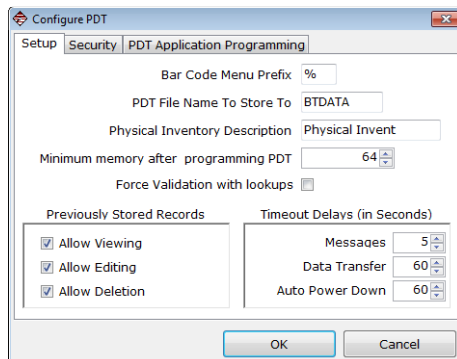
Figure 6-2 Configure PDT – Setup Tab

3   On the **Setup** tab, configure the following PDT/mobile device setup options:

- **barcode Menu Prefix:** Allows you to specify a character to be used at the beginning of a barcode printed with the BACKTRACK Label Designer. A prefix allows you to create stackable barcodes used to scan a series of barcoded words in succession in order to form a multi-word item description. The prefix you enter should be a single character that will NOT be used as the first character for any of your barcodes. The default prefix is the percent sign (%). For information on printing PDT barcode menus, see the BACKTRACK online Help.

- **PDT Filename To Store To:** The file name to which PDT/mobile device data will be stored. You can enter a file name or leave it at its default setting (BTDATA).

- **Physical Inventory Description:** Represents the text displayed on the PDT/mobile device for the Physical Inventory menu option.

- **Minimum memory after programming PDT:** The amount of usable memory for performing transactions. This setting allows you to adjust the minimum memory to make sure there is enough memory in the PDT/mobile device to accommodate the number of transactions performed between data retrievals.

- **Previously Stored Records:** Determines if the PDT/mobile device operator will be allowed to view, edit, and delete transactions stored on the device.

- **Timeout Delays (in Seconds):** The amount of inactive time allowed before BACKTRACK will power down the PDT/mobile device.
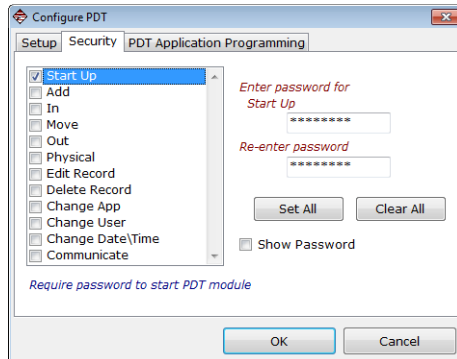
4   Click the **Security** tab.

Figure 6-3 Configure PDT - Security Tab

5   Use the **Security** tab options to set passwords for all of the operations that can be performed with a PDT/mobile device.

Each function can have a different password so users will have access to only those functions for which they have password rights (but multiple passwords cannot be assigned to a single PDT function).

 Note: This security does not carry over to the user security in the main program.

6   Click the **PDT Application Programming** tab.
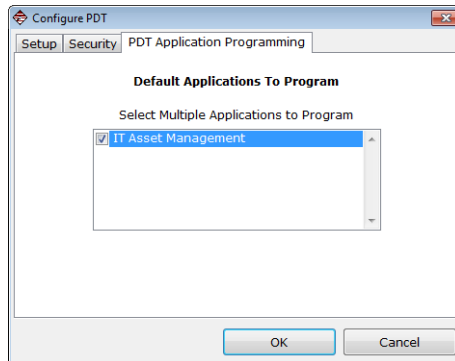
Figure 6-4 Configure PDT – PDT Application Programming Tab

7   On the **PDT Application Programming** tab, select up to five applications to transfer to the PDT/mobile device.

Note: The application selection is optional at this point in the process. You will also have the opportunity to select the applications when performing the PDT application programming step that follows.

PDT/Mobile Device Application Programming

The PDT Application Programming function is used to transfer application information to the PDT/mobile device so that users will be able to perform transactions and other application-specific functions. Up to five applications can be transferred to the PDT/mobile device.

Note: If you would like to set up user prompts for collecting additional information, you will need to add these fields BEFORE transferring your applications to the PDT/mobile device. See the "Editing the Transaction Structure" section on page 2-19 for information on how to configure these prompts.

To transfer an application to the PDT/mobile device:

1   Access the **PDT Functions** window according to the
    instructions on page 6-1.

2   Click **PDT Application Programming**.
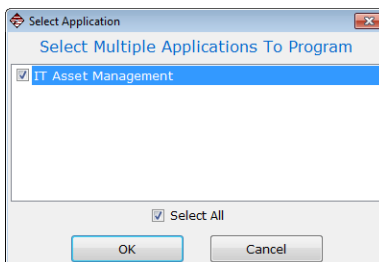
    The **Select Application** window appears.

Figure 6-5 Select Applications to Program

3   Select up to five applications to transfer to the PDT/mobile
    device, and then click **OK**.
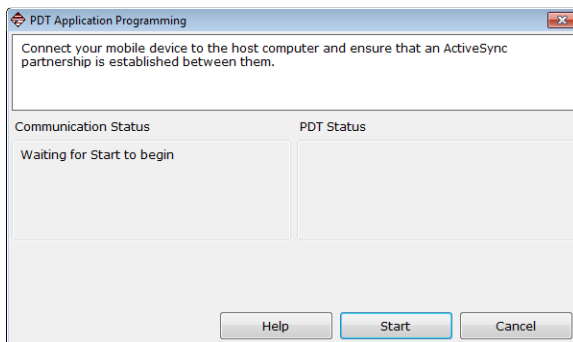
    The **PDT Application Programming** window appears.

Figure 6-6 PDT Application Programming

4   Click **Start**

Auto Detecting PDT makes the PC locate the device automatically.

When the upload is complete, the BACKTRACK start screen will display on the device.

Using the PDT Command Menu

The PDT/Mobile Device Command Menu displays the transactions you can perform and the device code used to execute them.

The following table outlines the Command Menu options used for normal operation of a **Windows mobile device**.

Mobile Device Code	Command
1	Check Out/Take Out
2	Check In/Restock
3	Move Item
4	Reserve (Online mode only)
5	Add Item
6	Physical Inventory

Note: The command prompts may appear differently than those listed here if they were previously customized to fit a particular application.

PDT/Mobile Device Data Retrieval

The PDT Data Retrieval function allows you to transfer the PDT/mobile device transaction records from the device into BACKTRACK so you can monitor all item tracking activities performed using the device.

