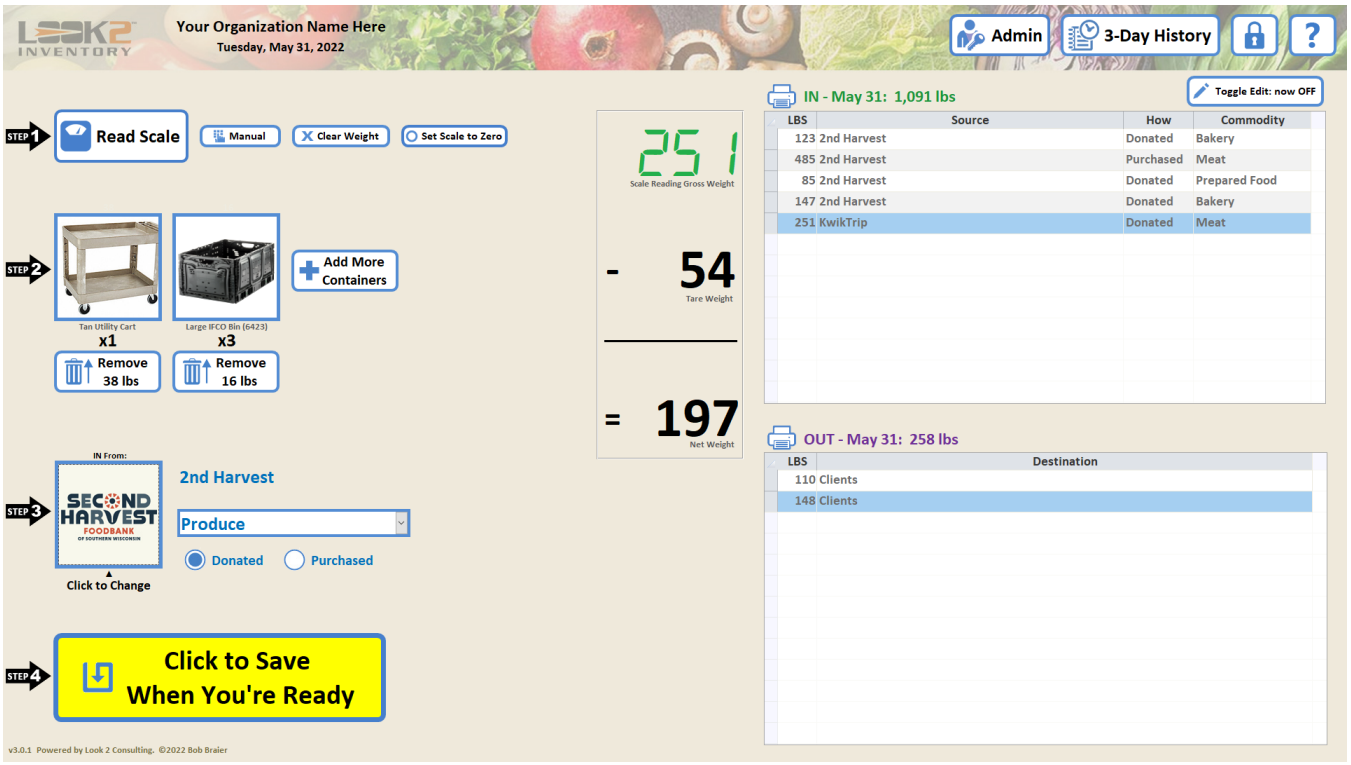
Look2 Inventory

Software

v3.2

Manual



This Document Updated:

May 21, 2024

Table of Contents

1 Overview

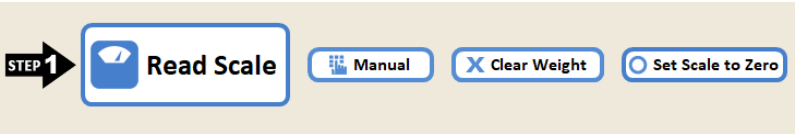
The Inventory Software helps track what is coming and going out of your organization. It can interface with a scale's readout unit, subtract (tare) cart and container weight, categorize the items by type, and designate where they came from (or are going to). The system also generates reports, including summaries for Feeding America's MealConnect system.

INSTALLATION NOTE: If you have not yet installed the software, or need help initially launching the program, please refer to the *Look2 Inventory Quick Setup Guide* PDF available on the web site support page.

2 Operational Use – Steps 1-4

The system has been designed to make use of a touch screen, and there are four (4) simple steps for processing inventory: reading the scale, subtracting the container weight(s), identifying what/where the entry is for, and saving the results.

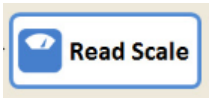
2.1 Step 1: Scale Reading – Gross Weight

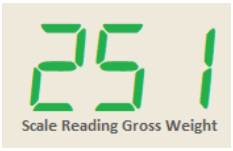


The first step is to identify the Gross Weight of the item(s) being weighed.

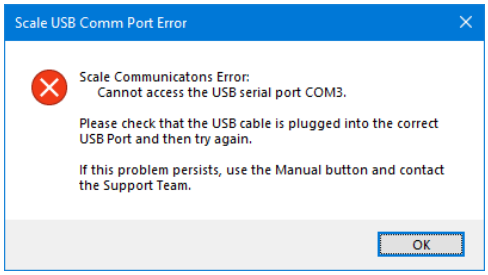
2.1.1 Read Scale

The software can be configured to communicate with an electronic scale, usually via an RS232-to-USB cable. Details on setting this up are covered in Section 7. If this is the case for your location, simply press the Read Scale button. The software plays a sound indicating that communications is taking place, obtains the gross weight from the scale, and enters it into the system automatically. Any decimals are rounded to the nearest whole number *(exception: 0.1 to 1 rounds up to 1)*. In the example shown, 251 lbs is the gross weight from the scale.





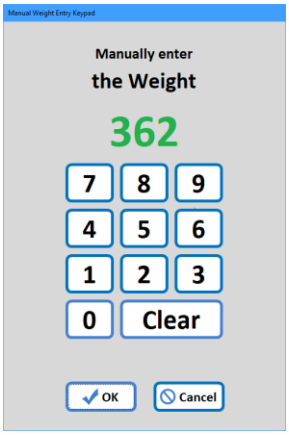
If you press this button and the software fails to communicate with a scale, the following message appears, and "Err" appears where the weight is normally shown:



Make sure the scale is turned on, that the cable is connected on both ends, and the software is properly configured to communicate with your brand of scale (as outlined in Section 7). Also make sure the scale reading was "stable" (i.e., it was not fluctuating at the time of the reading).

2.1.2 Manual Data Entry

If you do not have a scale connected (or it is currently not working), or you simply want to manually enter a value, you can click the Manual button.



A pop-up window appears with a numeric keypad allowing for entry of the gross weight.

Simply tap the numbers using a touch screen and/or mouse. Alternatively, a keyboard may be used for data entry.

Value range: 1-9999 (after 4 digits have been entered, the numeric keys become disabled).

Clicking the OK button enters the value as the gross weight for the scale.

2.1.3 Clear Weight

Pressing the Clear Weight button will reset the Gross Weight in the software to dashes.

This does not affect the scale itself (i.e., it does not clear the physical scale's reading, nor reset it to zero). Rather, it simply clears the value obtained in Step 1 that is shown within the software.

2.1.4 Set Scale to Zero

Occasionally the scale itself can sometimes "drift" by a pound (e.g., when nothing is on the scale, it might read +1lbs or -1lbs). Typically, there is a button on the scale itself for re-setting it to read zero. As a convenience, this functionality is also provided within the software.

Simply press the Set Scale to Zero button, and the software will send a command to the scale for it to re-zero its reading.

As with the Read Scale Button, if there is an error in communications, a dialog appears asking the user to check the connections. See Section 2.1.1 for further details.

There is another use for this button: that of performing a series of "Unstack Mode" operations (whereby a pallet of product is partially unloaded and recorded). This process may or not be enabled for your particular sight. It is described in the next section.

Also, if there is no "Zero/Tare" command available for your brand of scale (settings parameter 6), this button may be hidden altogether.

2.1.5 "Unstack" Mode

The software has an optional mode for reading scale values: "Unstack Mode". It was created so larger loads containing multiple product categories (e.g., a pallet with multiple items) could be more efficiently weighed without first having to separate them.

This is enabled via the CONFIG parameter 17 (see Section 6.6):

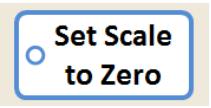
17	Allow Unstack Mode	True

If True, the Set Scale to Zero button becomes larger (since it becomes 'normal' to use this button). It also permits the software to read in negative values from the scale and use those as valid weights, as explained below. NOTE: this is only available if a Zero/Tare command is defined for your scale.

The general Unstack Mode process is as follows:

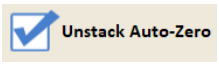
A. Place the entire pallet (or other such container) onto the scale. The scale itself thus shows the combined full weight of everything.

B. Press the Set Scale to Zero button. The scale itself now reads 0lbs.



C. Unload one of the product sections, taking it off of the scale. The pallet is thus lighter, and the scale shows a negative weight for what was removed.

D. Press the Read Scale button. Because "Unstack Mode" is allowed via settings, a negative value reading is permitted. It represents the weight of what was removed! The weight is shown as a positive number, and an "Unstack Auto-Zero" box appears.



E. Finish the normal Steps 2-4 for recording the reading into the system (i.e., the container weights if any, source/destination selection, save data).

F. With that "sub-portion" of the pallet now recorded, repeat steps B thru E for each subsequent portion of the pallet. If the Unstack Auto-Zero box is checked, step B is done automatically.

Example:

Suppose a user has a 65lb pallet containing 4 different product categories that weight 75, 200, 325, and 400 lbs. respectively, and each should be recorded separately. Rather than having to unload each of the 4 sections by first moving them onto the scale, weigh them, and then move them off of the scale, they would instead use the Unstack process and move the product once, not twice:

Step A would read 1065 lbs. (the sum of the 4 weights plus the pallet itself), but it gets reset to 0 in Step B. After unloading the first set of products, the scale would read -75lbs. That 75 lbs of product would be categorized and recorded, and the scale once again reset to 0lbs.

Once the scale reads 0 again, the 2nd portion of product would get unloaded, and the scale would thus read -200lbs. That would get recorded, and the scale again set to 0.

Once the 3rd portion gets unloaded from the re-zeroed scale, it would read -325 lbs (the weight of just that 3rd group of stuff), and so those 325 lbs would be categorized and saved.

The scale would be reset to 0 and the fourth group removed, with the scale reading -400 lbs. This, too, gets assigned and saved.

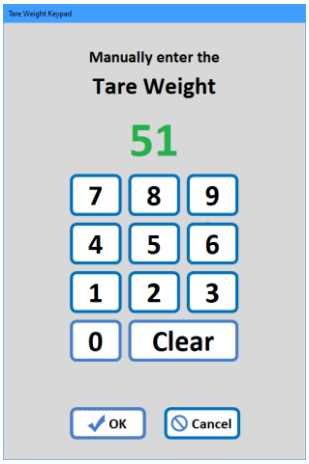
Finally, only the pallet is on the scale. Once it gets removed, the scale would read -465 lbs (if the user didn't bother to reset the scale to 0 after the final valid reading). The user would reset the scale to 0 one last time so it's ready for the next user.

2.1.6 No Scale Configured

If there is no Scale Com Port configured, the software will disable the Read Scale button and hide the Set Scale to Zero button. It also makes the Manual button larger. This is for sites wishing to use the Inventory Software without the scale interface.

2.2 Step 2: Cart/Container Selection – Tare Weight

After getting the Gross Weight, the next step is to subtract the weight of any carts/containers used to hold the inventory items (also known as the Tare weight). The software automatically does the math for you and allows several methods for identifying the amount that should be subtracted from the Gross Weight.



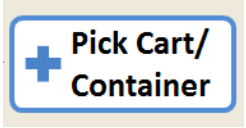
2.2.1 Manual Entry

If no Cart/Container has been selected, you have an option to directly enter a Tare Weight manually by clicking on the blue number in the Tare Weight indicator. Enter the desired Tare Weight using the pop-up keypad, or use an attached keyboard.

NOTE: if a Cart/Container gets selected, this manual entry is replaced by the weight of the object chosen, and this direct entry becomes disabled.

2.2.2 Carts

A pre-defined cart tare weight can be chosen by first clicking on the Pick Cart/Container button. A selection window appears, with the carts listed in the top section.

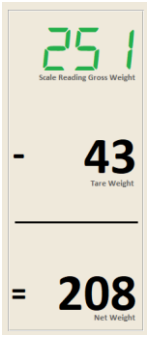


Of course, these are more than just “carts” per-se ... that is just the term used to describe the larger containers of which there is typically 1 per weighing entry. These are usually the main/ heavier object holding inventory (e.g., pallets, dollies, etc.).

NOTE: if there are more carts/containers defined than can fit on the screen, a scroll bar appears. You can use that to scroll up/down, or if using a touch screen you can simply swipe up/down using your finger within the icon list.

Tapping an image will select it and automatically subtract its associated Tare Weight from the Gross weight to calculate the Net Weight. In the example shown to the right, the Gray Utility Cart #8 weighing 43 lbs. was selected and thus subtracted from the 251 Gross Weight to give a Net Weight of 208 lbs.

(NOTE: if a container has a negative weight defined, it effectively then "adds" it to the net weight. Such entries have a green weight. This can be used for "adding" pre-defined boxes to a total weight without having to put them on the scale.)



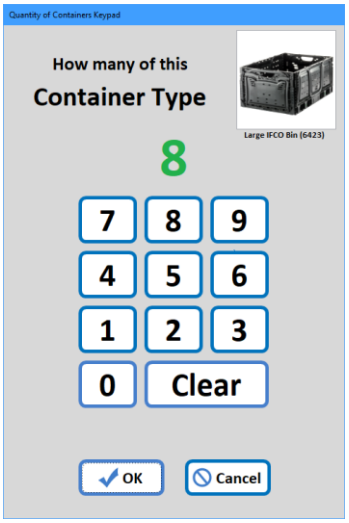
2.2.3 Containers

The lower portion of the Carts/Container selection window has a list of items which are typically smaller and lighter, and of which there may be multiple per weighing session.

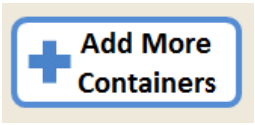
For example, there may be 8 Large Collapsible Bins containing the vegetables that are being weighed. These bins weigh 5 lbs each, and so 40 lbs needs to be taking into account.

When selecting these containers in the lower-half of the selection window, you are prompted to enter how many of them are on the scale. Pressing OK will then enter these into the Tare Weight.

The number selected will also be shown below that container's image (e.g., "x8"), and its total weight shown within the Remove button.



2.2.4 Add More Containers

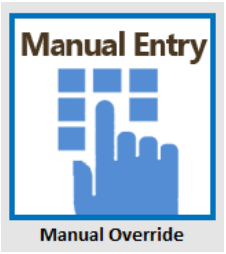


If there are more than one type of cart/container in use for any given weighing session, you can specify additional containers by pressing the Add More Containers button. This brings up the selection window again, and the selection gets added to previous selections to determine the total Tare Weight.

In the example below, 1 Utility Cart, 3 Collapsible Bins, 8 Snack Bins and 2 Banana Box Bottoms are added together to arrive at a total tare weight of 76 lbs.

A total of 4 different types of container selections are allowed per session. If more than that exists for a given weighing session, use the Manual Entry option to enter a combined tare weight.

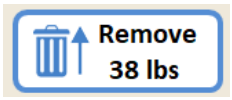
2.2.5 Additional Manual Entry



While there is an overall manual entry for the entire Tare Weight (see 2.2.1), there is also a Manual Entry option available in the Cart/Container Selection Window (located at the right).

This is used when there are containers to be added to the Tare Weight, but for which there are no icon selections already defined (for example, a driver brings in a dolly of known weight to carry in the boxes). Clicking on it will prompt the user for the additional Tare Weight to use.

