# 6. MAINTAINING BASIC DATA

## 6.1 Introduction

This chapter describes how to maintain the following data that is required for the system to function correctly:

- special locations
- area codes
- membership types.

It also describes the steps you should take to back up Toy Tracker to ensure that your toy and member data is kept safe should anything happen to the PCs or laptops on which you run Toy Tracker.

## 6.2 Maintaining special locations

The special locations record the current position of a toy when it is not recorded as on loan or at base. Special locations include such values as damaged, lost and discarded. They are the first set displayed in the yellow **Current Location** field on the Toy Details screen. A full set is already set up on your system but you can add further special locations if required.

To maintain special locations:

**1.** Select option 6, *Maintain Basic Data*, from the Main menu.

**2.** Select option 1, *Special Locations*, from the Maintain/View Basic Data menu.

The Special Locations screen is displayed.
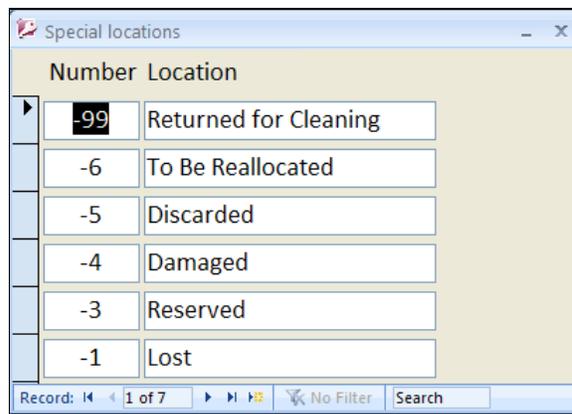
The '0' value is where the toy returns when booked in, for example this may be 'On Van', 'Ready for Hire' or 'At Base'; it is the default location.

The special locations are given negative numbers so that they appear at the top of lists.

**3.** Add a further special location by typing a negative sequence number and location, for example 'Workshop', in the record marked with an asterisk in the **Number** and **Location** fields.

**4.** Close the Special Locations window by clicking on X in its top right-hand corner.

## 6.3 Maintaining area codes

Area codes are centre-specific, that is you can decide what you record and how you record them. The purpose of the area codes is to record information for the production of statistics, to indicate whether or not a member is within catchment area. You can set up your database to recognise whether the area code you enter for a member is within or outside catchment area. The area code could, for example, be:

• a postcode

• an area name

• a Children's Centre name

• 'In' or 'Out'.

To set up area codes:

**1.** Select option 6, *Maintain Basic Data*, from the Main menu.

**2.** Select option 2, *Area Codes*, from the Maintain/View Basic Data menu.

The Area Maintenance screen is displayed.
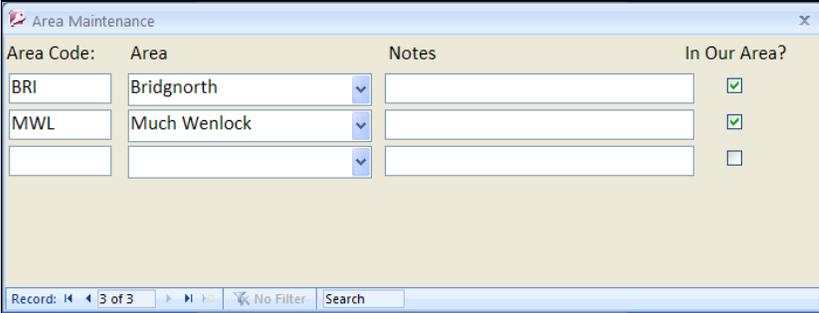


**3.** In the blank row enter the following details:

• Type the area or postcode in the **Area Code** field

• Enter the details identifying the area by completing the **Area** fields.

• Click on the **In Our Area?** tickbox so that a tick is displayed if the new area is within catchment. Leave the tickbox blank if the new area is outside catchment.

**4.** Close the Area Maintenance screen by clicking on X in its top right-hand corner.

> ✎ *It is important that you do specify whether new area codes are in catchment as this affects the statistics which may be required for funding.*

# 6.4 Maintaining membership types

The membership type determines, amongst other things, whether annual subs and loan fees apply and at what age a person's membership will expire. You can add new membership types to those already recorded on your system.

To add a membership type:

1. Select option 6, *Maintain Basic Data*, from the Main menu.

2. Select option 3, *Member Types*, from the Maintain/View Basic Data menu.

   The Member/Finance Types screen is displayed.



3. In the blank row at the bottom, type the details of the new member type:

   - Type the name for the new type in the **Member Type** field.

   - Tick the first tickbox if members of this type must pay an annual subscription.

   - If you ticked the first tickbox, specify how much the subscription is in the **Annual Subscription** field.

   - Tick the second tickbox if members of this type must pay for a toy loan.

   - If you ticked the second tickbox, specify how much the toy loan fee is in the **Toy Loan Fees** field.

   - If appropriate, enter the age at which membership expires for members of this type in the **Expire Age** field.

   - If you want to specify a loan length for members of this type, enter it in the **Loan Length** field. If you do not specify one then the system default is used.

   - Tick the third tickbox if you want to use per week fines for members of this type.

   - If you ticked the third tickbox, specify how much the per week fine is in the **Use Fines (per week)** field.

- Tick the **Deposit System?** tickbox if you want Toy Tracker to ask for deposits for specified toys at the booking out stage.

**4.** Close the Member Types screen by clicking on X in its top right-hand corner.

# 6.5    Backing up your Toy Tracker data

It is important that you back up Toy Tracker on a regular basis to ensure that your toy and member data is kept safe should anything happen to the PCs or laptops on which you run Toy Tracker.

Backing up involves copying the Toy Tracker files from the PC or laptop on which it is installed to an external hard drive or USB stick. For additional security, it is recommended that the back-up copy is then stored in a different location to the Toy Tracker PC or laptop.

You are advised to back up the data as often as possible; this may, for example, mean that you back up on a weekly basis. For some Toy Libraries a more or a less frequent schedule will be suitable.

To back up the Toy Tracker files:

**1.** Locate the Toy Tracker folder.

The Toy Tracker folder contains all the Toy Tracker files, including programs, data and photographs. It is usually on the C:\ drive and called:

   *C:\Toy Tracker*

**2.** Create a new folder on the external hard drive or USB stick.

Give the folder a name that you can easily identify as a Toy Tracker backup and include the date in the folder name. By creating a new folder each time you back up and including the date in the folder name, you will create a history of backups.

For example, for a backup made on Friday, 8$^{th}$ April 2011 you might name the folder:

   *Toy Tracker Backup 080411*

The following week you would create another folder called:

   *Toy Tracker Backup 150411*

And so on.

**3.** Copy the entire contents of the Toy Tracker folder into the new folder on the external hard drive or USB stick.

> 🖉 *Please contact Start Software on 0845 612 2402 if you need to restore Toy Tracker from a backup.*