1   Access the **PDT Functions** window according to the instructions on page 6-1.

2   Click **PDT Data Retrieval**.

The **PDT Data Retrieval** window appears.
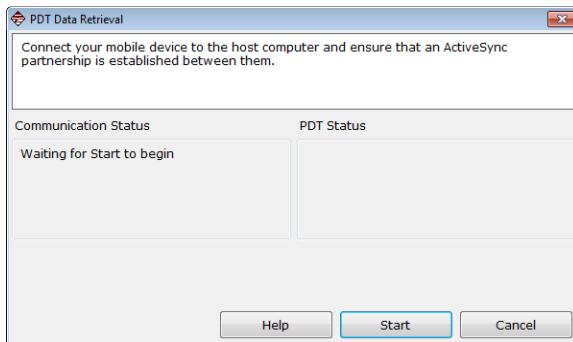
Figure 6-7 PDT Data Retrieval

3   Click **Start** to begin the transfer.

During processing, BACKTRACK locates the PDT/mobile device and then retrieves all of the transaction records. When this is complete, the **PDT Data** window appears.
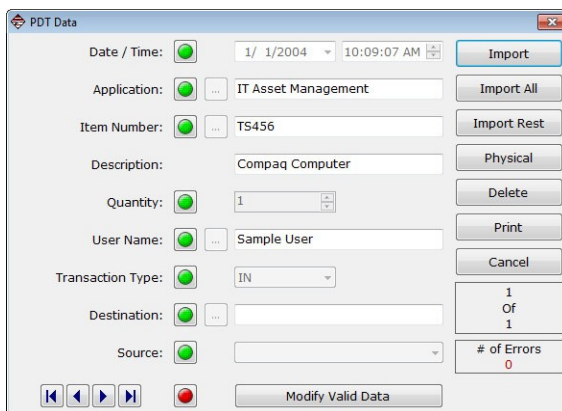

Figure 6-8 PDT Data

After BACKTRACK has received all of the device's data records, the **PDT Data** window will display the records that are being processed and any data records that have errors in them. Errors appear as red stoplights, warnings appear as yellow stoplights, and areas of the record that have no discrepancies appear with green stop lights.

Note: Other PDT users cannot retrieve information until you exit this screen. To correct the errors at a later time, click **Cancel**. To return to this operation later, select **Continue Processing PDT Data** from the **PDT Functions** window.

4   Click any stoplight to display the error or warning. You must correct errors (or delete the transaction record) in order to import the transactions into BACKTRACK.

5   To change valid data (data with no errors) click **Modify Valid Data**. (Remember, to activate this option you must select the **Modify PDT Data Retrieved** setting on the **Security Group** window shown in Figure 3-3 on page 3-4.)

6   After the data has been retrieved, select one of these actions:

   •   **Import:** Import the currently displayed record.

   •   **Import All:** Import all records that do not have errors, beginning at the top of the database and continuing until an error is encountered.

   •   **Import Rest:** Import the remaining records that are in the retrieval screen, beginning at the currently displayed record and continuing until an error is encountered.

   •   **Physical:** If you are retrieving data from a physical inventory application, click **Physical** to proceed to the **PDT Physical Inventory** window.

   •   **Cancel:** Cancel the import, but save the data on this screen so you can import it at a later time using the **Continue Processing PDT Data** function.

**Data
Retrieval for
Physical
Inventory**

The PDT Physical Inventory functions allow you to set options for retrieving data from a physical inventory.

1 On the **PDT Data** window (Figure 6-8), click the **Physical** button.window

   The **PDT Physical Inventory** window appears.

   The window displays three different Quantity columns:

   • **PDT column** – Displays the quantities or number of items you actually entered or scanned for that location.

   • **System column** – Displays the quantities that currently exist in the BACKTRACK system for that location.

   • **New column** – Allows you to enter a quantity or change it to reflect the actual quantity in that location.

2 Specify if you want to sort by Application/Item or by Location using the **Sort By** drop-down list at the top of this window.

3 Click the **Default to System Quantity** button to quickly change all quantities in the New column to match those in the System column.

4 Click the **Import all missing items for scanned locations** check box to view any items that exist in this location but were not scanned.

CHAPTER 7

Transaction Module

BACKTRACK users will spend the majority of their time in the Transaction module, tracking and observing item or inventory operations. All transactions (Check Out, Take Out, Move, etc.) are performed within one of the two types of applications available in BACKTRACK: item tracking and inventory tracking.

The Transaction toolbar buttons change depending on which type of tracking application is currently open. Opening an application automatically sets the Transaction toolbar buttons to the appropriate text and functions for that application.

The toolbar buttons that appear for item tracking applications include **Check Out**, **Check In**, **Reserve**, **Move**, and **Main Menu** (Figure 7-1).

Check Out | Check In | Reserve | Move | Main Menu
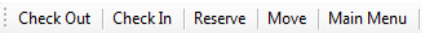
Figure 7-1 Item Tracking Transaction Toolbar

The toolbar buttons that appear for inventory tracking applications include **Take Out**, **Restock**, **Move**, and **Main Menu** (Figure 7-2).

Take Out | Restock | Move | Main Menu

Figure 7-2 Inventory Tracking Transaction Toolbar

Note: The text appearing on the Transaction toolbar buttons may have been customized by your system administrator or reseller, and therefore, may differ from what is shown above.

Item Tracking

Item tracking applications track items that are uniquely identified. These are usually non-consumable items like books, office files, client records, or tools. Each item you check in and out in an item tracking application is stored in the application's Item database with a unique item number to identify it.

Note: There is one Item database for each application.

Checking Out or Checking In an Item

Checking out or checking in items in BACKTRACK works just like checking out or checking in books at a library. When you take an item or return an item, your user number and name is recorded along with the item's ID number and the transaction time and date. In fact, any time an item is checked in, checked out, or reserved, this movement is recorded in the Transaction database for this application.

1 With an item tracking application open, click the **Check Out** or **Check In** button found on the Transaction toolbar.

Depending on the button selected, either the **Check Out** or **Check In** window appears.
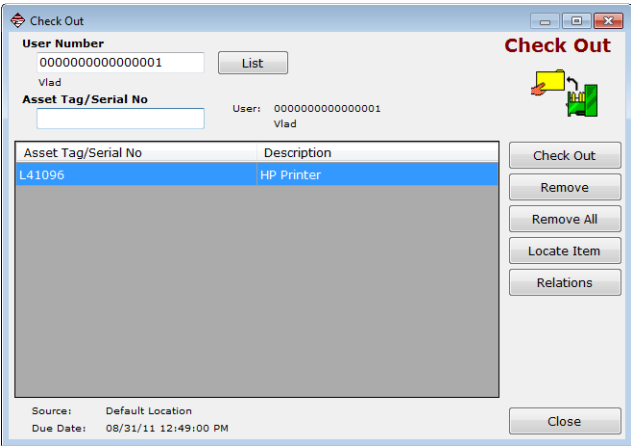
Figure 7-3 Check Out/Check In Items

2   Type in your user number or scan a user number barcode.
    If the user list option has been enabled for your system,
    click the **List** button to select your user name from a list of
    authorized users.

3   Type in the item number or scan the barcode for each item
    you wish to check in or out and press **Enter**. If you do not
    have the item number or a barcode to scan for the item,
    click the **Locate Item** button to manually select the item(s)
    from a (you can hold down the **Shift** key while clicking on
    several items to select more than one item).