2.2.6 Removing a Cart/Container



If something was added as a tare weight and it should not be used (e.g., something was selected by mistake), it can be removed from the calculations by pressing the Remove Container button (it shows the number of pounds used in the tare calculation).

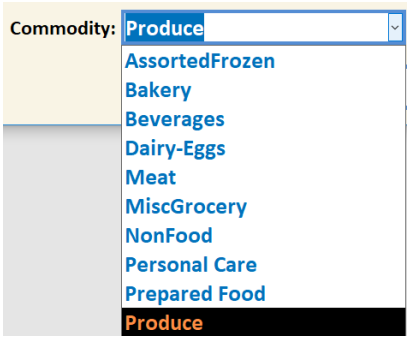
2.3 Step 3: Source/Destination Selection

After the weight has been properly calculated, Step 3 is to identify the "what & where" for the inventory.

Tapping the image next to Step 3 will bring up the Select IN/OUT Entry Window. An example is shown below (yours will have different selections, depending upon your organization's configuration):

At the top are the "IN Sources" and at the bottom are the "OUT Destinations". If there are more icons than can fit on the screen, you can scroll through the icon list (touch-screens can simply flick through the list).

2.3.1 IN Sources

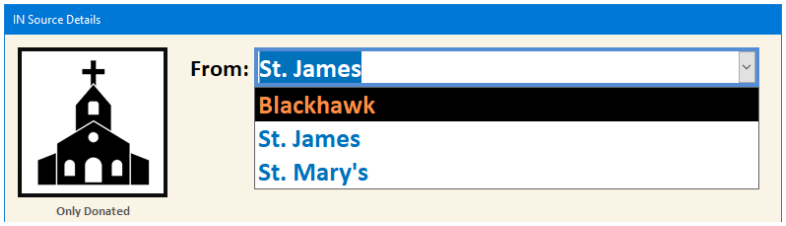


When an IN Source is chosen, not only is the name selected but the user can also select the type of commodity that is coming into your organization. The choices are configured via the Commodities setup (see Section 6.3). A typical example of commodity selection is shown to the right.

Depending upon how an IN Source is configured, several other options may appear.

- Selection of whether the item was donated or purchased. *Note: for the selected source, if either the CanPurchase or CanDonate options are set to False (not checked), these radio-button choices will not be shown.*

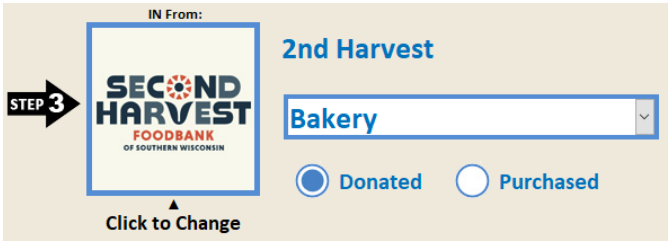
- If the IN Source is a "Group", then an additional dropdown list of group members is shown for the user to select the specific source. For example, if the group "Churches" was selected, a dialog appears asking which church the donation is coming from:



Group configuration is described in Sections 4.3 and 4.8.5.

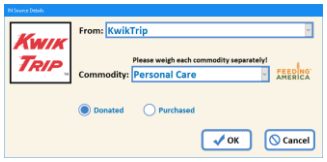
- If the IN Source has its Feeding America box checked, a logo appears as well as a reminder to weigh each commodity separately (for more accurate MealConnect reporting).

  - Once an IN Source has been selected, its donated/purchased status and/or commodity can be changed directly from the main screen. If a group was selected, other group members may also be chosen.

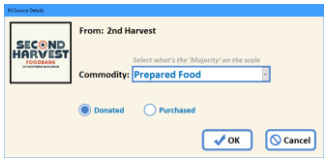


The overall IN Source itself can also be changed by clicking on the icon.

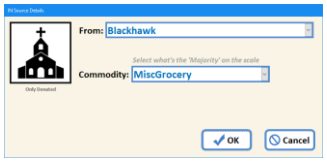
Note: Based upon how any give IN Source is configured, the additional pop-up may or may not show various elements (or the pop-up may not even appear at all). Some examples are shown below.



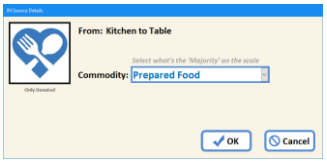
All 3 elements (also F.A.)



No Location (not a group)



No Purchase Option



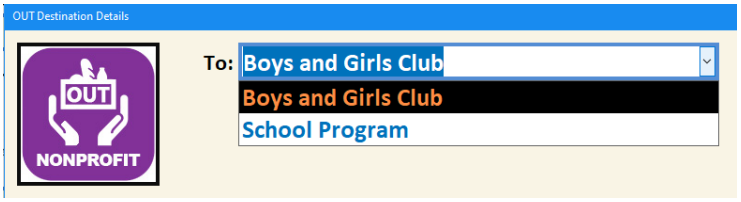
No Location or Purchase

2.3.2 OUT Destinations

Selecting an OUT Destination is very similar to an IN Source, but without the Commodity and Donation/Purchase selection options.

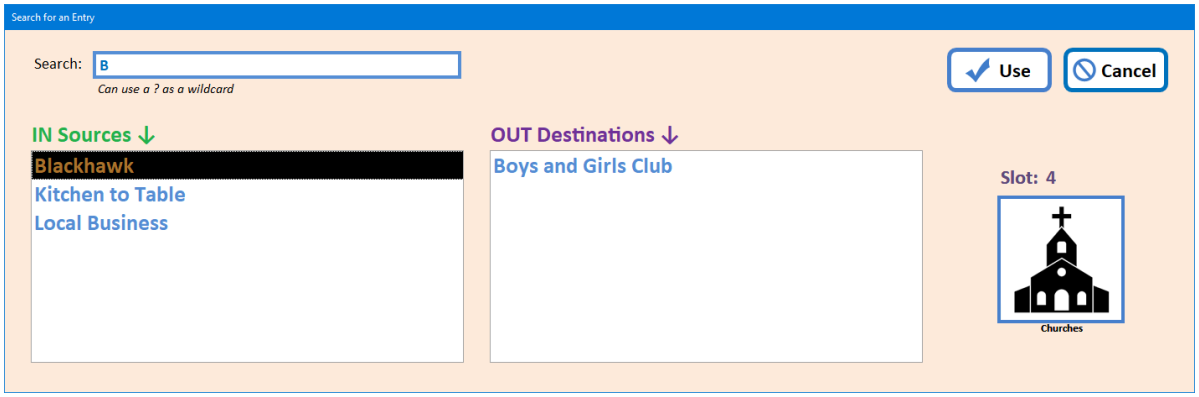
If it's a group name, you will be prompted to identify the specific OUT Destination within that group.

The example shown here is for the NonProfit group selection, and the user is selecting the Boys and Girls Club as a destination for the food going out of your organization.



2.3.3 Search IN/OUT Feature

If your organization has many IN or OUT entries (or many members within groups), you can elect to use the Search feature by pressing the Magnifying Glass search button at the top of the IN/OUT Selection screen. It brings up the search dialog:



As you type in the search field, IN Sources and OUT Destinations that match will be shown in their respective lists. Click on an entry to show which slot that entry is in and to view its Icon. You can then either click Cancel to return to the Selection screen, or press the Use button to make that your selection.

2.4 Step 4: Save Data

Once the weight has been read in, the tare weight subtracted, and the Source/Destination determined, the data is ready to be saved to the database.

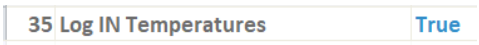
Simply press the SAVE button.

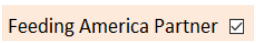
A tone will be played, and the record will appear in either the IN or OUT table on the right-hand side of the main screen.

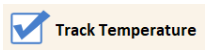
2.5 Optional: Log Temperature

Some organizations need to record the temperature for refrigerated and frozen items coming in from Feeding America partners. You will be prompted for a temperature whensaving a record, as long as the following criterial are met:

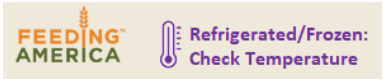
- the "Log IN Temperatures" must be set to True in the Settings Screen (entry 35)
- the IN Source has its Feeding America Partner box checked
- the IN item is designated as Donated
- the IN item has a Commodity selected that has its Track Temp set to Yes/True



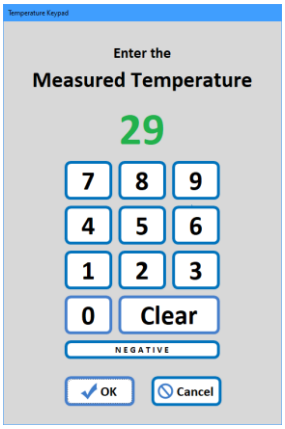




You will be reminded to check the temperature before pressing Save via the message shown:



Once you press the Save button, a keypad pops up a llowing you to enter the measured temperature.



Use the NEGATIVE button to record temp eratures below 0. Pressing it toggles it to instead read POSITIVE, thus allowing for a correction if that button was accidentally pressed.

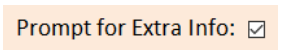
If you press Cancel, the record is not saved.

If you press OK, the temperature gets recorded along with all the other information for the record. These temperatures are only viewable via the Temperature Log Report found in the Reports Screen.

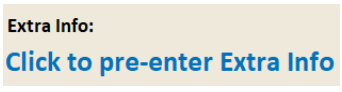
2.6 Optional: Extra Info (Track Associated ID, Notes, etc.)

Some organizations wish to track the associated household ID with the inventory weights going out. Others want to track the ID of the driver bringing food in. Still others, additional commodity details. The software can log this extra information (up to 50 alphanumeric characters) as an entry for both IN and OUT records.

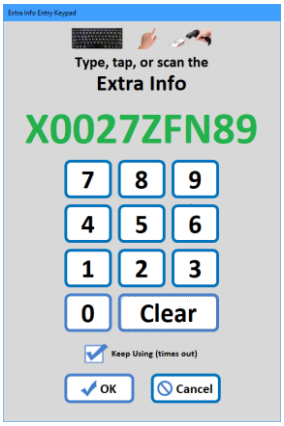
To use this feature, the "Use Extra Info" must be set to True (Settings Screen entry 12), and also the "Prompt for Extra Info" must be checked for any IN Source or OUT Destination you wish to track the exta information *(editable via the Edit In/Out Selection for Administrators).*



When an IN/OUT entry with this enabled is selected, a label next the Save button appears, letting you know more info is required:



If your process has you enter the info prior to reading the scale weight, click the blue text to bring up the prompt to type, tap or scan the info. Alternatively, if the info has not been entered and the Save button is pressed, the software automatically prompts for the data prior to saving.



Check the "Keep Using" box if multiple entries will use the same info. It gets reset after 3 minutes of not saving a record.

You can optionally use a barcode scanner to enter IDs when the keypad prompt appears. Simply connect one to the PC's USB port and make sure the scanner software driver is installed.

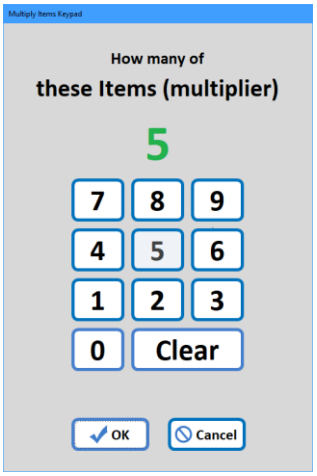
2.7 Optional: Multiply Items

Some organizations having just a small scale wish to weigh just 1 box and then enter how many identical boxes they have, allowing the software to then multiply to get the final weight.

In order to use this feature, the "Allow Multiplying of Net" must be set to True *(editable via the Settings window for Admins).*

When turned on, a button appears just above the Net Weight value. Pressing it allows for an entry of how many units (1 to 99) to multiply by in order to arrive a total Net Weight.

The button then updates to show the number of items (background changes to green if not 1 so people know it's being used), and the Net Weight = (Gross Weight – Tare Weight) X (multiplier).



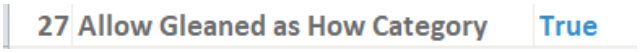
NOTE: if the resulting weight is greater than 32,767 lbs (an internal upper limit), the software resets the multiplier to 1.

When the data gets saved, this value reverts back to 1 if the "Reset Multiplier On Save" settings parameter is set to True.

2.8 Optional: Gleaned as How Category

Some organizations wish to have "Gleaned" as a How Category in addition to "Purchased/Donated" (a distinction of donated items that are actively gathered through pick-ups, rather than items being dropped off).

In order to use this feature, "Allow Gleaned as How Category" must be set to True *(editable via the Settings window for Admins)*:



and set Can Glean to True (checked) for any IN Source for which Gleaned can be an option (editable via the Edit In/Out Selection window for Administrators).

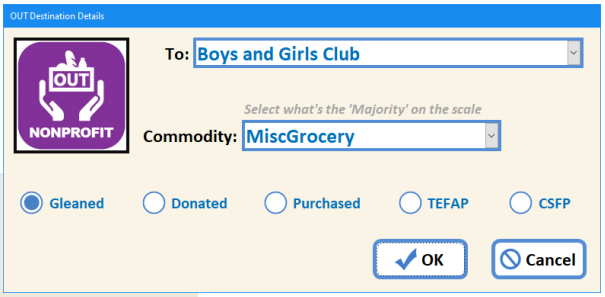
NOTE: as of this writing, Gleaned data is included in the built-in Access reporting, but it has not yet been incorporated into the Excel data tool. If your organizations desires this to be in those Excel files, please contact Look 2 Consulting with this request.

2.9 Optional: Log Commodity/Category (& TEFAP, CSFP) for OUTs

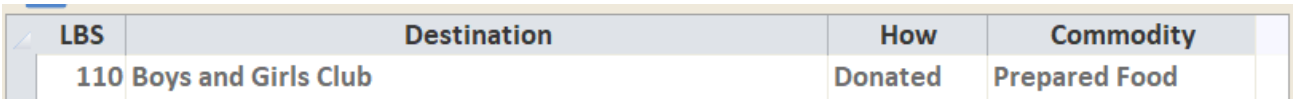
Some organizations wish to log the Commodity type (e.g., Produce, Dairy, Meat) and the How Category (e.g., Purchased, Donated, Gleaned) not only with the IN Sources, but also with the OUT Destinations. There is also an option to include TEFAP and CSFP as How Categories for OUTs as well.

In order to use these features, set "OUT Logs Category, Commodity" and "OUT Allows TEFAP, CSFP" to True (editable via the Settings Screen for Administrators)

When an OUT Destination is selected, those choices are made available prior to saving the weight record.



The Out Tables on both the main screen and the Historical window show these additional two columns.



LBS	Destination	How	Commodity
110	Boys and Girls Club	Donated	Prepared Food

NOTE: the Out Category/Commodity data is not included in the built-in Access reporting, nor the Excel data tool. If your organizations desires these, please contact Look 2 Consulting with this request.

2.10 Lock Screen

After using the system, you have 2 options:

- Leave the system on the main entry screen so it's ready for use
- Lock the screen using the Lock button

If you do the latter, the lock screen appears, taking up the entire screen.

Press the Lock button again to unlock and return to the main screen.

If a password has been configured for the Lock/Unlock action, a dialog asks for the correct password. Failure to enter the correct password will keep the lock screen on.

If there is no password configured for the Lock/Unlock action, no prompt is presented, and the user is simply taken directly to the main screen.

2.11 Switch to Other Look2 Software (Volunteer or Registration)

While it is recommended that the Inventory software run on its own machine, there are some smaller food pantries wanting to run either the Volunteer or Registration software on the same machine as the Inventory Software.

If the Inventory Software detects that either software is indeed running (it checks at startup, as well as every time a record is stored to the database), an additional button appears at the top of the screen.

Pressing it will bring up that software to the front.

