

1.

GETTING STARTED

1.1 Introduction

This user guide explores how to use Toy Tracker from Start Software.

Toy Tracker has all you need to help with the administration and day-to-day operation of your Toy Library. It is designed for Toy Libraries nationwide, both static and mobile. The software is primarily intended for single-station use but can be networked if required. Contact Start Software if networking is required.

Toy Tracker includes the following features:

- database of members, toys and toy locations
- membership card printing, with your logo
- bar code printing on membership cards and toy labels
- colour toy catalogue production
- full loan history of each toy and each member
- subscription and loan fee record keeping
- automatic production of statements and receipts.

This user guide is organised into chapters to help you find the information that you require. The following list provides you with an overview of the information you can find in each chapter and enables you to identify which chapters are relevant to the task you wish to perform.

- **Chapter 1: Getting Started**
Provides useful background and introductory information for all readers of this guide. A useful source of general reference for users with little or no computer experience.
- **Chapter 2: Maintaining Membership Details**
Describes how to add new members to the system and to work with the details of existing members.
- **Chapter 3: Booking Toys In & Out**
Contains details on booking toys out and back in again and the shortcuts that you can use to access other parts of the system from the same screen. Also explains how to make reservations.
- **Chapter 4: Maintaining the Toy Catalogue**
Describes how to maintain the details of all toys held, provides different methods for labelling toys and printing toy information.

- **Chapter 5: Maintaining Daily Information**
Details how to manage and respond to notes on the system and how to calculate the takings.
- **Chapter 6: Maintaining Basic Data**
Describes how to maintain the special locations and area codes that support the functioning of the system.
- **Chapter 7: Producing Reports**
Provides information on finding, viewing and working with your data in reports.
- **Chapter 8: Toy Tracker Mobile**
Describes how to record toy transactions on a handheld device and synchronise the data.

1.2 Getting started with Toy Tracker

This section describes how you can begin working with Toy Tracker. It explains:

- logging on to Toy Tracker
- logging off
- moving around the screens
- selecting from a menu
- searching for records
- sorting records
- filtering data by selection
- using the record selector bar
- changing your password.

1.2.1 Logging on to Toy Tracker

To log on to Toy Tracker:

1. Double click on the Toy Tracker icon on your PC's desktop.

The Logon screen is displayed.



2. Select your username from the drop-down list on the **Logon** field.
3. Type your password in the **Password** field.
4. Click on **OK** to log on and display the Main menu.



You can now begin working with Toy Tracker.

1.2.2 Logging off

When you have finished working with Toy Tracker, close the system down by selecting option 9, *Exit Application*, from the Main menu. Alternatively, click on the **Log off/on** button in the bottom right-hand corner of the screen and then click **Exit**.

1.2.3 Moving around the screens

The following keys and their actions help you to enter information and move around the Toy Tracker screens:

Key	Action
Tab	Moves cursor forwards from field to field
Enter	Moves cursor forwards from field to field
Shift+Tab	Moves cursor backwards through fields
Esc	Deletes changes made to a field
Esc, Esc	Undoes all changes made to the current record
Shift+Enter	Forces a save

1.2.4 Selecting from menus

Whenever a menu is displayed, you can select an option from the menu by using one of the following methods:

- use the mouse to point and click on the text of the option you require
- use the mouse to point and click on the number button of the option you require
- type the number of the option you require.

Option 9 on all menus takes you back a level in the menu hierarchy. On the Main menu, which is the first menu, this means that option 9 exits the application.

1.2.5 Searching for records

Whenever you want to search for a particular record in Toy Tracker, you can use the Find facility to help you locate it. To use the Find facility you must know some of the details of the record you are searching for.

To perform a search:

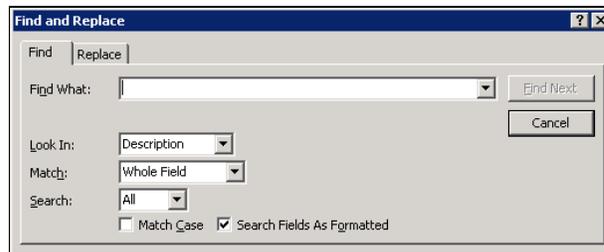
1. If you want to search for information in a specific field, click on the field you want to use for searching.