4   When you are finished selecting items, click the **Check Out**
    (or **Check In**) button.

5   At this point you are presented with a receipt screen. You
    may print the receipt by clicking the **Print Receipt** button or
    finish by clicking **Close**.

Reserving Items

Reserving an item in BACKTRACK records the item, user, date,
and time of the reservation, scheduling it for future use.

1   With an item tracking application open, click the **Reserve**
    button found on the Transaction toolbar.

    The **Reservations** window appears.

2   Type in your user number or scan a user number barcode.
    If the user list option has been enabled for your system,
    click the **List** button to select your user name from a list of
    authorized users.

3   Type in the item number or scan the barcode for each item
    you wish to reserve and press **Enter**. If you do not have the
    item number or a barcode to scan for the item, click the
    Locate Item button to manually select the item(s) from a
    list (you can hold down the **Shift** key while clicking on
    several items to select more than one item).

The **Reservation Options** window appears.

Figure 7-4 Reservation Options

4   Specify when you would like to check out this item. After setting the time and date, click **OK**. (Clicking **Cancel** clears the item from the reservation list.)

5   Repeat steps 3 and 4 for each item you want to reserve.

6   When you have selected all of the items you want to reserve, click the **Reserve** button.

7   At this point you are presented with a receipt screen. You may print the receipt by clicking the **Print Receipt** button or finish by clicking **Close**.

Inventory Tracking

Inventory tracking applications track items that exist in multiple quantities (versus an item tracking application that tracks unique items, each with its own ID number). Often, items in an inventory tracking application are consumable items that are taken, used up, and cannot be replaced or reserved. Some examples would include office supplies, raw materials for manufacturing, or finished goods.

In inventory tracking, you can use the Take Out function to remove (use up) an item from inventory. This item will most likely need to be restocked at some point, but the quantity restocked does not necessarily need to equal the quantity taken. As the quantity of a particular item is depleted, this is in turn recorded in the on-hand inventory. When inventory is reduced or restocked, an entry is made into the Transaction database recording the user, quantity, time, and date of the transaction.

Taking Out or Restocking Inventory

1   With an inventory tracking application open, click the **Take Out** or **Restock** button found on the Transaction toolbar.

Depending on the button selected, either the **Take Out** or **Restock** window appears.
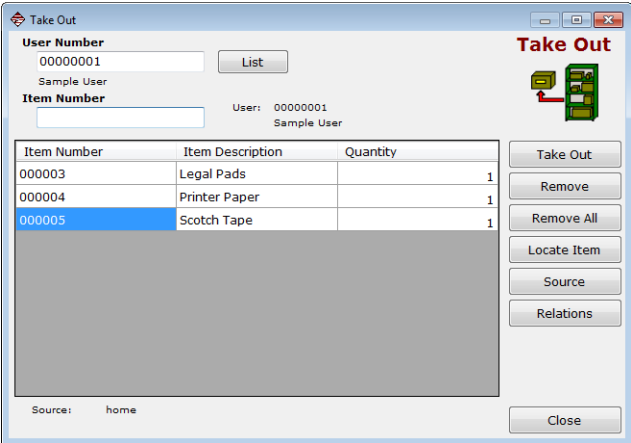
Figure 7-5 Take Out/Restock Inventory

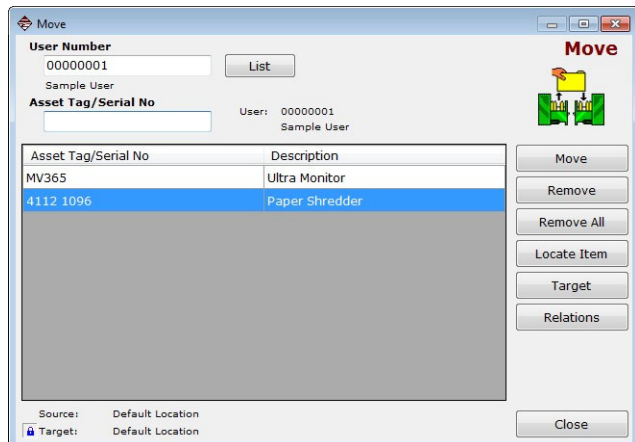2   Type in the user number or scan a user number barcode If the user list option has been enabled for your system, click the **List** button to select the user name from a list of authorized users.

3   Type in the item number or scan the barcode for each item
    you wish to restock or take out of inventory and press
    Enter. If you do not have the item number or a barcode to
    scan for the item, click the **Locate Item** button to manually
    select the item(s) from a list of available inventory (you can
    hold down the **Shift** key while clicking on several items to
    select more than one item).

4   Repeat step 3 for each item you would like to take out of or
    return to inventory.

5   When you have selected the desired quantities of all
    inventory items to be taken or restocked, click the **Take Out**
    (or **Restock**) button.

6   You are now presented with a receipt screen. You may print
    the receipt by clicking the **Print Receipt** button or finish by
    clicking **Close**.

Viewing Relations

Viewing relations is useful for determining if all of the items
assigned to a location or "parent item" are available. A parent
item is usually not a physical place, but an item that contains
other items (the child items). For example, in a tool tracking
application you may have tools (child items) that are stored in a
toolbox (the parent item).

If items are contained within a parent item, then any activity
involving the parent item (Check Out, Take Out, Move, etc.) will
also affect the child items—if you check out the parent item
toolbox, you will also be checking out the tools (child items) it
contains.

The **View Relations** window allows you to view these item
relationships and check the quantity of each inventory item on
hand if you are working in an inventory tracking application.

To view relations:

1   With the desired item or inventory tracking application
    open, on the **Mode** menu, click **View Relations**.

    The **View Relationships** window appears.

2   Select the item you wish to see and click **View**. The item is
    displayed in a list with all of its relations.
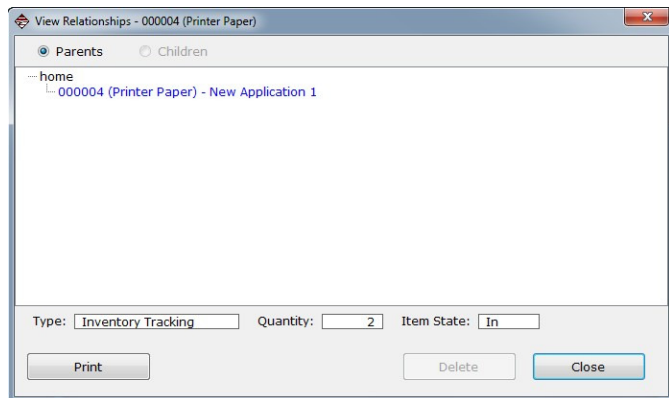
Figure 7-6 View Relations

3   Parent items are those items listed along the left margin.
    The child items are indented and listed below the parent
    item(s). You may print out this item relationship information
    by clicking the **Print** button.