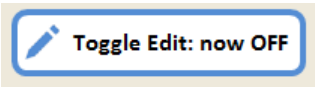
3 Supervisor Functions

Occasionally someone will make a mistake and log an incorrect entry into the system. For example, a family getting food has their cart weighed and recorded, but at the last minute wants to add a gallon of milk. Since the weight was already recorded into the database, they can either record a whole new entry just for the milk, or they can elect to edit the weight already recorded, adding 8 more pounds to the total. Another example is someone picks the wrong church for a given donation, and now wishes to correct the recorded entry.

3.1 Edit Record from Today

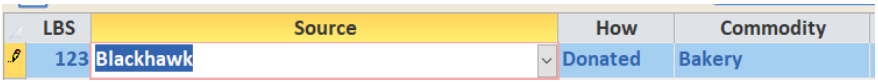
If the entry is from today, it appears in the main IN or OUT table on the main screen. At the bottom of those tables is a button.

By default, the tables are not editible (so someone doesn't accidentally activate an edit via the touch-screen) and the button is entitled: Toggle Edit: now OFF.

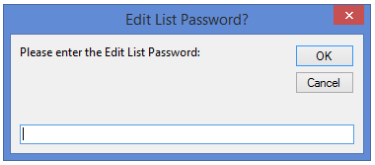


Pressing this button will enable the editing of these 2 tables, and the button will change to indicate that this editing feature is now ON.

Users can now edit individual entries by clicking on the fields within the tables.



Pressing the "Toggle Edit: now ON" button will once again turn it back OFF.

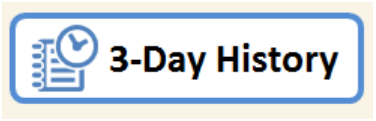


NOTE: you can optionally password protect this feature via Settings.

3.2 View and Edit Records from 3-Day History

Sometimes a mistake is caught after the weekend (e.g., someone enters something on Saturday, but it's not until Monday that a supervisor wants to correct the entry).

To help facilitate these "short-term" corrections, a 3-Day History button is located at the top of the screen.



It pops up a window showing the entries for the last 3 days, and also has a Toggle Edit button.

For organizations logging Associated IDs or Temperatures, this screen also shows those in the tables.

3.3 Accessing the Desktop

The software was written to make full use of the entire screen, without the usual Windows Close/Minimize controls in the upper left corner, so it's more of a "kiosk" type of application. (Note: there is an option to show a Minimize button whenever the Admin is logged in).

If you want to keep the software running, yet gain access to the Desktop and/or other applications:

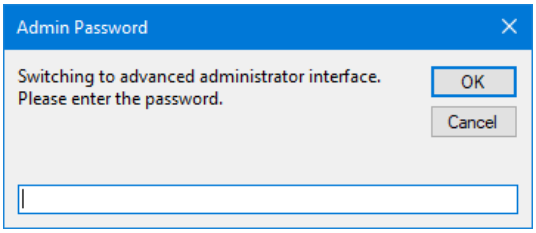
- Press the Windows key *(between the CTRL and ALT keys on the keyboard)*. This brings up the taskbar and windows menu, allowing you to then launch another program.

- While holding down the ALT key, cycle through running programs with each press of the TAB key … then let go of the ALT key to bring that window to the front.

4 Administrative Functions

There are some additional functions reserved for administrators (anyone in your organization who's been given the Admin password to thus access these features).

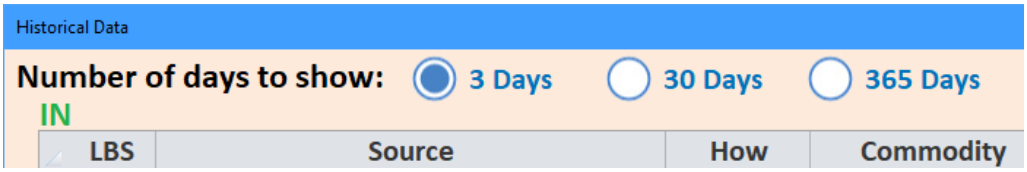
To enable these extra functions/features, press the Admin button at the top of the screen, and enter in the correct password.



4.1 Edit Record from 3,30,365 Days

When loggedin as Admin, the 3-Day History button changes its name to 3,30,365-Days.

In the History pop-up window, there are now choices at the top of the screen to extend the data view back 30 days or even 365 days. Simply click on the appropriate option and you can then view/edit those records.

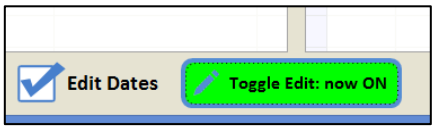


4.2 Edit Entry Date via History Window

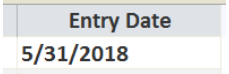
In the 3,30,90-Days History window, the right-most column in the IN and OUT tables show the date and time that the entry was recorded into the system. There is a separate field in the database which stores the "Entry Date", which is the date associated with the IN or OUT event. In general, the Entry Date matches the date portion of the "Date Recorded" entry (i.e., the record gets created on the same day as the inventory coming in or going out).

However, sometimes items come in or go out and are recorded by some other means other than directly in the software (e.g., getting a report from a food bank for the items for the previous month). These can be manually entered in the software (by using the Override/Manual-Entry for the scale reading). But since these are for dates in the past (other than when the record gets created in the system), there's a need to be able to change the "Entry Date".

When logged in as Administrator, the History Window has an "Edit Dates" checkbox at the bottom.



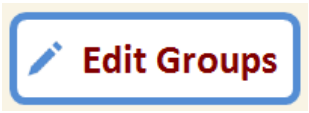
By checking this box and toggling the edit to On (when it's green), the last column changes from "Date Recorded" to instead be "Entry Date".



You may edit the date associated with the entry. Only the Entry Date changes; the Date Recorded remains the same (to show on what date the entry was created in the system).

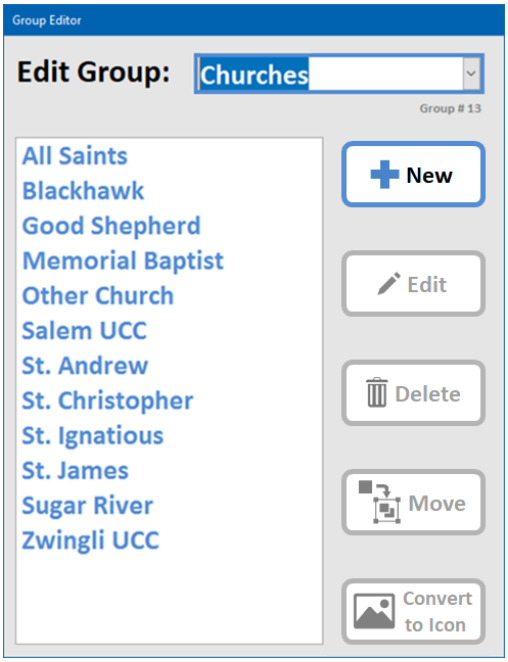
The list will refresh if you either toggle the Edit Dates checkbox or select a different timeframe (3, 30, 365 days). So, if you change a date to 2 weeks ago and you have 3 days as the current time-frame, the entry you edited will "disappear" if you toggle the Edit Dates checkbox. You can get it to reappear in the list again by changing the timeframe to 30 days.

4.3 Edit Groups



An Edit Groups button appears at the top of the main window.

Clicking this button brings up the Group Editor. *(You can also get to this function when editing a group IN/OUT Icon Entry).*

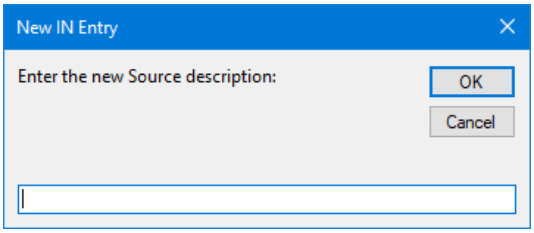


Select which group you wish to edit from the dropdown at the top of the dialog. *(If you pick "Other – IN", it reminds you that "Other In" is always a choice that cannot be changed).*

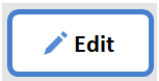
The list gets populated with all of the members of that group (the group number is also shown just below the dropdown list).

4.3.1 Add New Group Member

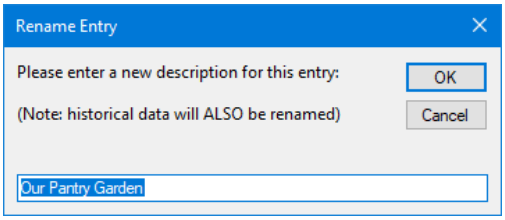
Click the **+ New** button to enter a new, unique name which gets added to the selected group. The software checks for duplicate names, not only within this group, but for ALL choices in the entire system.



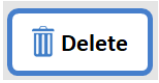
4.3.2 Rename Existing Member



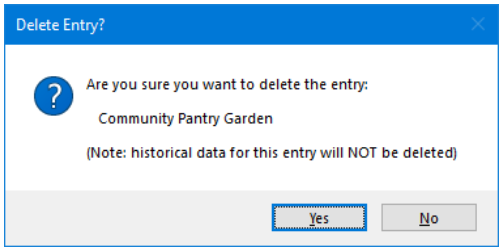
Select an existing entry in the list and click the **Edit** button to rename an entry. As with creating a new entry, the software checks for duplicate names, not only within this group, but for ALL choices in the entire system. If a unique name gets entered, the software renames not only the selected choice, but also all entries in the historical data with that same name so the records match.



4.3.3 Delete Existing Member



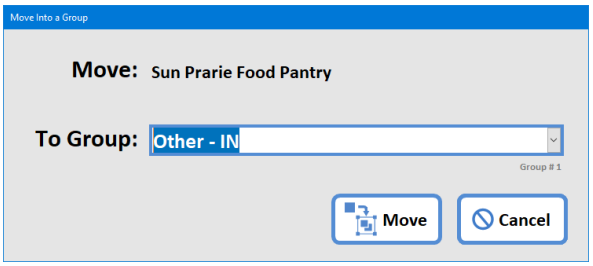
You can also **Delete** a selected entry. While this deletes the choice moving forward, it will NOT delete any historical data for that entry. NOTE: if a source having historical records gets deleted, that name gets moved to a special group called "Ω Archived" *(the omega character is used so that it appears at the bottom of the group list).*



4.3.4 Move Existing Member

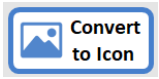
You can also **Move** a selected entry.

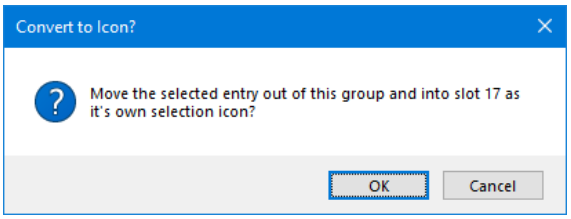
In the dialog that appears, simply select the new group from the list and press Move.



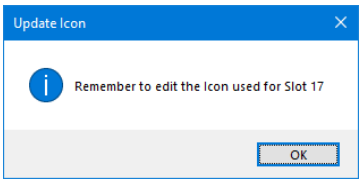
4.3.5 Convert Existing Member to Icon

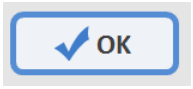
You can also take and existing group member out of the group and instead create its own icon selection.





The software finds the first open slot in the Icon selection screen and tells you the number to be used. While the default parameters are taken from the group, the image is not copied. Therefore, after using this feature, it's best to go into the IN/OUT Editor to update the Icon used, as well as confirming the other settings.





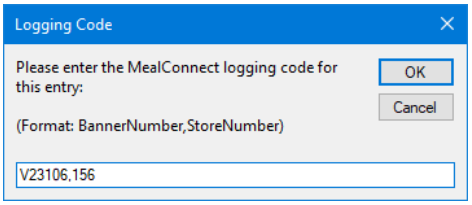
Click OK when done to close the editor.

4.3.6 Feeding America Partner Groups

If you select a group that has its Feeding America box checked, the group editor also shows the codes used to tie it into the Bulk Upload feature on the MealConnect website.

Description	MealConnectCode
KwikTrip Highway A	V-102773,123

When you add or edit an entry, it also prompts for those codes.

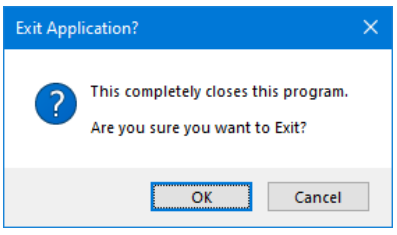


Be sure to get the proper BannerNumber and StoreNumber from the MealConnect website's downloaded template. Do not include any spaces in between the numbers, only use a comma. See Section 4.8.9 for details.

NOTE: if you precede any Logging Code entry with the word "ignore", that entry will not be included in the MealConnect reporting.

4.4 Exit Software

Another feature enabled while logged in as Admin is the Exit button at the top of the screen. If you press this, you will be prompted to confirm the desire to completely exit out of the software.



OK closes Access, Cancel returns you to the program.

4.5 View/Print Reports

Administrators also have access to Reports via the button that appears at the top of the screen.

Because there are multiple items to cover on this major topic, details are covered seperately in Section 5.

4.6 Edit Cart/Container Selections

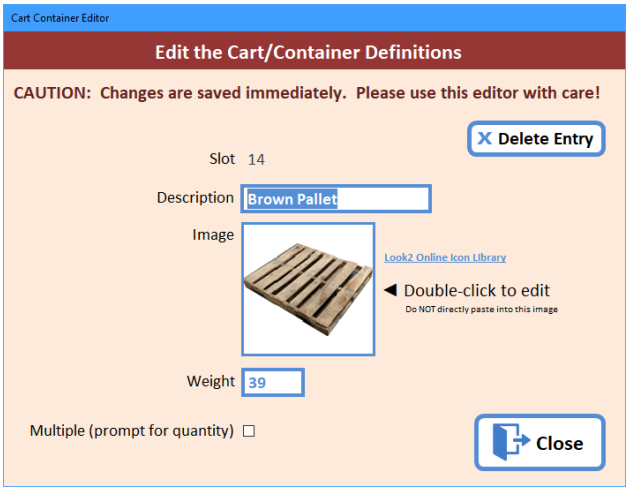
Administrators also have access to editing the definitions for the Carts/Containers. When logged in, click on the Pick Cart/Container button.

At the top right of the dialog window, a new Edit button appears for Administrator users. Clicking it will enable editing for all slots (the button turns green to show that editing is on).

Those carts/containers already having a definition (a non-blank description) will have a green outline, and those which are not yet defined will have a red outline, examples of which are shown below:

Clicking on a given slot brings up the Cart Container Editor for the selected entry.

4.6.1 Slot *(database field: ID)*



The slot shows the ID number *(1 thru 100, read-only*). This determines where the container appears in the selection window.

Entries shown above the selection window dividing line are recommended to have only the heavier containers (carts, dollies, fork lifts, pallets, etc.) of which there is typically only 1 being used per weighing session.

Items below the selection window dividing line and are recommended to be the smaller, lighter-weight containers of which there are typically 1 or more being used at a time.

Where the dividing line appears depends on the *Number of Cart Rows* parameter in the Settings screen.

Note: in the backend database, slot 101 is reserved for the Manual Override Entry and should not be edited *(keep its weight at -99lbs).*

4.6.2 Description *(database field: ContainerName)*

Each item uses a text description of the cart/container. Please keep the text length within the space provided (no wider than the entry field provided) so that it fits in the space provided in the user interface.

If this is left blank, that slot in the user interface window will be blank.

4.6.3 Weight

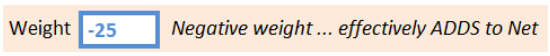
In the Weight entry field, enter how much a single item weighs (in lbs).

Large single-items should be rounded to the nearest whole lb.

Lighter multi-items should be rounded to the nearest 1/10th of a pound, since the software will multiple the number being used by this weight before rounding to the nearest pound. Having it more accurate will reduce any rounding errors.
*** **TIP:** weigh 10 of them and then divide by 10 to get a more accurate measurement of just one.