If you do not select a specific field, the search is performed on the whole screen.

2. Click on the Find button:



or press **Ctrl+F** to display the Find and Replace dialog box.



3. Type your search text in the **Find What?** field.
4. Set the **Match** field to either 'Whole Field' or 'Any Part of Field' depending on whether you want the search to match your search text precisely or to find the text as a selection anywhere in the field.
5. Click on Find Next (or press **Enter**) to display the first matching record.
6. Click repeatedly on the Find Next button or scroll through the returned records, by using the arrow buttons on the record selector bar, until the required record is displayed.

1.2.6 Sorting records A-Z and Z-A

The sorting facility enables you to sort the records displayed on your screen using the field that you choose. You might, for example, in certain circumstances find it useful to sort the member list by first name. You can sort records alphabetically from A to Z, or in reverse alphabetical order from Z to A.

To sort records:

1. Click in the field which you want to use for sorting.
2. Click on the A-Z  button to sort the records alphabetically, or the Z-A  button to sort the records in reverse alphabetical order, on the selected field.



When these buttons are available, you can find them on the ribbon at the top of the screen and also on the right-click menu.

Some screens, for example the Browse Member List and Browse Toy List screens, provide sort buttons to sort records alphabetically. Simply click on the column heading to sort the displayed records in alphabetical order (a-z) for the selected field. Click again on the same column heading to reverse the order (z-a).

1.2.7 Filtering data by selection

Some screens, for example the Browse Member List and Browse Toy List screens, provide filter fields to help you search for records. These enable you to:

- select the value you require for a field from a drop down list. The information displayed can be further reduced by making selections in more than one field.
- begin typing the value you require for a field and allow Toy Tracker to auto-complete the entry. Keep typing your selection until the auto-completion displays the required value, then press **Tab** to make the selection.

To remove these filters and return to the full list, click the Reset Filters button:



On other screens you can filter the data displayed to hide all the data that you do not want to see. This enables you to display only the records with which you want to work.

To filter by selection:

1. Click in the field that contains the data you want to filter, then right-click or click on the Filter button on the ribbon:



A menu is displayed.

2. Select *Text Filters* from the menu and the option of your choice from the sub-menu.
3. Supply any necessary parameters for your selection, for example if you have selected *Begins With...*, type the letter you require.

The list now shows only records matching your selection.

4. Repeat steps 1 – 3 as necessary to refine the search.

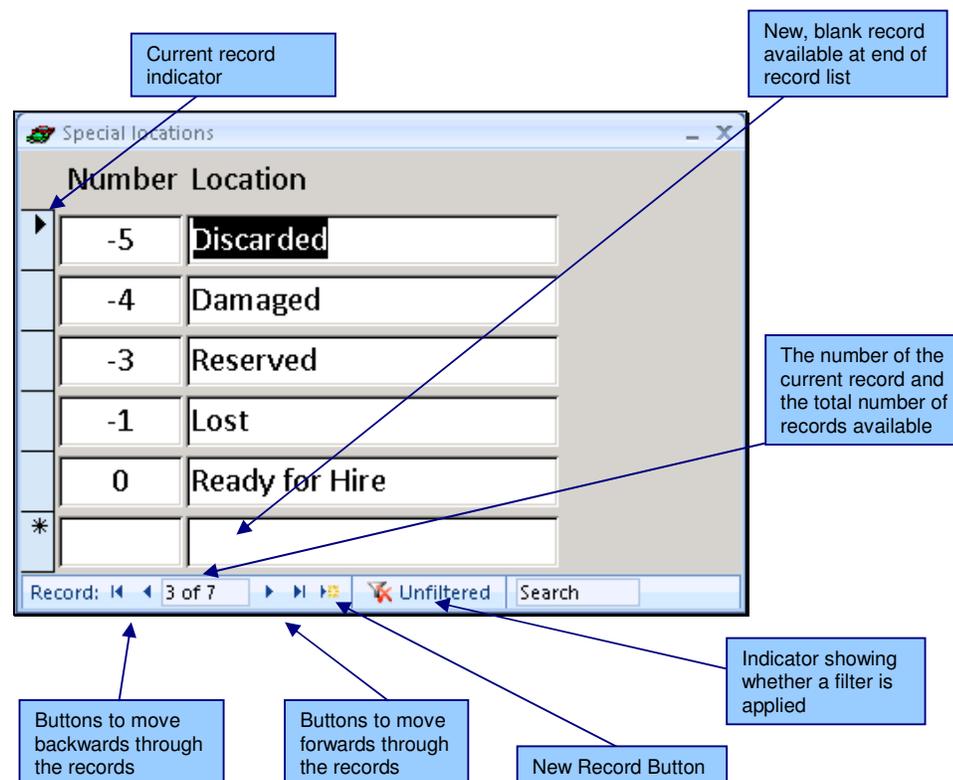
If you select another field from the filter-limited list, and select another filter, the records displayed are those that match both criteria.