Moving Items or Inventory

BACKTRACK uses a single Location database (shared by all
applications) that keeps information on all of the places where
items are stored. Depending on your particular application, you
may want to assign items either to a location or to a parent item.
A location is simply a physical place where items can be stored.
A parent item is usually not a physical place, but an item (the
parent item) that contains other items (the child items).

In both item tracking and inventory tracking applications, an item is assigned to either a location or to a parent item at the time it is added. You can also move items to either a location or to a parent item. When an item is moved to a parent item, the item's assigned location becomes the parent item and an entry is made into the Relationship database to record this. All item movement is recorded with the user number, the name of the user who performed the move, and the date and time the item was moved.

To move items:

1   Open the desired item or inventory tracking application and then click the **Move** button found on the Transaction toolbar.

    The **Move** window appears.

Figure 7-7 Move Items or Inventory

2   Type in your user number or scan a user number barcode. If the user list option has been enabled for your system, click the **List** button to select your user name from a list of authorized users.

3   Type in the item number or scan the barcode for each item you wish to move and press **Enter**. If you do not have the item number or a barcode to scan for the item, click the **Locate Item** button to manually select the item(s) from a list of available inventory items (you can hold down the **Shift** key while clicking on several items to select more than one item).

A window appears allowing you to specify whether you want to move the selected item to a location or to a parent item.
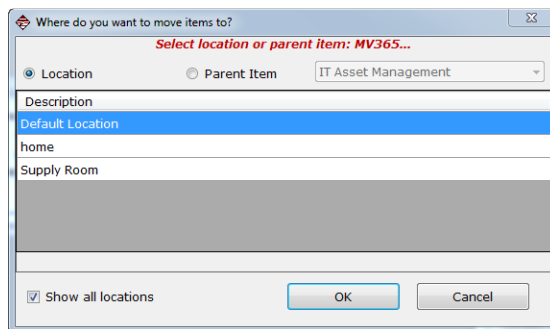
Figure 7-8 Select Location or Parent Item

4   By default, a location lock feature is enabled so that all items selected will be moved to the same location (you will be prompted to select a location or parent item for the first item only; all items selected thereafter will be moved to the same location). If you would like to move the selected items to different locations (and specify where to move each item), simply turn off the location lock feature by clicking the Lock 🔒 button that appears in the lower left corner of the **Move** window.

5   Select **Parent Item** or **Location** and then choose the specific item or location from the list. Parents from other applications may also be used by selecting the Parent Item and then selecting a different application name from the drop-down list.

Note: An Inventory item cannot be a parent item.

Click **OK**.

6   When you have set up all of the items you wish to move, click **Move**.

7   At this point you are presented with a receipt screen. You may print the receipt by clicking the **Print Receipt** button or finish by clicking **Close**.

C H A P T E R **8**

Report Designer Module

BACKTRACK's Report Designer module provides virtually unlimited reporting capabilities – you can create, edit and print professional reports using selected criteria. The Report Wizard simplifies the process by helping you through each step of report generation, and the Advanced Report Designer is available if you would like to add advanced report settings.

Accessing the Report Designer Module

1   On the Main Menu, click **Design**/**Print Reports**. Alternatively, you can click **Reports** in the **File** menu.

The **Select Report** window appears.
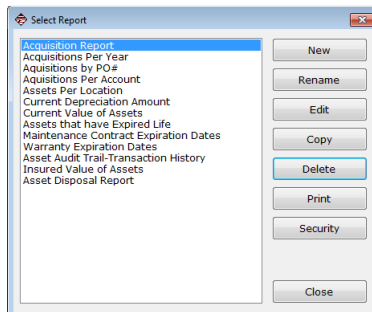
Figure 8-1 Select Report

Creating a New Report (Using the Report Wizard)

1   Access the **Select Report** window according to the instructions on page 8-1.

2   Click the **New** button to create a new report and then click
    the **Report Wizard** button.

    Step 1 of the Report Wizard appears.
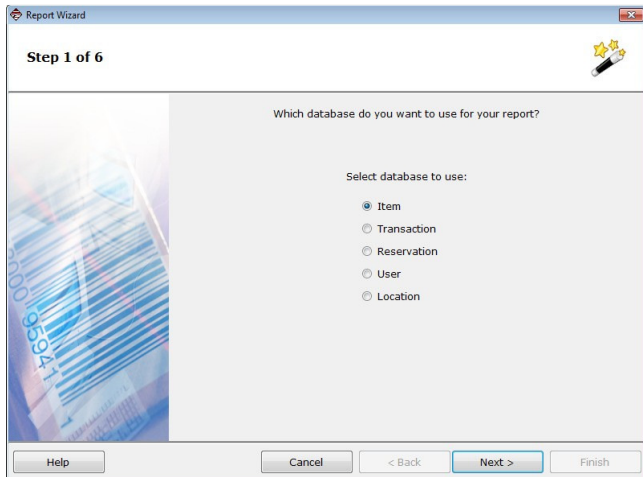
Figure 8-2 Report Wizard Step 1

3   Specify the database from which to generate a report by
    selecting the Item, Transaction, Reservation, User, or
    Location database name. Click **Next** to continue.

Step 2 of the Report Wizard appears.
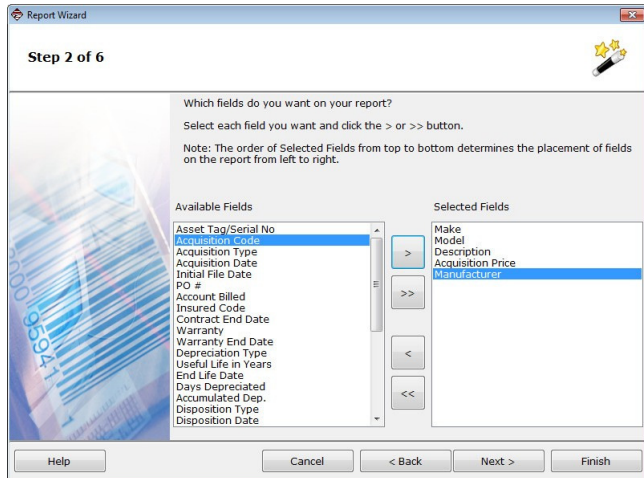
Figure 8-3 Report Wizard Step 2

4   Click on a field name in the **Available Fields** list (the fields
    you select will be used for the body of your report), then
    use the arrow buttons to move the field name over to the
    Selected Fields list. Repeat this step for each field you
    want to include in the body of the report. Click **Next** to
    continue.

Step 3 of the Report Wizard appears.

Figure 8-4 Report Wizard Step 3

5   This step allows you to sort and group fields for your report. Choose the fields for sorting by clicking the drop-down arrows and selecting the field on which to sort. The sort option orders the items by the selected field. The **Group** option assembles and counts the items in that group.