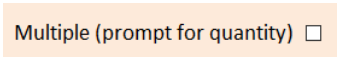
Suggestion: if you have multiple heavy carts all extremely close in weight, combine them into 1 entry. For example, if you have 10 shopping carts and 2 weigh 76lbs., 6 weigh 77lbs and 2 weigh 78lbs, just have one entry at 77lbs. It simplifies the selection process and works out the same on average.

You can enter a negative weight. A note appears indicating that amount gets added to the net weight. For example, use this when pre-weighed boxes are distributed (and thus don't get put on the scale at the time of recording weight going out).



4.6.4 Multiple

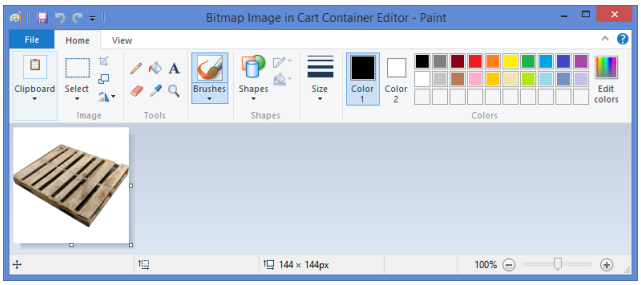
Uncheck this box if these are typically used one per weighing event (in general, this should be the items above the dividing line). Check this box if the user should be prompted as to how many are being used on the scale at one time (typically items below the dividing line).



4.6.5 Image

Each container has a bitmap image to aid in the selection process. Double-click the image from within the Editor to bring up that image in Paint.

IMPORTANT: do NOT paste an image directly into the Inventory Editor's control, as you may not be able to subsequently bring up the editor for that image.



From here you can edit the image, including using copy/paste and the resize tool. When done editing the image, simply close Paint and the updated image is saved in the database.

For a more detailed explanation on creating a good image, including searching the internet and then using the Windows Snipping Tool, please visit the support tutorials page on the web site (www.Look2Consulting.com) to see a video on this topic.

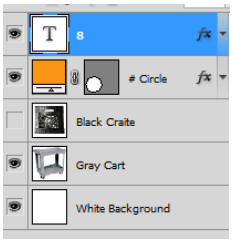
There are also dozens of images already formatted on the web site under the Support section ready for you to use; just visit:
www.look2consulting.com/iconlibrary.php
A link to this webpage is provided within the editor.

Image considerations:

- Size: 144 x 144 pixels *(can be larger, but would use unnecessary space, take longer to load, and may become distorted; smaller resolutions often appear pixelated).* Tips on getting them to this size are given in the next section.
- Use a simple background *(white preferred for clarity)*
- Search the internet for a nice clear/clean image
- If you cannot find one via a web search and must take an image yourself, make sure it's on a relatively uniform background (and at an angle looking down on the floor works well)
- To help identify carts, consider overlaying a numbered circle in the image, and then using matching stickers on those carts to help quickly identify them.

Image

Associated Sticker on Cart

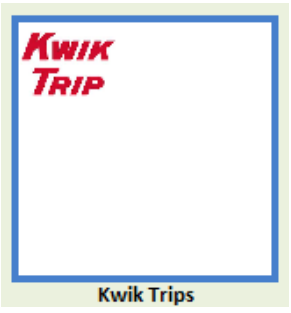


A Photoshop file can be downloaded which already has the layers defined for easy editing of the images, and an Illustrator file is available with the above sticker layout.

- Copy "thru" Paint *(i.e., if you use something like Photoshop, don't copy/paste direct from Photoshop as it results in storing a more complex object that takes significantly more time to load)*

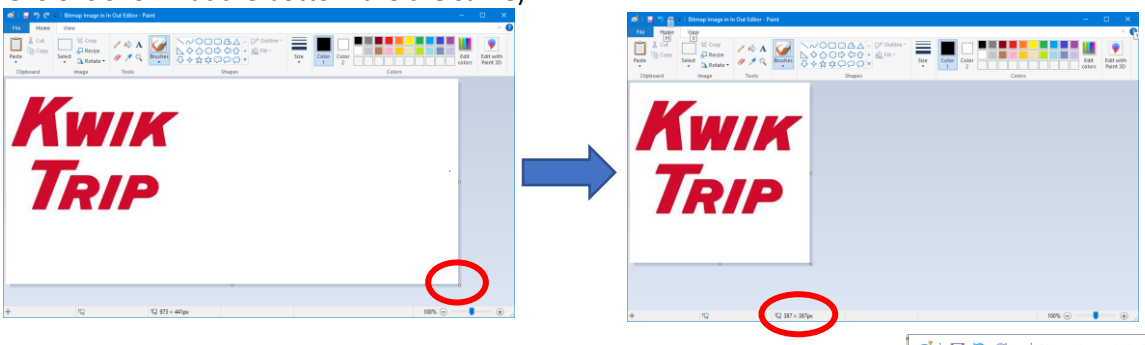
4.6.6 Resizing Your Images

Icons look best when sized to 144x144. The example shown to the right has an image that is too big (the software rescaled it, making the letters look pixelated) and not cropped correctly (logo not centered within square).

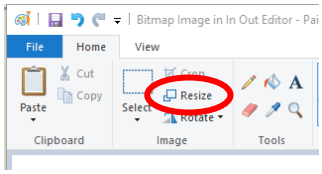


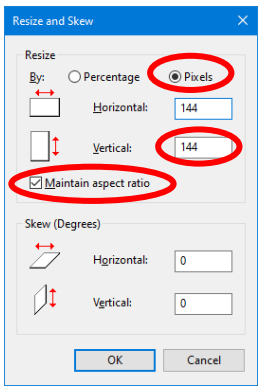
Kwik Trips

When editing the image, first resize the canvas so that it is square (drag the lower-right corner until the dimensions shown at the bottom are the same).



Click the Resize button *(note: if the editor window is small, only the icon may be visible, or it could be completely hidden … accessible via the image tool).*

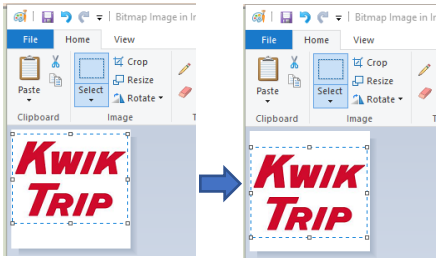




Make sure *Pixels* is selected, then type in 144 for whichever dimension is largest. With "Maintain aspect ratio" checked, the other dimension changes automatically.

Click OK to close the Resize dialog.

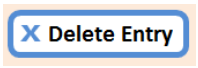
If you want to center your image, use the Select tool to rubber-band around the image, then move the selection as desired.

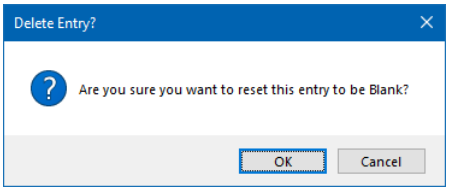


Close the Paint editor to save the image back to the database record.

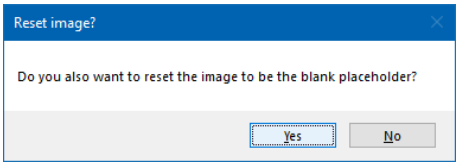
4.6.7 Delete Entry

Clicking on the Delete Entry button will bring up a warning dialog. Clicking the OK button will set the Weight and Description fields to be blank.





It then prompts you if you also want to reset the image. Clicking Yes will put in the Image Placeholder; clicking No will keep the image intact (in case you want to re-use it at a future date).



The editor then closes and the entry will no longer be shown (since the Description is blank).

4.7 Move Cart/Container Selections

Administrators also have the ability to move the positions of the icons for the Carts/Containers. When logged in, click on the Step 2 Pick Cart/Container button.

At the top right of the dialog window, a new Move button appears for Administrator users. Clicking it will enable moving for all slots (the button turns green to show that Moving is on).

Click on an entry in the window. Arrow buttons appear for that selected entry.

Clicking an arrow button moves the selection in that direction. Left/Right arrows effectively "swap" the selected container with the one next to it. Up/Down arrows move the entry to the previous/next row, and the entries in between get shifted to make room.

To move a different cart/container, simply click another entry and the arrows will be placed around that new selection. When done moving entries, click the Moving button to turn off this editing feature.

4.8 Edit IN/OUT Selections

Administrators also have access to editing definitions for the IN Sources and OUT Destinations. When logged in, click on the Step 3 Image selection on the main page to bring up the WhatWhere selection dialog.

At the top of the dialog window, a new Edit button appears for Administrator users.

Clicking it will enable editing for all slots, and the button changes to indicate that edit mode is now active. NOTE: editing mode remains on until you press this button again to turn it off.

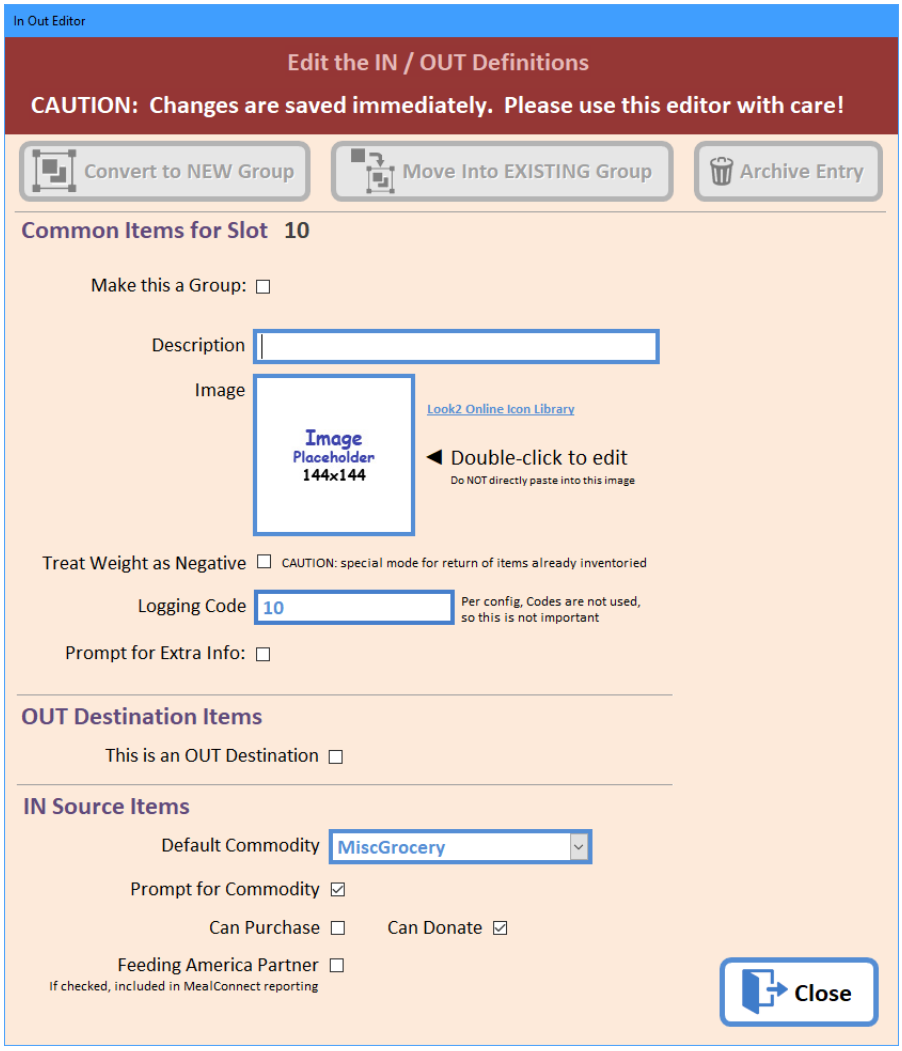
When editing is turned on, those entries already having a definition (a non-blank description) will have a green outline, and those which are not yet defined will have a red outline, examples of which shown below:

Clicking on a given slot (either green-existing or red- new) brings up the In Out Editor.

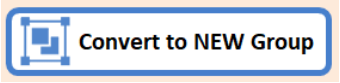
From here you can edit the options for the selected entry.

As noted in the editor, please use with caution, as **<u>all changes are saved immediately to the database</u>**.

Each of the items in this editor are now d escribed.

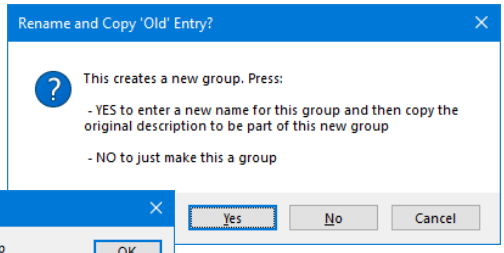


4.8.1 Convert to NEW Group

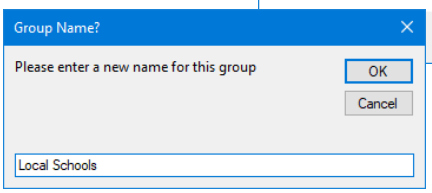


If editing an existing individual entry, the Convert to NEW Group button is enabled. *(If you are either creating a brand-new entry or are editing an existing group, this button is disabled.)*

Pressing it brings up a dialog.



Press the **Yes** button to create a new group and copy the existing description into that group as its first member. You will then have to enter a new name for the group.



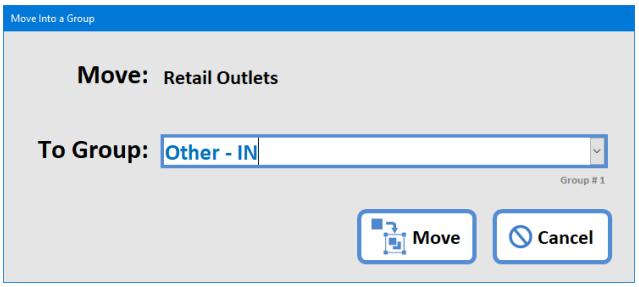
Press the **No** button to just create a new group using the existing description. Note: this is only recommended if there are no logged entries with that description.

You may also press **Cancel** to return to the editor without creating a group.

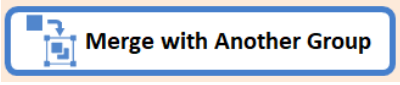
4.8.2 Move/Merge into EXISTING Group

If editing an existing individual entry, the Move into EXISTING Group button is enabled. *(If you are either creating a brand-new entry, this button is disabled.)*

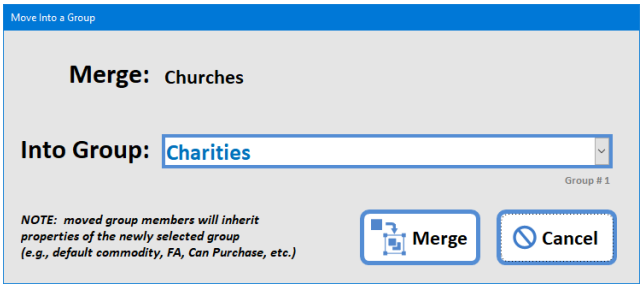
Pressing it brings up a window allowing a selection of which group to move the selected entry into. Simply pick the desired existing group and click the Move button.



If editing a slot that represents an existing group already, the button label changes to Merge with Another Group.

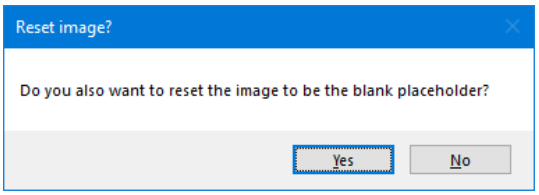


It performs the same move function as for an individual item, but instead of only moving a single item, it moves each of the members of the group into the selected group. Note that the overarching settings for the group are lost, and instead the moved members inherit the settings for the group they get moved into (e.g., the Default Commodity, Can Purchase/Donate, etc.).

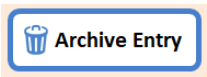


You may also press **Cancel** to return to the editor without initiating the move process.