The filter remains in effect until you remove it.

5. If you wish to remove the filter, select the *Clear filter from* option from the right-click menu or click on the Toggle Filter button on the ribbon.

1.2.8 Using the record selector bar

As you get used to Toy Tracker you will notice that you work with records of differing types in the same way. This section explains some of the basic tasks that you can perform to work with records, using a typical screen as an example.



Creating a new record

You can create a new record by typing into the blank record at the end of the record list (this blank record is sometimes marked with an asterisk). As soon as you start typing into the blank record, a new blank record is automatically created.

If there is no blank record displayed, create one by clicking on the New Record button.

Editing a record

You can edit a record by clicking on it to make it the current record and then typing your amendments.

Deleting a record

To delete a record:

1. Click on the record you want to delete.
2. Press the **Delete** key. A dialog box asks you to confirm the deletion.
3. Click on **Yes** to confirm the deletion.



Not all screens allow you to delete records.

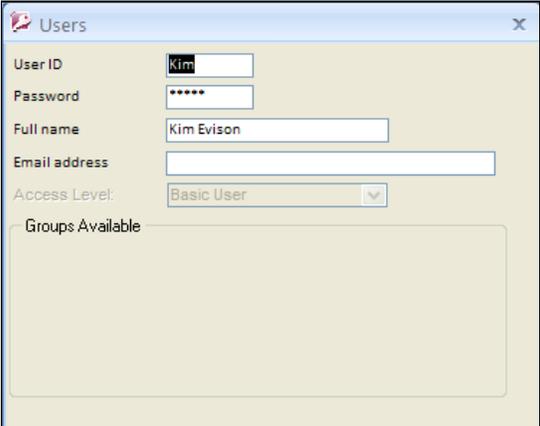
1.2.9 Changing a password

Toy Tracker may require a password when you log on to the system. You can change this password as necessary to maintain security. As a Basic User you have the authority to change your own password and email address. A Super User, however, is able to change their own and other users' details. They can also add new users to the system, specify their access level and, if appropriate, which data groups the user has available.

To change your own password:

1. Select option 8, *Change Personal Details*, from the Main menu.

The Users window is displayed, showing your user ID and full name.



The screenshot shows a window titled "Users" with the following fields and controls:

- User ID: Input field containing "kim"
- Password: Input field with masked characters "*****"
- Full name: Input field containing "Kim Evison"
- Email address: Empty input field
- Access Level: Dropdown menu showing "Basic User"
- Groups Available: A large, empty text area below a small header.

2. Type the required new password in the **Password** field.
3. Save your changes and close the Users window by clicking on X in its top right-hand corner.

If you are logged in as the Super User, then you can also scroll through all the users' details by using the next and previous record buttons. When the required details are displayed, you can set the following:

- user ID
- password
- full name
- email address
- access level – use the drop-down list to make a selection
- data groups – tick the groups to which the user is to have access.