6   Select **Ascending** or **Descending** for numeric or alphabetic listing in the report.

7   Select the **Detail** or **Summary** option for your report display and click **Next**.

Step 4 of the Report Wizard appears.
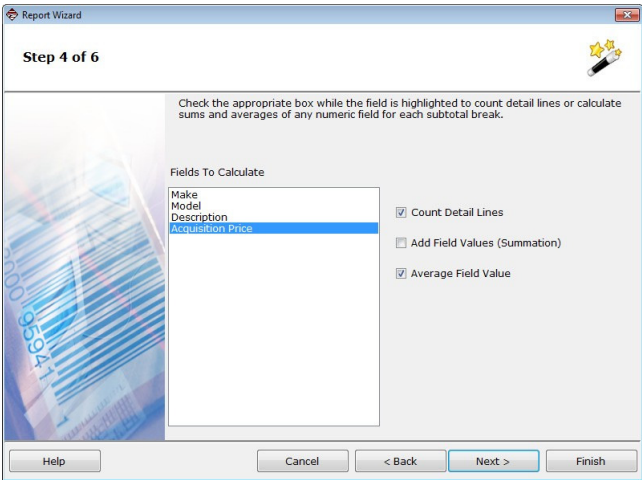
Figure 8-5 Report Wizard Step 4

8   To calculate sums or averages on a field, highlight a field name and then check any or all of the calculation options listed to the right. (You must select a numeric field in order for the **Add Field Values** and **Average Field Values** options to be enabled.) Click **Next** to continue.

Step 5 of the Report Wizard appears.
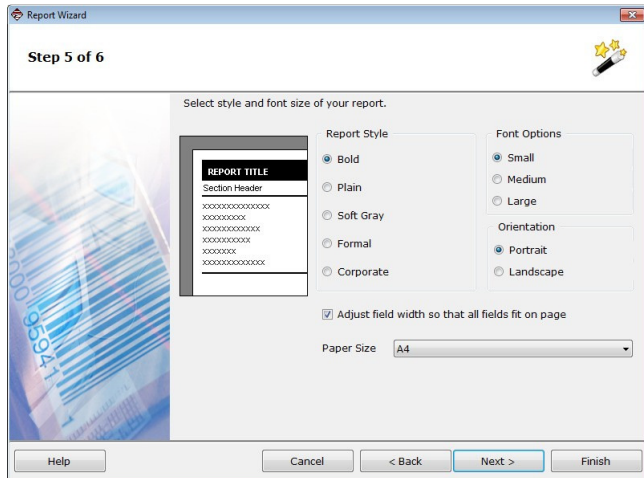
Figure 8-6 Report Wizard Step 5

9   Select a format for your report. The available formats
     include **Bold**, **Plain**, **Soft Gray**, **Formal** and **Corporate**,
     with **Bold** as the default. You can view examples of all
     report formats by clicking on each Report Style option.

10 Select a font size for your report. When choosing a font
     size, remember to take into account the number of fields
     you've included and the amount of data in those fields, as a
     large font may not allow you to print as much information on
     one page as would the small font size.

11 Specify either a **Portrait** or **Landscape** page orientation
     and a **Paper Size** for printing. Click **Next** to continue.

Step 6 of the Report Wizard appears.
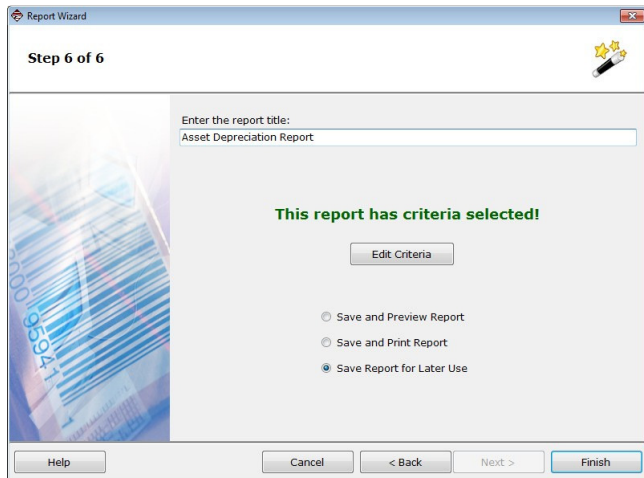
Figure 8-7 Report Wizard Step 6

12 Enter a title for the report and specify any record selection criteria you would like to use.

13 Select one of the save/print options. If you want to preview the report before printing, click the **Save and preview report** option. If you want to print the report without previewing it, click the **Save and print report** option. If you do not want to preview or print the report at this time, click the **Save report for later use** option.

14 Click **Finish**.

Editing Reports (Using the Advanced Designer)

The Advanced Designer options offer more control, flexibility and features than the Report Wizard options. For example, in the Advanced Designer you can set the height of each detail line (row), control the placement of text/fields on the page, and add graphics and logos.

Note: Although you can create a new report using the Advanced Designer, if you are not familiar with BACKTRACK reports you should set up the report framework using the Report Wizard. If you want to add advanced report settings at a later time, you can edit the report using the Advanced Designer.

1   Access the **Select Report** window according to the instructions on page 8-1.

2   Select the report you want to edit and click **Edit**.

3   Click **Advanced Designer**,

The report opens in the **Advanced Report Designer**.
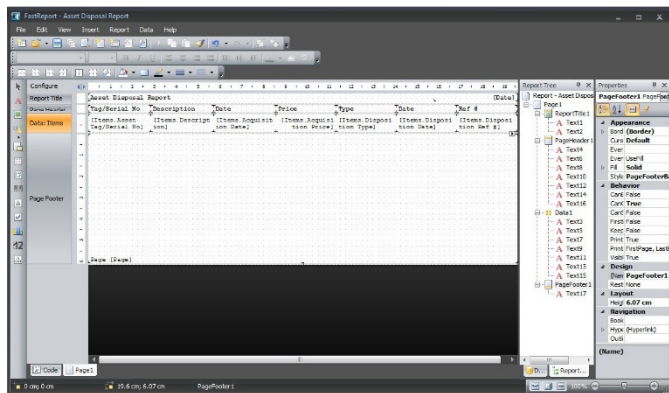
Figure 8-8 Advanced Report Designer

4   To move text, fields, lines, shapes, or graphics, click on the object and drag it to the desired location.

5   To view all objects on the report, check the **Report Tree**. To edit one of the objects listed select the object or highlight the object in the **Report Tree**, then use the properties tab to edit the object as desired.

6   To add objects, use the following Advanced Designer
    toolbar buttons.

Text: The object can display any text data,
specifically:
· one or several text lines,
· data columns,
· report parameters,
· total values,
· expressions,
· any combination of the above items.

Picture: The object can display graphics in the

following formats: BMP, PNG, JPG, GIF, TIFF, ICO,
EMF, WMF.

Shapes: Displays one of the geometrical shapes:
rectangle, ellipse, triangle, and others.

Table: Displays a table containing rows, columns
and cells.