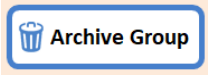
If you do successfully move an entry, the software asks if you also want to reset the image used for that slot. Press Yes to change it back to the image placeholder, or No to keep the icon for some future use.



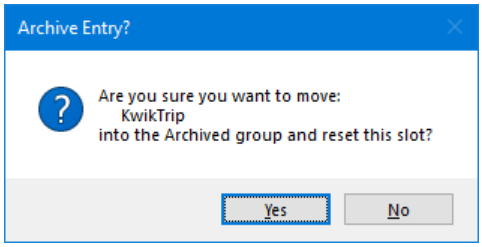
4.8.3 Archive Entry/Group



If editing an existing entry, the Archive Entry button is enabled.
(If you are either creating a brand-new entry, this button is disabled.)



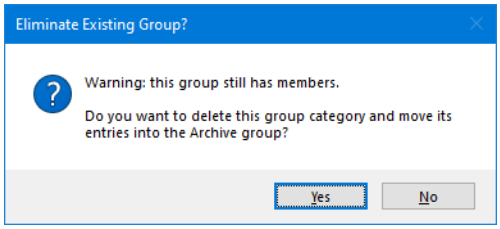
Pressing it brings up a dialog asking if the entry should be archived and the slot reset. Note that Pressing Yes does not "delete" the entry entirely from the system; it simply moves it to the " Ω Archived" group. *(FYI: the Omega symbol is used so that it appears at the end of the Edit group list).* This is handy if, for example, an organization no longer donates, but you still want their past donations to be part of your grouped reports (they will then be included in the Archived group).



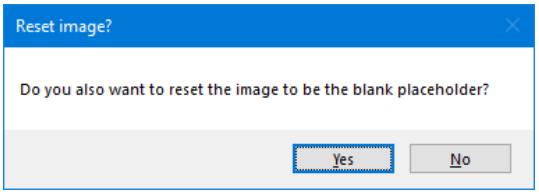
Note: to fully delete it, you would need to edit that archive group and delete the entry from its list.

You can press No to return to the editor without archiving the entry.

If editing a slot for an existing group, the button label changes to “Archive Group”. If the group has members, the dialog lets you know that it will archive all of its members into the “Ω Archived” group.



If you do successfully archive an entry, the software asks if you also want to reset the image used for that slot. Press Yes to change it back to the image placeholder, or No to keep the icon for some future use.



4.8.4 Slot (database field: ID)

Common Items for Slot 15

The slot shows the ID number (1 thru 199) for the entry being edited. It is read-only *(since this must not change as the number determines where the entry appears in the selection window).*

Slots 1 to 99 are shown above the selection window’s dividing line and are typically for the IN Sources.

Slots 100-199 are below the selection window’s dividing line and are typically for the OUT Destinations.

NOTE: in the backend database table, item 100 is reserved for system use *(the group for Archived entries)* and is not accessible to the editor. Item 200 is also reserved for system use *(a temporary slot used while moving entries).*

4.8.5 Groups

The first common item in the editor is the “Group” status.

If editing an existing group, it tells you the group number: This is an existing group (#7)

If editing an existing individual item, it lets you know it’s not a group: *(This is not a group)*

If creating a new entry in an empty slot, it has a checkbox for making the slot represent a new group. Make this a Group: ☐

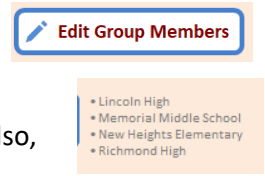
Leave the “Make this a Group” box unchecked if the entry is not part of any group (i.e., it is a single Source/Destination logo). *(This makes the underlying database Group field blank)*

Check this box if the entry is the “main name” for a group. Checking will automatically assign the next available group number for you (positive numbers for IN Sources, and negative numbers for OUT Destinations). In the example shown, the selected entry is for IN Source Group 8. Please leave these Group #’s alone, as it affects the entries in the Group Members table. Make this a Group: ☑ Group # 8

IMPORTANT: **Group 1 is RESERVED** for “Other - IN”. Please keep the Group for that entry as-is, (the group designation checkbox, the group #, and the description). It can be move to other slots (i.e.,

instead of slot position 33, it could go into slot 44, etc.), but it must remain one of the choices. Also, **Group 0 is RESERVED** for the "Ω Archived" group.

If an entry is defined as a group, the Edit Group Members button is enabled. Clicking it brings up the Group Editor, details of which are described in Section 4.3. Once you add at least one member, the "Make this a Group" checkbox becomes hidden, with the editor treating this as an existing entry (rather than a new one). Also, group member names are shown in the editor in a read-only list for easy reference.



4.8.6 Description

This is what gets logged to the history database records to describe the source/destination (unless Logging Codes are used). Please keep this concise, making it less than the width taken by the words:

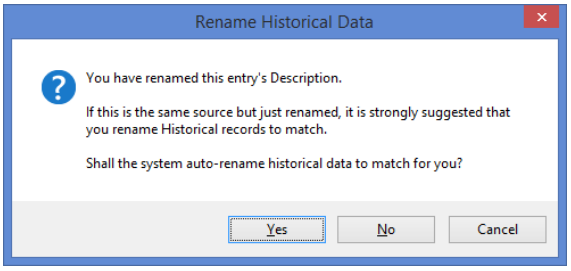
"Keep shorter than this width"

Because SQL Queries and Excel Macros will be used to extract the data, to minimize issues with such automation it is recommended you stay away from using special characters such as:

" ' \ % $ # , ? { } [ ] ( ) ~ ; ! | * >

BLANK: if the Description field is blank, that entry will not appear in the selection window.

NAME CHANGE: if you change an EXISTING entry's description, a dialog appears asking if you want to automatically rename historical data to match the new name. Click YES if just renaming an entry.



4.8.7 Image

The image for that slot is shown. Double-click to bring up Paint as the image editor.

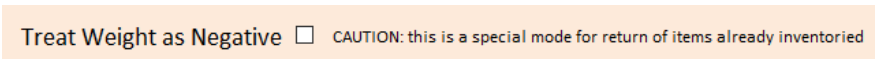
IMPORTANT: do NOT paste an image directly into the Inventory Editor's box, as you may not be able to then bring up the image editor.

For details on image specifications, see Section 4.6.5. For help editing it to fit nicely into the square provided, see Section 4.6.6.

4.8.8 Treat Weight as Negative

Check this box if you wish to treat the weigh values as negative (and hence will be subtracted from the totals in the reports). This is only used for "special case" entries. One example is for inventory that has already been weighed and recorded that goes out to a "free area" and then at the end of the day comes back into a food pantry. Such weight should not be counted twice (would over-inflate the amount going in/out of the pantry), and so one entry can be positive weight for going out, but a negative weight for coming back in (sort of like undoing the out).

In general, leave it unchecked for "normal" weight operations.



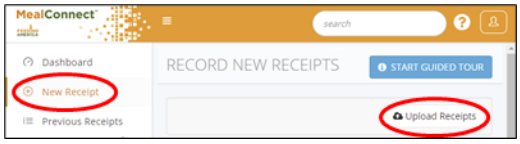
4.8.9 Logging Code (also MealConnect)

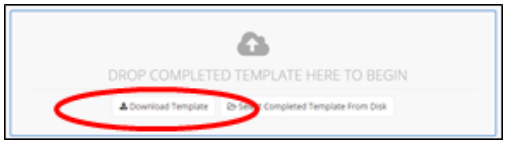
There are two primary uses for the Logging Code field.

One is for use in the bulk receipt upload feature on the MealConnect website. If the Feeding America Parnter box is checked for an IN entry, the software also makes sure that a Banner Number and Store Number are entered in the Logging Code *(it looks for a comma ",")*.

You can get these numbers via the downloaded template from the MealConnect website for your account. Just click the Upload Receipts button in the New Receipt section, then click Download Template.

	A	B	C
1	Banner Number	Donor Name	Store Number
2	52033	HyVee	1392
3	V-102773	Kwik Trip	456

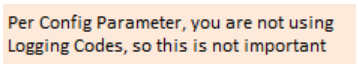




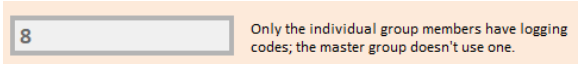
For example, the logging code for the specific KwikTrip store shown would be entered as: ***V-102773,456***

NOTE: type "ignore" as the start of a logging code, and the MealConnect report will not include that source in the bulk-receipt upload report.

The other use of logging codes is if you are using special codes to track inventory to another ERP system. By turning on the tblParameters field 16 "Log IN/OUT Codes", the software will prepend the logging code before the description. If you are not using that option and the entry is not a Feeding America partner, the editor notes that with a comment. However, this field should still be set with a unique number (easy to just have it match the ID field).

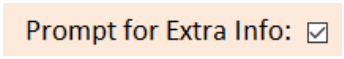


If the entry is designated as a Group, then this field is disabled since a group icon itself doesn't require a logging code (only the individual members have logging codes).



4.8.10 Prompt for Extra Info

Some organizations wish to associate an ID with certain weight recordings. For example, a Household ID for food going out to clients, or perhaps a Truck Driver ID for a delivery person bringing in a load of food. Others want to attach a note to certain records (e.g., extra details on produce type). There's an option for this which can be turned on per Source/Destination.

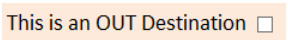


If this is checked, and "Uses Extra Info" is set to True in the Settings (ID 12), then the software prompts for the additional information to be associated with each record as it's being weighed and saved.

Leave this Unchecked if your organization does not want to include extra information with each logged record for this Source/Destination.

4.8.11 Out Destination Checkbox

Check this box if this is an OUT Destination. 

Leave it unchecked if this is an IN Source. 

Various other parameters in the editor will appear or be hidden depending upon the status of this box.

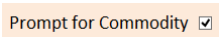
In general, slots 1 through 99 should all be the IN, and so this should be unchecked. Similarly, slots 101-199 should all be in the OUT Destinations and so should be checked.

An exception to this is if you are treating an "OUT Destination" as a negative and want it to appear in the top "IN" list. An example of this is shown in the table later in this document, where "Food out to hall +" is marked as an OUT, but "Food in from hall -" is ALSO marked as an OUT yet appears in the IN source section (since it's in the top 44 entries). This is because this food pantry takes food out into a hallway for anyone to take (without having to go through the pantry) but at the end of the day brings it back in. Since this inventory was already counted as coming into the building, they did not want to inflate the IN numbers. So, they treat it as an OUT, but count the pounds weighed as negative (via the Negative checkbox described in Section 0) so they are subtracted from the OUT totals.

4.8.12 Default Commodity

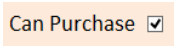
This is usually only shown for IN Source entries (the exception is if the Out Logs Commodity option is set to True). Specify which commodity should be selected as the default. For example, Gardens are set to have "Produce", while Little Caesar's has "Prepared Food". This makes it easier for operators using the software (fewer clicks).

4.8.13 Prompt for Commodity

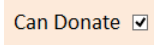
This is only shown for IN Source entries. Normally, this will be checked. 

However, some IN Sources only have one commodity type (e.g., Gardens only offer Produce, or a restaurant only donates Prepared Foods). By unchecking this, the software will not prompt the user for the Commodity via the pop-up dialog if not a group (though the selection will still be available on the main screen ... this setting simply eliminates the need for another click).

4.8.14 Can Purchase

This is only shown for IN Source entries. Check this box if you can purchase from this IN Source. Uncheck it and this choice does not even appear to the user. 

4.8.15 Can Donate



This is only shown for IN Source entries. Check this box if the IN Source ever donates items to your organization. Uncheck it and this choice does not even appear to the user.

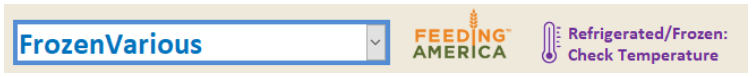
4.8.16 Can Glean (optional)

This checkbox is only shown for IN Source entries when the "Allow Gleaned as How Category" option is set to True in the System Settings. Check this box if you can glean from this IN Source. Uncheck it and this choice does not even appear to the user.

4.8.17 Feeding America Partner

This is only shown for IN Source entries. This should be checked if the IN Source is part of the Feeding America program, with its receipts to be reported to the MealConnect system. Checking this will:

- include data from this source in the Feeding America reports and MealConnect template
- show a Feeding America logo and a reminder message on the selection screen stating:
  "Please weigh each commodity separately!"
- show a reminder to check temperature of donated commodities that are Frozen or Refrigerated *(i.e., Codes ending in -3 or -4 having Track Temperature = True)*



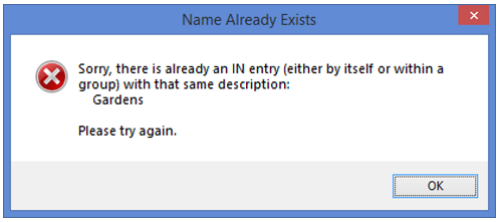
If checked, be sure the Logging Code for the entry matches the numbers given in the MealConnect downloaded template, using the format: *BannerNumber,StoreNumber.* See Section 4.8.9 for details.

4.8.18 Close Button

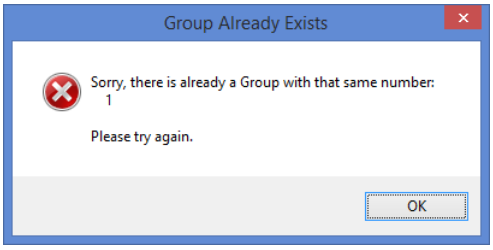
Fields are saved "live" ... as soon as you leave a particular field/control, that value is automatically saved to the selected entry's data record.

Clicking close dismisses the IN/OUT Editor, and also does some final checks prior to closing the window.

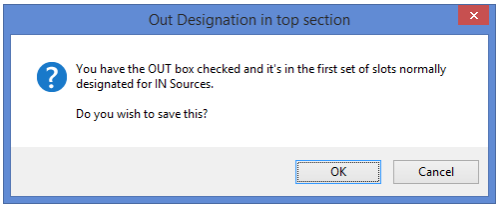
- **Duplicate Names:** if you have entered a name in the Description field that is in use somewhere else (either one of the primary slots or in one of the sub-groups), you are presented a warning and asked to try again. To correct this, enter a unique description. Note: for IN's it only checks other IN names. Same for OUTs.



- **Valid Groups:** the software checks to make sure any group ID is not duplicated. This normally should not happen, as groups are automatically generated and you should not override them.

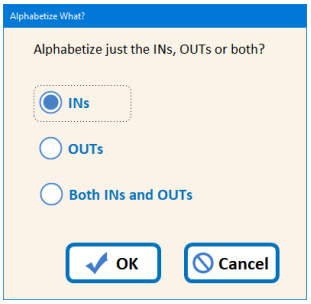


- Warns (but allows it to happen) if you have an OUT defined in the first 99 slots (normally reserved for IN entries), or if you have an IN defined in slots 101-199 (normally reserved for OUT entries).



4.9 Alphabetize IN / OUT Icons

Administrators also have access to being able to rearrange the Icons in alphabetical order. When logged in, click on the Step 3 Image selection on the main page to bring up the IN/OUT selection screen.



Click the A-Z button to bring up the Alphabize choices dialog.

Here you can choose whether to alphabetize just the INs, just the OUTs, or both INs and OUTs.

Choose OK to proceed, or Cancel to leave the icon order as-is.

4.10 Move IN/OUT Selections

Administrators also have the ability to move the positions of the IN/OUT icons. When logged in, click on the Step 3 Image selection on the main page to bring up the WhatWhere selection dialog.

At the top right of the dialog window, a new Move button appears for Administrator users. Clicking it will enable moving for all slots (the button turns green to show that Moving is on).

Click on an entry in the window. Arrow buttons appear for that selected entry. (There are separate move arrows for the IN section and for the OUT section.)

Clicking an arrow button moves the selection in that direction. Left/Right arrows effectively "swap" the selected icon with the one next to it. Up/Down arrows move the entry to the previous/next row, and the entries in between get shifted to make room.

To move a different IN Source or Out Destination, simply click another entry and the arrows will be placed around that new selection.

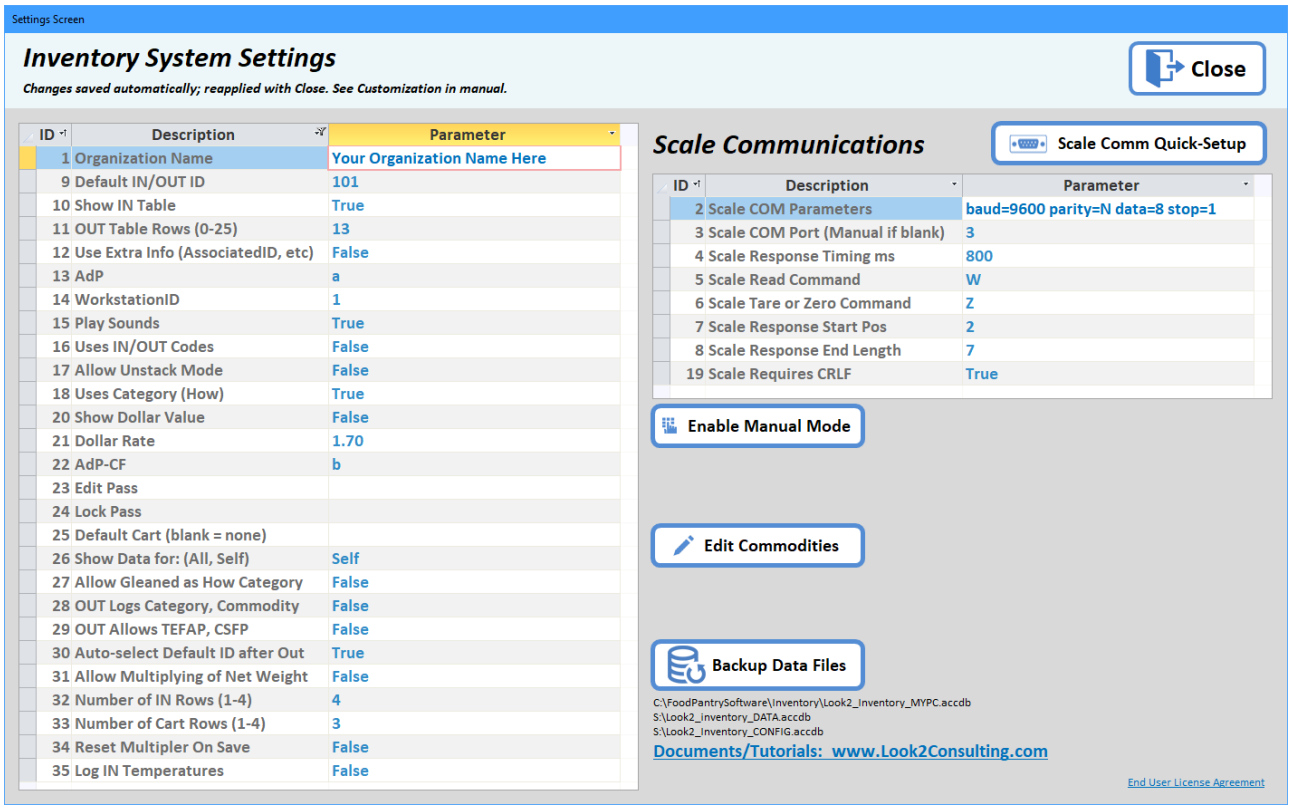
When done moving entries, click the Moving button to turn off this editing feature.

Note: if the "Default" item is moved, that parameter is automatically updated in Settings.

4.11 System Configuration Settings

A System Configuration button (the gear) appears at the top of the main window.

Clicking this button brings up the Inventory System Settings screen.



4.11.1 Edit Parameters

The table on the left is a convenient view of the tblParameters table in the MyPC database file, as further described in Section 6.6. The table on the right shows the parameters associated with communications to an external scale.

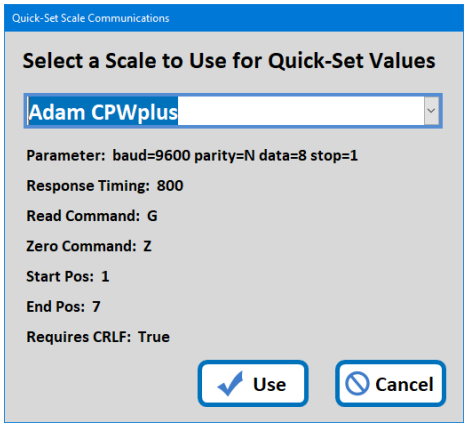
You can make changes by typing directly in the Parameter column. Changes are saved automatically.

At the bottom of the screen it shows the paths to backend database files (CONFIG, DATA, MYPC), as well as providing a link to take you to a website with documenation and tutorials on the software.

There is also a link to the End User License Agreement PDF.

Click the Close button when you are done editting the system settings.

4.11.2 Scale Comm Quick-Setup



Clicking on the Scale Comm Quick-Setup button brings a dialog showing a list of known scale protocols. Selecting an entry shows the various scale communication parameters associated with that brand of scale.

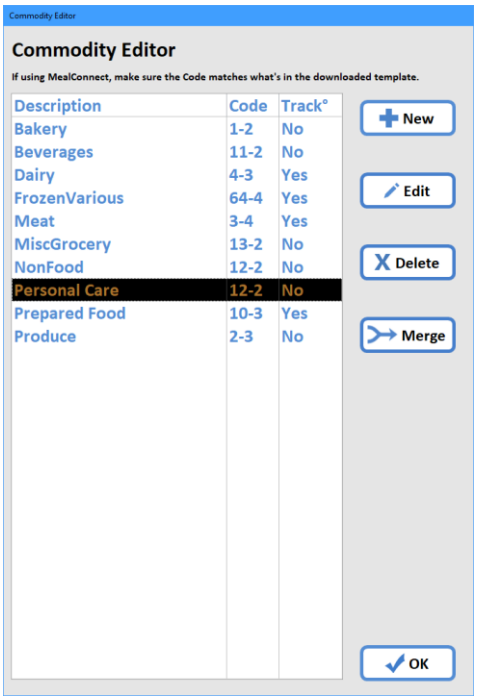
Either press the Use button to transfer those settings to the parameters table, or press Cancel to leave the settings as-is.

If you don't see your scale in the list, you can select one that's close and then manually change entries on the settings screen.

4.11.3 Enable Manual Mode

Clicking on the Enable Manual Mode button clears the value for the Scale COM Port (parameter ID 3). It simply provides a more straight-forward way of configuring a system that doesn't use a scale. See section 2.1.6 for details.

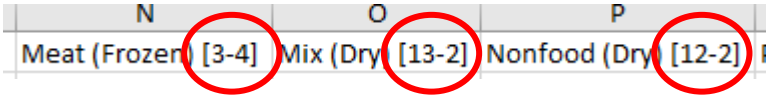
4.11.4 Edit Commodities



Clicking the Edit Commodities button brings up the editor for changing the master list of names used for categorizing recorded entries.

In addition to the Description, there's also a column showing the associated Code for each entry, and whether the temperature should be tracked (for FA partner donations).

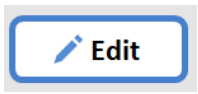
If using the bulk upload feature in MealConnect to report receipts for Feeding America Partners, be sure these codes match the ones used in the downloaded template from the MealConnect website (these can vary by Food Bank region). As shown in the example below, the commodity codes are enclosed in square brackets [].



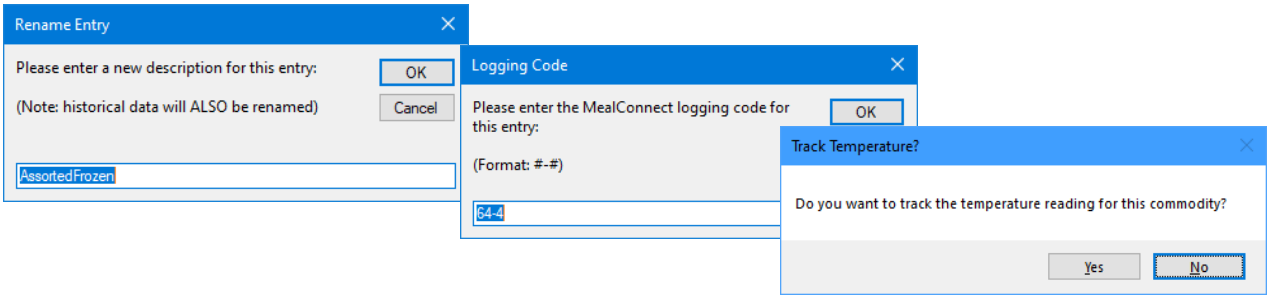
Note: You can map more than one commodity to a single code used by MealConnect. This is helpful if clarity is needed for donations from various sources. For example, both "NonFood" and "Personal Care" are mapped to code 12-2 for that region's Food Bank. When uploading records to MealConnect, both get properly imported.

If you are not reporting to MealConnect, or importing records into an ERP system or other such software, these codes are not important.

Note: Description used by the software does NOT have to match that of the MealConnect template; only the codes must match. For example, instead of "Mix" (which is in the template), the example shows the name used by the software as "MiscGrocery". The "13-2" is what maps the entry.

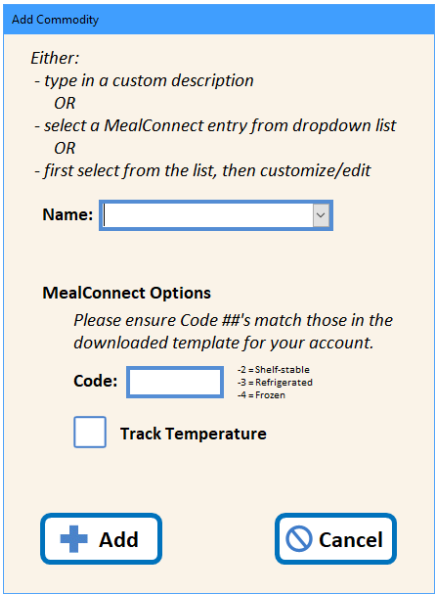


If you select an entry in the list and click the Edit button, changing the name of an existing entry will update all historical data to match the new name. For example, if you rename "Beverages" to "Drinks", existing data that was logged as Beverages will be changed to Drinks. You will also be prompted to change the Code (if so desired), and whether it will track the temperature for FA partner donations.



Within the Commodity Editor, you can select an entry in the list and then press the Delete button. Historical data is not affected, but entries going forward will no longer have that commodity as a choice.

Click the + New button to bring up the Add Commodity dialog for creating a new entry.



You can either type in your own custom description, or choose one of the entries in the dropdown list (abbreviated descriptions of the 31 the MealConnect categories).

The software checks that the entered name is not yet in use.

NOTE: after you select an entry from the list, you can then choose to further modify it if so desired. For example, you might select "Cleaning Items" from the list (so it also enters the proper Code for you), but then change its name to "Cleaning Products" to match what your local Food Bank prefers to call that commodity.

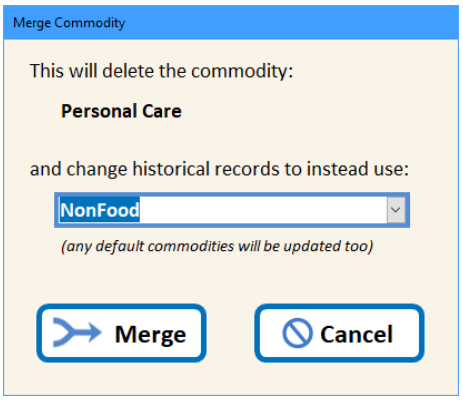
Selection from the list will populate a default Code for you. If it has a number symbols (##) in it, please replace with the proper number from your downloaded template from the MealConnect website (as described above). Also, some selections may have the first number defined, but the 2nd number should be verified (depends upon whether your Food Bank is tracking for Refrigerated or Frozen). For example, your Meat may not be Frozen (code 3-4), but rather simply be Refrigerated (code 3-3).

If you want to prompt users for a temperature when saving a weight, check the Track Temperature box.

When done entering the Name, Code, and Track Temperature setting, click the Add button to finish creating the new Commodity.

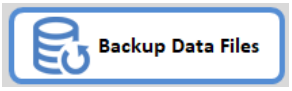
Press Cancel to return to the Commodity Editor screen without saving any new entry.

Within the Commodity Editor, you can select an entry in the list and then press the Merge button. A dialog appears in which you can then select with which other category to merge into. The originally selected commodity gets deleted from the selection lists, and all historical data that was recorded as being that old commodity gets updated to instead use the merged commodity.



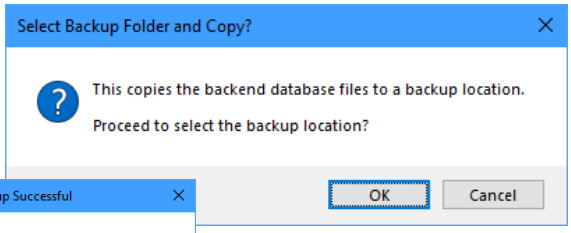
4.11.5 Backup Data Files

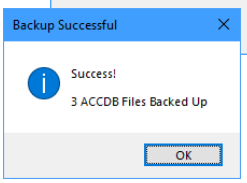
At the bottom of the Configuration Settings screen, the paths to the CONFIG, DATA, and MyPC backend database files are shown. You can click the Backup Data Files button to make a copy of the 3 ACCDB files.



After pressing OK to confirm you want to proceed with backup, select the drive/folder where the files should be stored. It may take a few seconds to then make the backup copies, so please wait.

The copy-date is appended to the name.





4.12 Admin Logout

The Admin Login button changes to “Admin Logout” and the text turns red to serve as a reminder that these additional edit functions are currently enabled/active and that you should re-secure the system when done using these administrative features.

So, remember to click on the Admin Logout button to re-secure the system and turn off the editing and extended access.

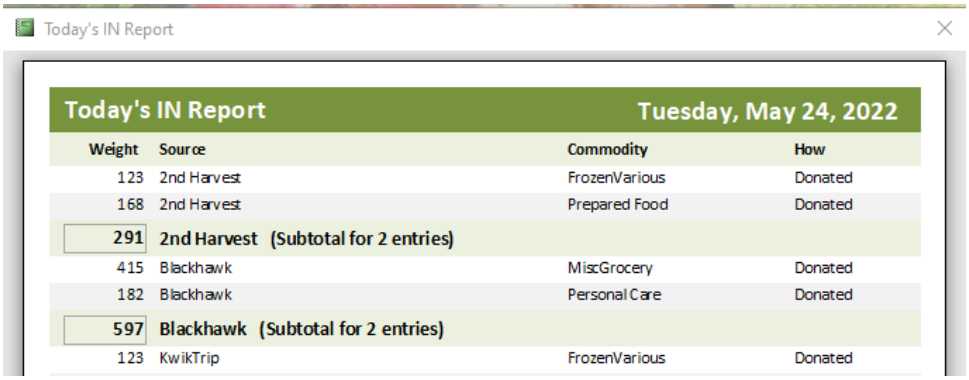
5 Reports

There are different types of reports provided by the software: some on the main screen, some in a Reports screen, and still others via external Excel templates provided for more comprehensive reporting. Each of these are now explained.

5.1 Today's IN/OUT Reports

At the top of the IN and OUT tables on the main screen there are small printer icons.

Clicking on them brings up a summary of that day's IN/OUT transactions. *(If there are multiple scales/workstations in your organization, this can be configured to show only the current workstation's data, or all of them. This is done via the System Configuration parameters.)*



Today's IN Report — Tuesday, May 24, 2022

Weight	Source	Commodity	How
123	2nd Harvest	FrozenVarious	Donated
168	2nd Harvest	Prepared Food	Donated
291	**2nd Harvest (Subtotal for 2 entries)**		
415	Blackhawk	MiscGrocery	Donated
182	Blackhawk	Personal Care	Donated
597	**Blackhawk (Subtotal for 2 entries)**		
123	KwikTrip	FrozenVarious	Donated

From here you can directly print it out using either the CTRL-P keyboard shortcut, or by right-clicking on the report and choosing Print from the pop-up menu.