MS Chart: Displays a chart.

Preview: View a report with displaying the actual
data.

Save Report: Save the report.

Exit: Close the report. If you have made changes

you will be asked if you would like to save the report
before closing it.

Custom Report Field

Set up a custom report field that gets its value from the result of
a numeric or character expression.

To write an expression quickly, use the Expression Editor.

Report Groups

Group (or segment) your report data. For example, if you want
all items in one location to be grouped together, you would
group based on location.

Adding a group into a report can be done by using two methods:

- You can add the **Group header** band in the **Configure Bands** window. To do this, click the **Add** button and select the **Group header** band.

  FastReport adds the group to the available **Data** band or will create a whole group, if such a band is not in the report.

- You use the wizard, which can be called from the **Report**/**Group Expert** menu. In order to create a group, enter the group condition and click the **Add** button.

  The wizard will add all the elements of the group into the report. Also, it creates the **Text** object on the group header, in which the group condition is printed.

Sorting the Data

Organize report data in a particular order. For example, you could sort data by initial file date, part number or ID number. There is a possibility of sorting the data source in two ways:

- You can set up the data sorting in the Group editor. Data source will be automatically sorted on group condition; or

- You can set up the sorting in the **Data** band editor.

Both methods are equivalent, however it is easier to use the first method. When creating groups, you set up the data grouping and sorting in one dialog.

Note: By default, data is sorted in ascending order.

Filtering the Data

Retrieve specific records from the BACKTRACK databases. For example, you can set report criteria to list only records that are checked out or list items that have experienced activity during a particular month.

In order to filter a row, which is printed in the **Data** band, call **Edit DataBand** window and switch to the **Filter** tab.
As a filter expression, you can indicate any correct expression.

Setting Security on a Report

1   Access the **Select Report** window according to the instructions on page 8-1.

2   Select the report for which you would like to set up security and click **Security**.
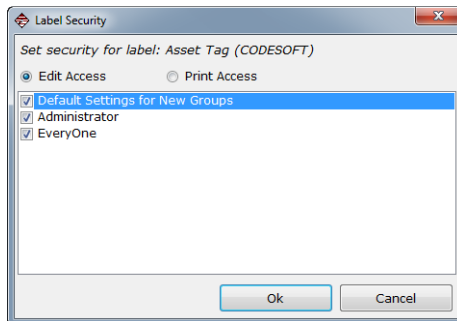
The **Report Security** window appears.

Figure 8-9 Report Security

3   Set up report editing and printing access for each user group using the following options:

•   **Edit Access:** The ability to modify or delete the report.

•   **Print Access:** The ability to print the report.

•   **Default Settings for New Groups:** Applies to any new security groups that are created.

Note: Security groups must be activated for this setting to take effect. Selecting the **Require User ID/Password for Maintenance** check box on the **Change System Settings** window activates security groups. Make sure users know their ID and system password.

Setting Up Record Selection Criteria

You can limit the number of records included in your reports by defining selection criteria based on field values and logic statements and by comparing one field to another or to a value that you enter. You can also choose to enter selection criteria at print time to obtain specific results each time you print the report.

1   In the Report Wizard, in step 6 of the wizard, click the **Add Criteria** button.

    The **Report Criteria** window appears.
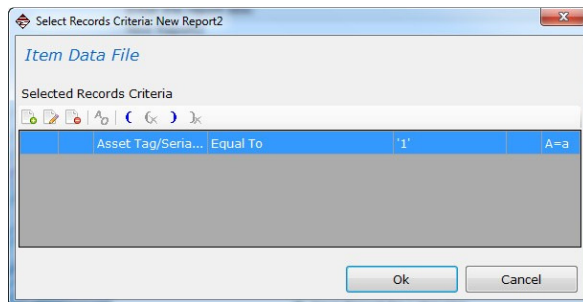
Figure 8-10 Report Criteria

2   To set up record selection criteria, click **Add** and define selection criteria for the records you want to include in your report. For example, you could search for records for all items that are currently checked out by a particular user. For information on setting criteria, see the BACKTRACK online Help.

Copying a Report

1   Access the **Select Report** window according to the instructions on page 8-1.

2   Select the report you would like to copy and click **Copy**.

    The **Copy: <Report>** window appears.

3   In the **To New Name** field, type the name to use for the
    report copy.

4   Click **OK**.

    The new report will now be available in the list of existing
    reports if you would like to edit it.

    Note: If a report you want to copy is based on an
    application-specific database (Item, Transaction, or
    Reservation) you can save it for use with a different
    application by selecting the application from the
    Application drop-down list. If you do so, it is best to select
    another application whose database uses the same fields
    as those present in the original report.

Deleting a Report

1   Access the **Select Report** window according to the
    instructions on page 8-1.

2   Select the report you would like to delete and click **Delete**.

    A prompt appears asking you to confirm your selection.

3   Click **Yes** to delete the report.

Printing a Report

1   Access the **Select Report** window according to the
    instructions on page 8-1.

2   Select the report you would like to print and click **Print**.

The **Reports** window appears.
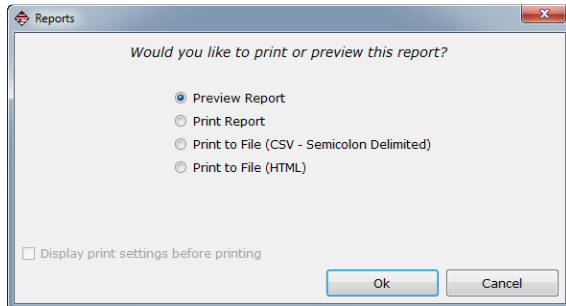
Figure 8-11 Preview or Print Report

3   Choose one of the following preview or printing options:

- **Preview Report:** Displays a sample of how this report will look when printed.

- **Print Report:** If you select this option, you can also select the **Display print settings before printing** check box, so that you can select a printer, number of copies, etc. If you clear the check box, the report will print according to the current settings.

- **Print to File (CSV - Semicolon Delimited):** Creates a CSV file from the report data. This type of file can be imported into other programs.

- **Print to File (HTML):** Creates an HTML file from the report data. This type of file format can be viewed using an Internet browser.

4   Click **OK**.

C H A P T E R 9

Label Designer Module

BACKTRACK's Label Designer module works with TEKLYNX' barcode labeling software products – CODESOFT, LABEL MATRIX, and LABELVIEW – for label creation and editing.

The TEKLYNX label design program you choose to use is installed and configured separately from the main BACKTRACK program. Once installed, the Label Designer can be accessed from within BACKTRACK, allowing you to easily integrate barcode labeling into your day-to-day tracking activities. Although you can track items without using barcode labels, barcodes can help you eliminate the time and errors involved with manually entering identification numbers and can provide an accurate and efficient way to track items or inventory.

Accessing the Label Designer Module

On the Main Menu screen, click the **Design/Print Labels** button.