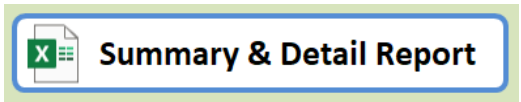
The right-click menu also allows the report to be exported to a PDF, Excel file, text file, and various other options.

5.2 Excel Summary and Details Report

In addition to the reports built into the Access system, an Excel file is supplied which gathers data from the database, thus allowing custom report creation. By default, this file is located in the same directory as the rest of the Inventory software.

SummaryReport_WithRaw_Template.xlsm

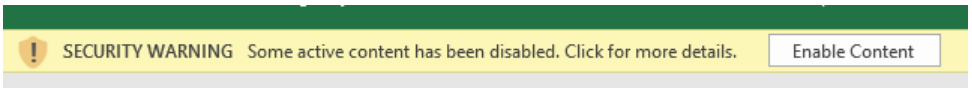
To access this report, either launch it directly from the Windows File Explorer (suggestion: add a desktop shortcut icon) or from the Excel Summary & Detail Report button provided in the Reports screen.



NOTE to OFFICE 365 Users: you must use the desktop version of Excel in order for the macros to work properly.

5.2.1 Initial Use: Excel Security Warning

The first time you launch the file, if Excel hasn't be fully configured yet it may present a Security Warning. This is Microsoft Excel telling you the file contains a Macro (which is used to get the data from the Access database for the report).

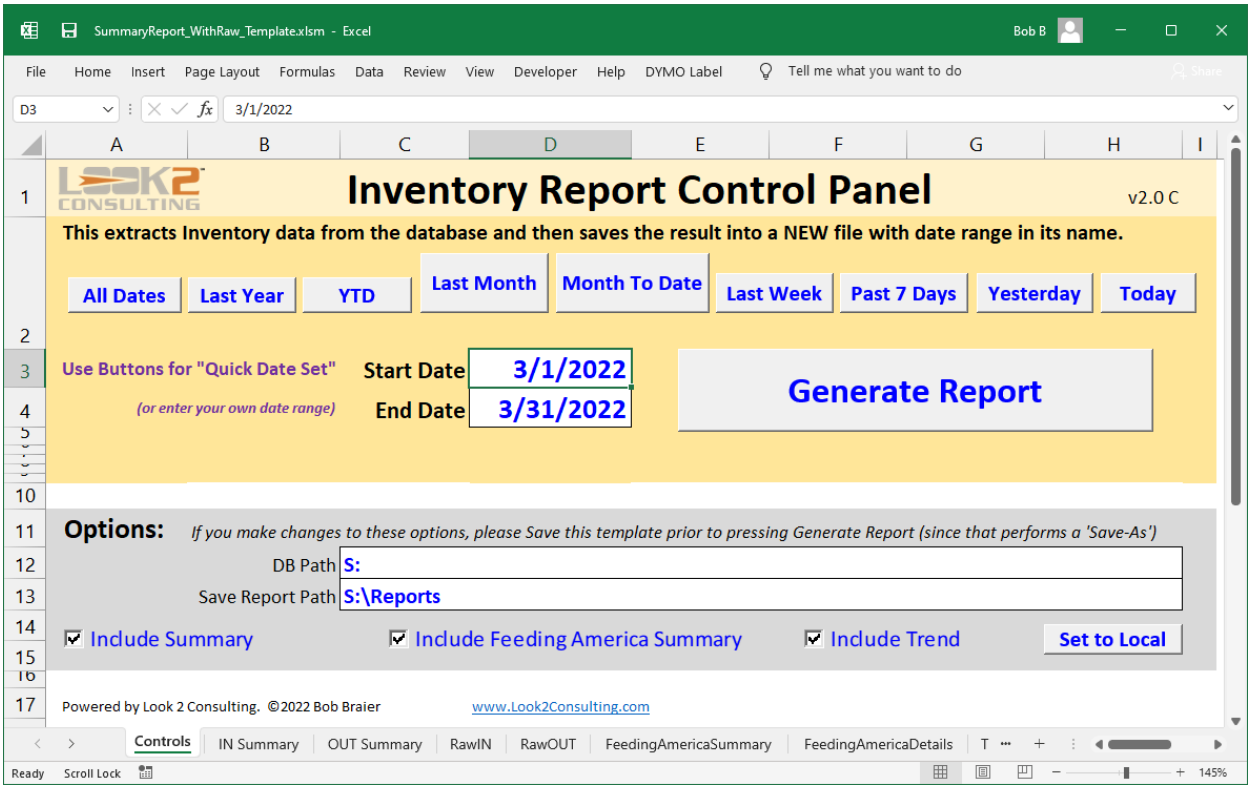


Simply click the Enable Content button located at the top of the window, and then Save the file. It should not warn you again.

NOTE: you can also set the Inventory directory as a trusted location in the Microsoft Excel Trust Center.

5.2.2 Report Controls

The first worksheet in the Excel file contains the controls for generating the report.

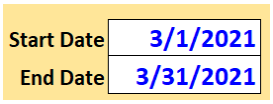


This Excel file uses macros to extract the data from the Access database(s) and stores the results into a separate report file in the \Reports subdirectory (this way the "master template" does not get overwritten). Each report generated gets a filename with the date range used for that report (e.g., *Summary_Report_01-01-21_thru_01-31-21.xlsx*).

The Data is extracted from the database found in the path specified in the Options section of the main Controls sheet. By default this should be the mapped "S:" drive, but could be something different depending upon your location's configuration. You can press the Set to Local button to automatically configure these options to point to the local directory in which the file is located. In general, once this is set and saved, the master template file should not be altered.

IMPORTANT for OFFICE 365 USERS - you MUST set the "Auto-Save" option to "OFF", otherwise this template could become compromised.

The Excel report file works with a Start/End Date range and provides the Quick Set buttons to make the entry easier (Last Month and Month To Date are a little larger, as they are the ones most often used).

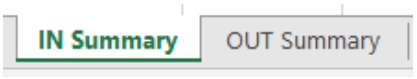


Once the date range desired has been entered, press the Generate Report button to initiate the macro which in turn extracts the data from Access and puts it into the Excel report.

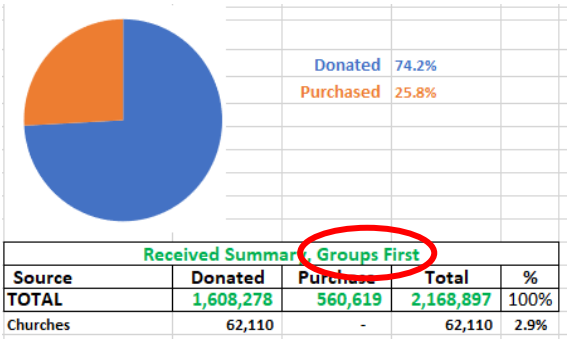
The macro automatically closes the template, saving the report with the date range in the new filename.

5.2.3 Summary Sheets

If the Include Summary box was checked prior to the report being generated, there are two worksheets providing summaries of the IN Sources and OUT Destinations.



They each include two different tables: the one on the right shows any groups consolidated such that only the overall group name is shown, with the groups listed first in the table; the one on the left shows the group members individually. For example, one table will simply list "Churches" and show the total weight of all donations from all churches, consolidated in that one line. The other table will list each church's total individually.

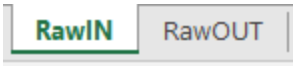


Received Summary				
Source	Donated	Purchase	Total	%
TOTAL	1,608,278	560,619	2,168,897	100%
Blackhawk	13,253	-	13,253	0.6%
Christ Memorial LCMS	162	-	162	0.0%
Good Shepherd	1,427	-	1,427	0.1%
St. Christopher	6,718	-	6,718	0.3%
St. Ignatious	1,296	-	1,296	0.1%
St. Isadore	1,514	-	1,514	0.1%
St. James	10,271	-	10,271	0.5%

Received Summary Groups First				
Source	Donated	Purchase	Total	%
TOTAL	1,608,278	560,619	2,168,897	100%
Churches	62,110	-	62,110	2.9%

5.2.4 Raw Data Sheets

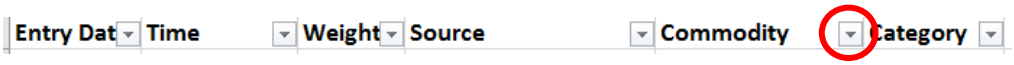
The Excel macro also extract all records within the time frame specified and puts those records into the RawIN and RawOUT worksheets. This is the "raw data" stored by the Inventory System.



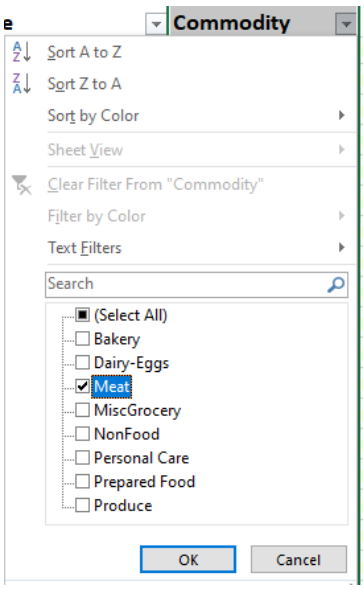
The raw tables come with filtering turned on. This allows you to perform your own reporting/filtering/sorting as you see fit.

While this document does not go into details on Excel training, here's one tip to get you started:

- Click one of the small arrows to the right of each column header.

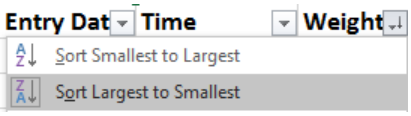


You can then selectively show data that matches any criteria you desire by selecting data criteria from each dropdown.



For example, if you only want to see the entries for Meat items, you can click the arrow next to Commodity and then check only the Meat box. Excel will then show only those rows containing that data and hides the rest (those other entries are not deleted, just hidden).

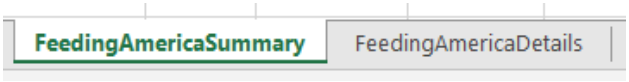
If you then want to further sort that filtered data by the size of the donation, you can choose Sort Largest to Smallest from the dropdown control in the Weight column.



There so many options once the data is in Excel (creating pie charts and bar graphs, reports for donors by quarter, etc.) that there is not enough time to cover it all within this overview document. Please seek out other training materials to learn more about the power of Excel and the features it offers.

5.2.5 Feeding America Sheets

If the Include Feeding America Summary box was checked prior to the report being generated, there are two additional worksheets provided for this data.

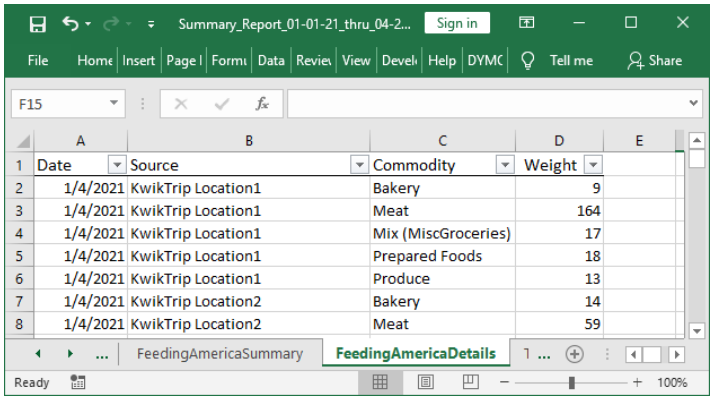


NOTE: there is also a separate Excel file (*FeedingAmerica_MealConnect_Template.xlsm*) offering the ability to bulk-upload receipts to the Feeding America MealConnect website. Details are covered in Section 5.3.

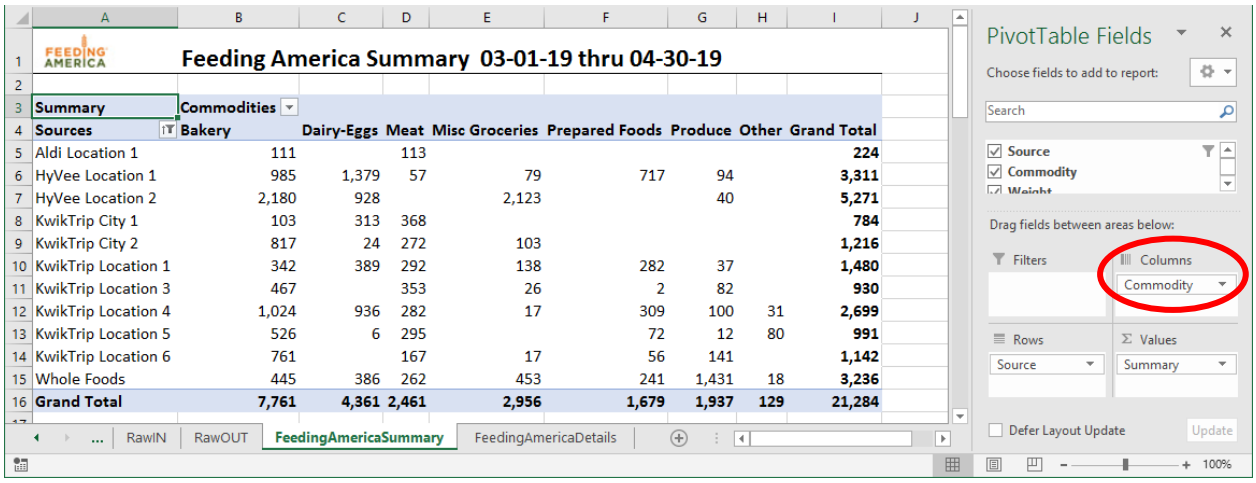
The FeedingAmericaDetails worksheet shows all of the donated records within the selected timeframe for sources designated as Feeding America partners.

The table includes the Date of the donation, the Source, the Commodity and the Weight.

As with the RawIN/RawOUT worksheets, these columns are preconfigured with Filtering turned on.



The FeedingAmericaSummary worksheet has a Pivot table linked to the Details data.



Feeding America Summary 03-01-19 thru 04-30-19

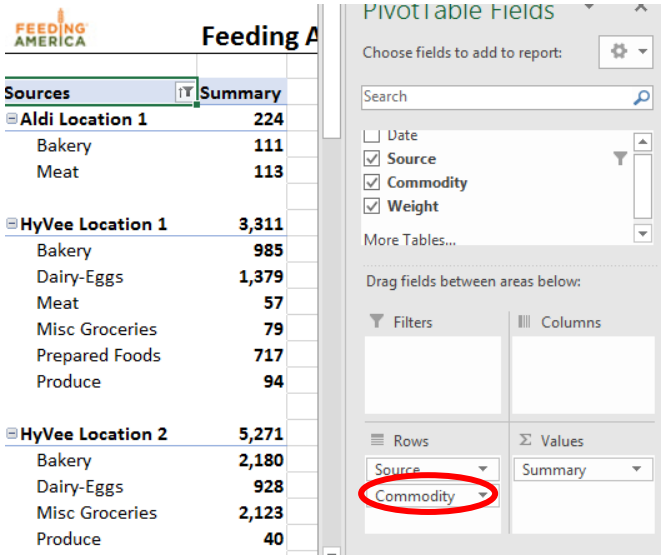
Summary	Commodities							
Sources	Bakery	Dairy-Eggs	Meat	Misc Groceries	Prepared Foods	Produce	Other	Grand Total
Aldi Location 1	111		113					224
HyVee Location 1	985	1,379	57	79	717	94		3,311
HyVee Location 2	2,180	928		2,123		40		5,271
KwikTrip City 1	103	313	368					784
KwikTrip City 2	817	24	272	103				1,216
KwikTrip Location 1	342	389	292	138	282	37		1,480
KwikTrip Location 3	467		353	26	2	82		930
KwikTrip Location 4	1,024	936	282	17	309	100	31	2,699
KwikTrip Location 5	526	6	295		72	12	80	991
KwikTrip Location 6	761		167	17	56	141		1,142
Whole Foods	445	386	262	453	241	1,431	18	3,236
Grand Total	7,761	4,361	2,461	2,956	1,679	1,937	129	21,284

It shows tallies for each Source by Commodity in a table that also includes the grand total weight for the selected timeframe, along with a breakdown by date within that timeframe. These can be further collapsed, expanded, sorted, and more.