The **Select Label** window appears.
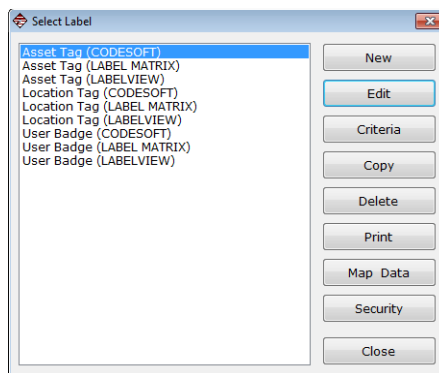
Figure 9-1 Select Label

Label management functions – such as copying, deleting, printing, and setting criteria and security for existing labels – can be performed from the **Select Label** window without running the Label Designer program. The Label Designer is launched only for creating a label or editing a label.

Creating a New Label

1   Access the **Select Label** window according to the instructions on page 9-1.

2   Click **New**.

If you have more than one compatible label design program installed, the **Label Designer** window appears so you can select the label design program you would like to set as the default program to use for editing and printing this label.
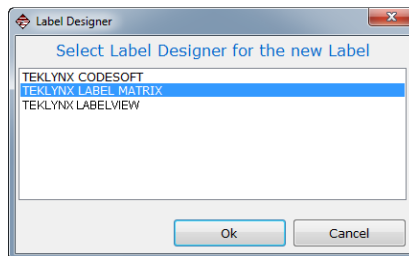
Figure 9-2 Set Default Label Designer

3   Select the desired application, and then click **OK**.

The **New Label** window appears.
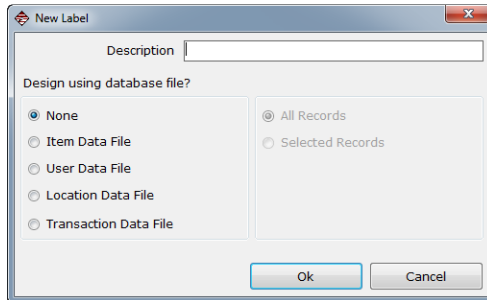
Figure 9-3 New Label

4   In the **Description** field, type the identifying name to use for this label. This is the label name that will appear in the labels listing on the **Select Label** window.

5   If you want to use records from a BACKTRACK database to include as fields on the label, select the desired data file.

6   If you selected a BACKTRACK database, specify if you want to use data from **All Records** or only **Selected Records** when printing your labels.

7   Click **OK**.

The new label is created and opened in the default Label Designer program.

8   Proceed to set up and design your label. For information on setting up and designing labels, see the documentation included with the Label Designer program.

9   If you are using data from a BACKTRACK database, you will need to set up the fields in the Label Designer so they can be mapped to corresponding fields in the database. See the "Setting Up Label Fields" section on page 9-4 for information on the steps required to set up these fields in each of the Label Designer programs.

10 In the Label Designer, on the **File** menu, click **Exit**. You will be asked if you wish to save the label. Click **Yes**.

11 If your label contains any fields set up to be mapped to a BACKTRACK database, the **Map Data** window will appear. See the "Mapping Label Fields to BACKTRACK Fields" section on page 9-6 for information on mapping label fields to BACKTRACK fields.

Setting Up Label Fields for Mapping

In order to include records from a BACKTRACK database in fields on your label, you must first create the label fields to be mapped.

When setting up the label fields for mapping, the steps differ depending on which program you are using to design the label – CODESOFT, LABEL MATRIX, or LABELVIEW.

Setting Up Fields in CODESOFT

In CODESOFT, to add fields that can be mapped to fields in a BACKTRACK database, you must create these fields using a **Free** data source.

1   In CODESOFT's Document Browser, **Data sources** tab, right-click the **Free** data source, and click **Add**.

A new free variable is created with a system-assigned name (such as Var1).

2   On the **Input** tab, in the **Name** field type a name for the free variable. The name should allow you to easily identify this field later so you can map it to the corresponding field in the BACKTRACK database.

3   Click **OK**.

4   To assign the variable to a text, barcode, or image object, do one of the following:

• In the Document Browser's **Data sources** tab, drag and drop the free variable onto the label. A box appears from which you must select **Text**, **Barcode** or **Image**. Select the desired object type to add it to the label.

OR

- Right-click on an existing text, barcode or image object, and click **Properties**. On the Properties window **Data source** tab, click the **Variable data** option and then select the Free variable you created previously. Click **OK**.

This CODESOFT field is now set up and available for mapping.

Setting Up Fields in LABEL MATRIX

In LABEL MATRIX, to add fields that can be mapped to fields in a BACKTRACK database, you must create these fields using a **Keyboard Input** data source.

1   In LABEL MATRIX, on the left-side Add Image toolbar, click the button that corresponds with the type of object (text, barcode, etc.) you would like to add to the label.

2   On the Properties window **Data** tab, click in the **Origin** field, and then click **Keyboard Input**.

The window updates to display the boxes for defining a Keyboard Input field, including a system-assigned name for the field (such as Keyboard 1).

3   In the **Variable** field, replace the system-assigned name with a new name for the keyboard input field. The name should allow you to easily identify this field later so you can map it to the corresponding field in the BACKTRACK database.

4   In the **Sample** field, type a sample value or sample text to appear on the label for this field. This value will not print, but will allow you to gauge the space needed for the field on the label and aid in proper alignment, etc.

5   In the **Prompt** field, repeat the field name typed in the **Variable** field previously.

6   Click **OK**.

This LABEL MATRIX field is now set up and available for mapping.

Setting Up Fields in LABELVIEW

In LABELVIEW, to add fields that can be mapped to fields in a BACKTRACK database, you must create these fields using a **When Printed** data source.

1   In LABELVIEW, on the left-side Object toolbar, click the button that corresponds with the type of object (text, barcode, etc.) you would like to add to the label.

2   In the **Data Source** field, click **When printed**.

    The window updates to display the boxes for defining a When Printed field.

3   In the **Prompt** field, type a name for the When Printed field. The name should allow you to easily identify this field later so you can map it to the corresponding field in the BACKTRACK database.

4   Click the **Options** tab, and in the **Field Name** field, repeat the field name typed in the Prompt box previously.

    Note: The field name can contain letters and numbers, but no spaces are allowed. So, for example, you might want to name an Employee Last Name field as Employee_Last_Name or EmployeeLastName.

5   Click **OK**.

    This LABELVIEW field is now set up and available for mapping.

Mapping Label Fields to BACKTRACK Fields

In order to print data from a BACKTRACK database on the labels you create in the Label Designer, you must first map the data fields.

1   Access the **Select Label** window according to the instructions on page 9-1.

2   Select the label for which you would like to map data fields and click **Map Data**.

The **Map Data** window appears.

Note: If you have just created a new label containing fields to be mapped, the **Map Data** window will appear automatically when you exit the Label Designer.
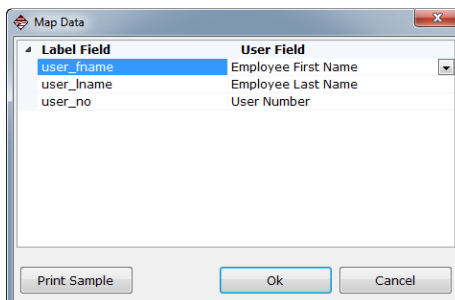
Figure 9-4 Map Label Fields to BACKTRACK Fields

The **Label Field** column on the left lists all map fields in the selected label. The **Data File Field** column on the right provides a list of fields in the selected BACKTRACK database (click on a cell in this column to display a drop-down list of fields).

3   For each label field listed on the left, click the adjacent cell on the right and select the desired BACKTRACK field to which to map the label field. Repeat this process to map all desired fields.

4   If desired, you can click the **Print Sample** button to print a sample of the label for which you are mapping fields.

5   Click **OK** when finished.

Setting Security on a Label

1   Access the **Select Label** window according to the instructions on page 9-1.

2   Select the label for which you would like to set up security and click **Security**.

The **Label Security** window appears.
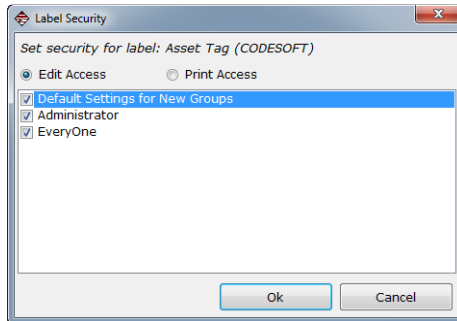
Figure 9-5 Label Security

3   Set up label editing and printing access for each user group
    using the following options:

*   **Edit Access:** The ability to modify or delete the label.
*   **Print Access:** The ability to print the label.
*   **Default Settings for New Groups:** Applies to any new
    security groups that are created.

Note: Security groups must be activated for this setting to
take effect. Selecting the **Require User ID/Password for
Maintenance** check box on the **Change System Settings**
window activates security groups. Make sure users know
their ID and system password.

Setting Up Record Selection Criteria

You can limit the number of records included in your labels by
defining selection criteria based on field values and logic
statements; and by comparing one filed to another or to a value
that you enter. You can also choose to enter selection criteria at
print time to obtain specific results each time you print the label.

1   Access the **Select Label** window according to the
    instructions on page 9-1.

2 Select the label for which you would like to set up record selection criteria and click **Criteria**.

The **Selected Records Criteria: <Label>** window appears.
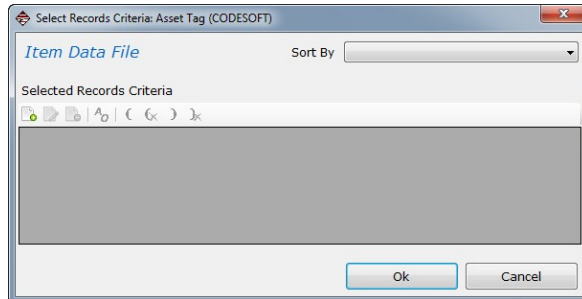
Figure 9-6 Selected Records Criteria

3 To set up record selection criteria, click **Add** and define selection criteria for the records you want to include in your labels. For example, you could search for records for all items that are currently checked out by a particular user. For information on setting criteria, see the BACKTRACK online Help.

Editing a Label

1 Access the **Select Label** window according to the instructions on page 9-1.

2 Select the label you would like to edit and click **Edit**.

The label opens in the Label Designer program.

3 Proceed to edit the label as desired. For information on designing labels, see the documentation included with the Label Designer program.

Copying a Label

1   Access the **Select Label** window according to the
    instructions on page 9-1.

2   Select the label you would like to copy and click **Copy**.

    The **Copy: Label Design** window appears.

3   In the **To New Name** field, type the name to use for the
    label copy.

4   Click **OK**.

    The new label will now be available in the list of existing
    labels if you would like to edit it.

    Note: If a label you want to copy is based on an
    application-specific database (Item, Transaction, or
    Reservation) you can save it for use with a different
    application by selecting the application from the
    Application drop-down list. If you do so, it is best to select
    another application whose database uses the same fields
    as those present in the original label.

Deleting a Label

1   Access the **Select Label** window according to the
    instructions on page 9-1.

2   Select the label you would like to delete click **Delete**.

    A prompt appears asking you to confirm your selection.

3   Click **Yes** to delete the label.

Printing a Label

1   Access the **Select Label** window according to the
    instructions on page 9-1.

2   Select the label you would like to print and click **Print**.

The **Label Print** window appears.
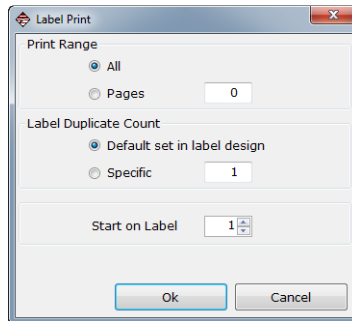
Figure 9-7 Label Print window

3   Set the following label printing options as desired:

*   **Print Range:** Allows you to print all labels or a specific number of pages (if printing from a roll of label stock, then the **Pages** setting equals the number of labels to print).

*   **Label Duplicate Count:** Allows you to print the number of duplicate labels that has been set up in the Label Designer or enter a specific number of duplicate labels to print. (The duplicate value includes the original. For example, set the duplicate value to 2 if you want to print an original label and one copy.)

*   **Start on Label:** Allows you to specify the exact label from which to start printing if you are printing multiple labels per page (printing on sheets of labels vs. a roll of label stock).

4   Click **OK** to print your labels using the default printer selected in the Label Designer program.

Converting Older Labels

If you are using LABEL MATRIX as the installed label design program and you have older labels that were created in a previous version of BACKTRACK, these labels can be converted and used in the current version of BACKTRACK.

When you open the older labels in the current BACKTRACK Label Designer (in this case, LABEL MATRIX), the fields that are linked to a BACKTRACK database will have a Database data origin. In order for these fields to successfully link to the BACKTRACK database in the current version of the software, you will need to edit each field and change its origin to Keyboard Input. See the "Setting Up Fields in LABEL MATRIX" section on page 9-5 for information on setting up LABEL MATRIX fields for mapping.

Once the fields' data origins have all been changed to Keyboard Input, then all you need to do is map the label fields to the corresponding fields in the BACKTRACK database. See the "Mapping LAbel Fields to BACKTRACK Fields" section on page 9-6 for more information.

Index

R

S

Setting the Standard

TEKLYNX

BAR CODE SOFTWARE

United States	France	Germany	Singapore	China	Japan
1-414-837-4800	33-562-601-080	49-6103-30026-0	65-6477-7293	86-21-6100-6588	81-45-461-3603

www. teklynx.com