By manipulating the Rows/Columns and other PivotTable settings, you can have this information summarized and filtered as desired.

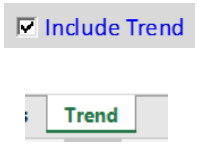
For example, remove “Date” from Rows to get summary of receipt totals for the date range selected. Drag “Commodity” from Columns to Rows to get a single-column view, or drag it back to Columns for the data table view.

Please refer to other Excel training tools on how to make use of Pivot Tables.

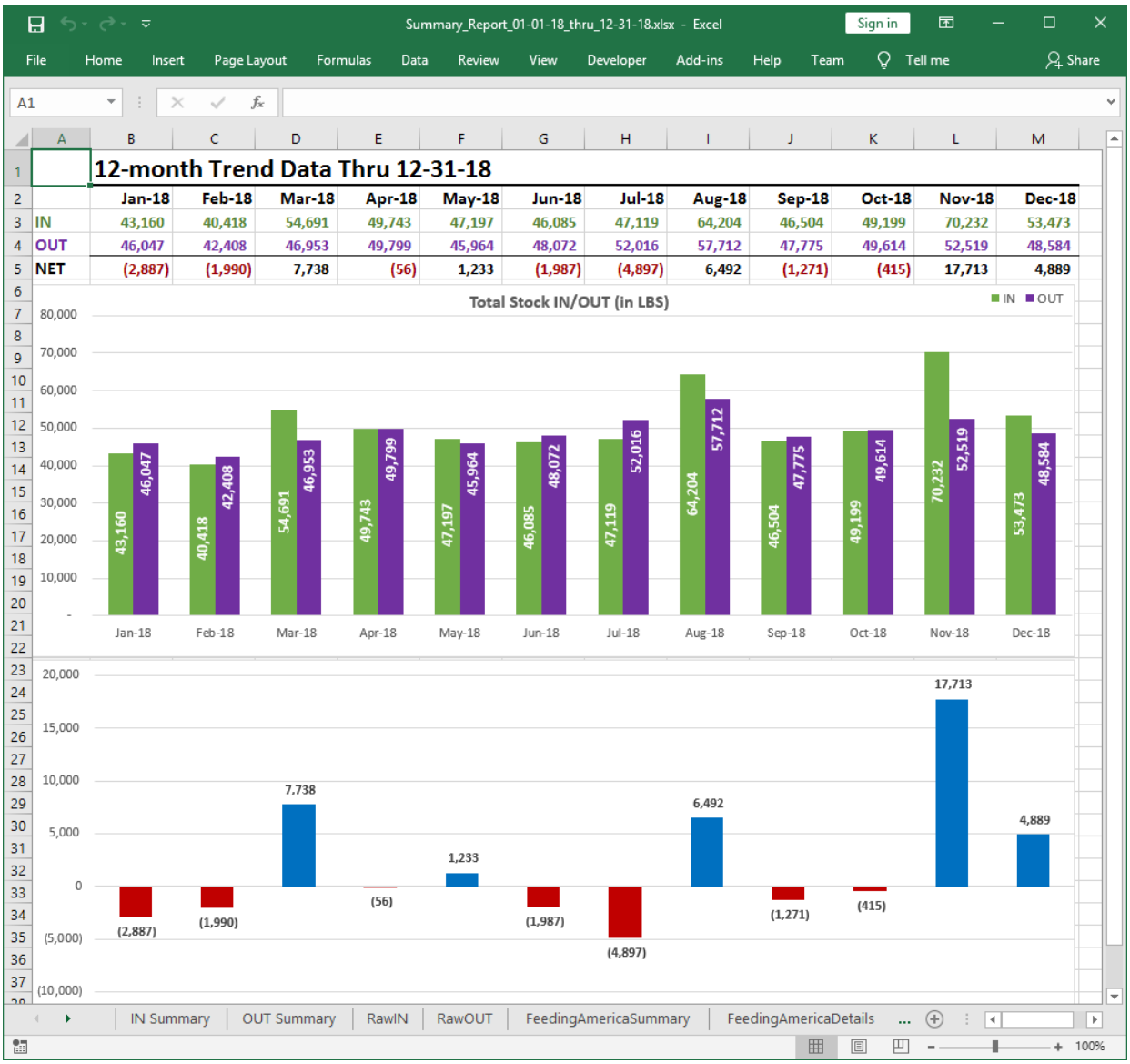


Sources	Summary
Aldi Location 1	224
Bakery	111
Meat	113
HyVee Location 1	3,311
Bakery	985
Dairy-Eggs	1,379
Meat	57
Misc Groceries	79
Prepared Foods	717
Produce	94
HyVee Location 2	5,271
Bakery	2,180
Dairy-Eggs	928
Misc Groceries	2,123
Produce	40

5.2.6 Trend



If the Include Trend box was checked prior to the report being generated, an additional worksheet is shown with a summary of the IN/OUT data on a month-by-month basis over a 12-month period, ending with the end month date specified in the date range.



The top chart shows the IN data totals for each month in green and the OUT data totals in purple, while the bottom table shows the Net (difference) between the two.

5.3 Feeding America MealConnect™ Receipt Report

An Excel file is supplied which gathers data from the database to generate a file for bulk uploading of receipts into the Feeding America MealConnect website. By default, this file is located in the same directory as the rest of the Inventory software.

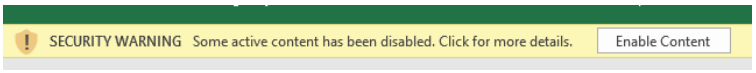
FeedingAmerica_MealConnect_Template.xlsm

To access this report, either launch it directly from the Windows File Explorer (suggestion: add a desktop shortcut icon) or from the MealConnect™ Bulk Upload button provided in the Reports screen.

NOTE to OFFICE 365 Users: you must use the desktop version of Excel in order for the macros to work properly.

5.3.1 Initial Use: Excel Security Warning

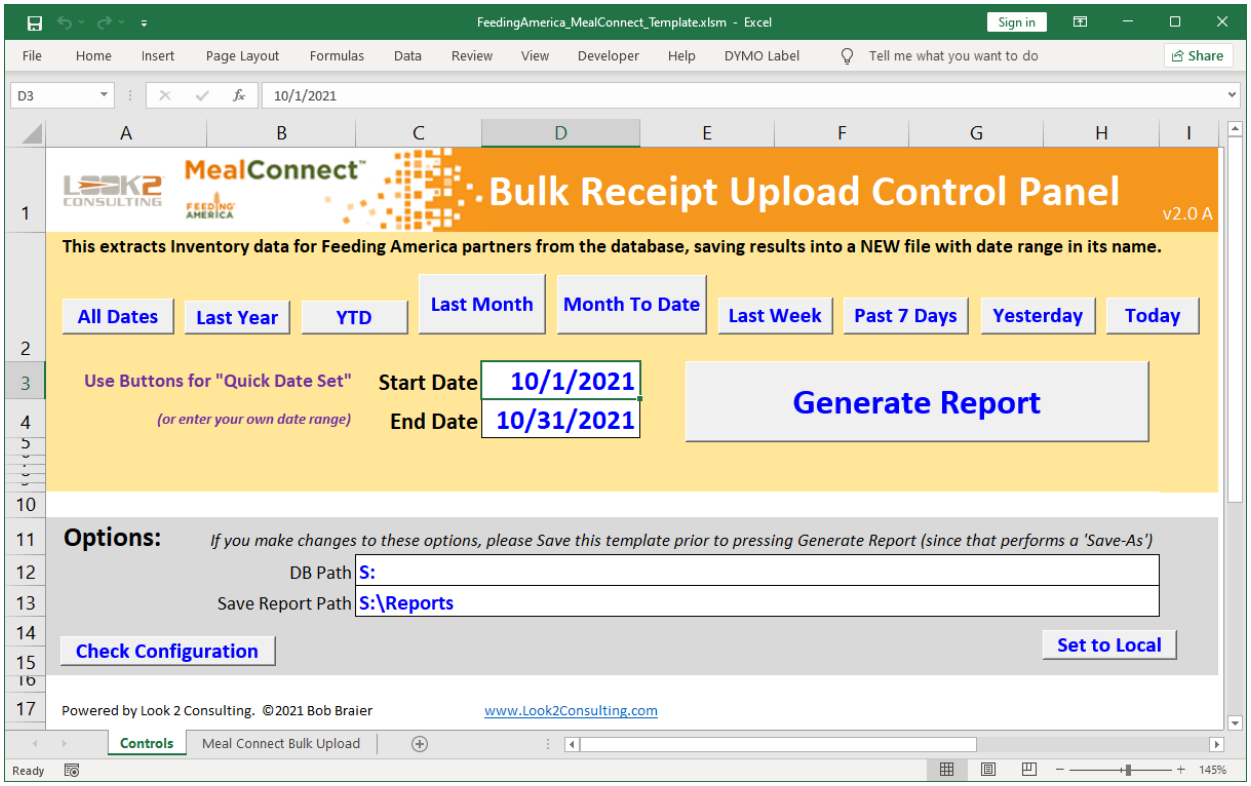
The first time you launch the file, if Excel hasn't be fully configured yet it may present a Security Warning. This is Microsoft Excel telling you the file contains a Macro (which is used to get the data from the Access database for the report).



Simply click the Enable Content button located at the top of the window, and then Save the file. It should not warn you again. NOTE: you can also set the Inventory directory as a trusted location in the Microsoft Excel Trust Center.

5.3.2 Report Controls

The first worksheet in the Excel file contains the controls for generating the report.

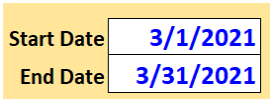


This Excel file uses macros to extract the data from the Access database(s) and stores the results into a separate report file in the \Reports subdirectory (this way the "master template" does not get overwritten). Each report generated gets a filename with the date range used for that report (e.g., *MealConnectBulkUpload_03-01-21_thru_03-31-21.xlsx*).

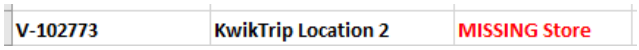
The Data is extracted from the database found in the path specified in the Options section of the main Controls sheet. By default this should be the mapped "S:" drive, but could be something different depending upon your location's configuration. You can press the Set to Local button to automatically configure these options to point to the local directory in which the file is located. In general, once this is set and saved, the master template file should not be altered.

IMPORTANT for OFFICE 365 USERS - you MUST set the "Auto-Save" option to "OFF", otherwise this template could become compromised.

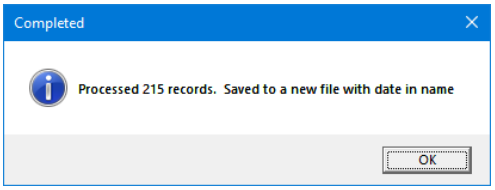
The Excel report file works with a Start/End Date range and provides the Quick Set buttons to make the entry easier.



See Sections 4.8.9, 4.8.17 and 4.11.3. for details on configuring your Inventory system to properly generated these values so it can interface with MealConnect. You can press the Check Configuration button to perform a cursory test of the system, showing a list of the locations defined as Feeding America Partners. Entries identified as having issues will be flagged in red and must be fixed prior to importing into MealConnect.



Once the date range desired has been entered, press the Generate Report button to initiate the macro which in turn extracts the data from Access and puts it into the Excel report. It reports the total number of receipts processed.



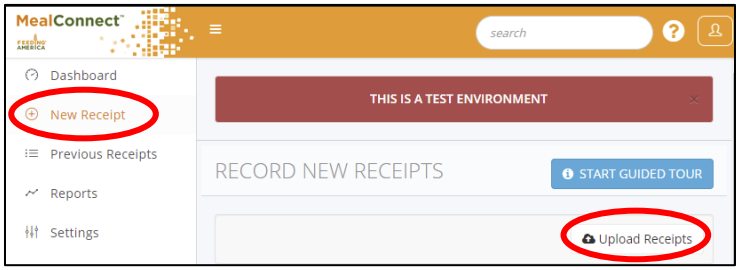
The macro automatically closes the template, saving the report with the date range in the new filename.

5.3.3 Meal Connect Bulk Upload Sheet

The generated sheet includes column headers used by the MealConnect website. It is important that these not be modified.

	A	B	C	D	E	F	G	H
1	Banner Number	Donor Name	Store Number	Pickup Date	Bakery [1-2]	Dairy-Eggs [4-3]	Meat [3-4]	Misc Groceries [13-2]
2	D-2966	Epic	D-2966	1/4/2021	0	0	0	301
3	V-102773	KwikTrip 6133 McKee	957	1/4/2021	9	0	0	0
4	V-102773	KwikTrip 6133 McKee	957	1/4/2021	0	0	164	0

There is a separate document covering the details on uploading these records into the MealConnect system (available on the website).



5.4 Commodity Details Report

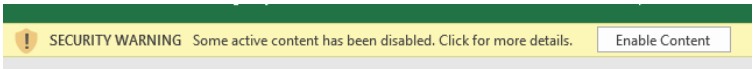
An Excel file is supplied which gathers data from the database to generate a report to help analyze commodity details. By default, this file is located in the same directory as the rest of the Inventory software.

CommodityDetails.xlsm

To access this report, either launch it directly from the Windows File Explorer (suggestion: add a desktop shortcut icon) or from the Excel Commodity Report button provided in the Reports screen.

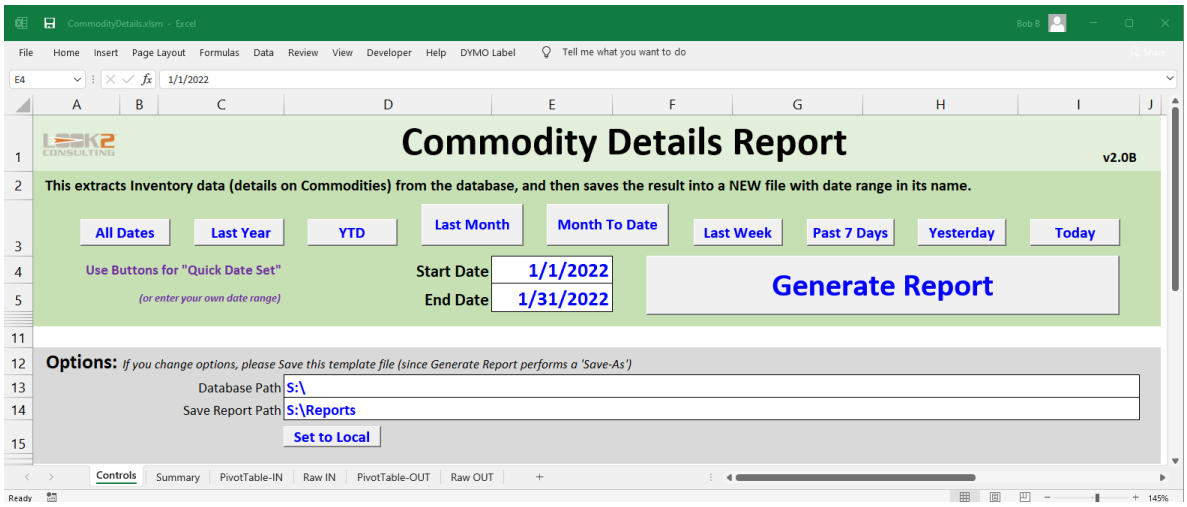
NOTE to OFFICE 365 Users: desktop Excel must be used in order for macros to work properly.

The first time you launch the file, if Excel hasn't be fully configured yet it may present a Security Warning. This is Microsoft Excel telling you the file contains a Macro (which is used to get the data from the Access database for the report).



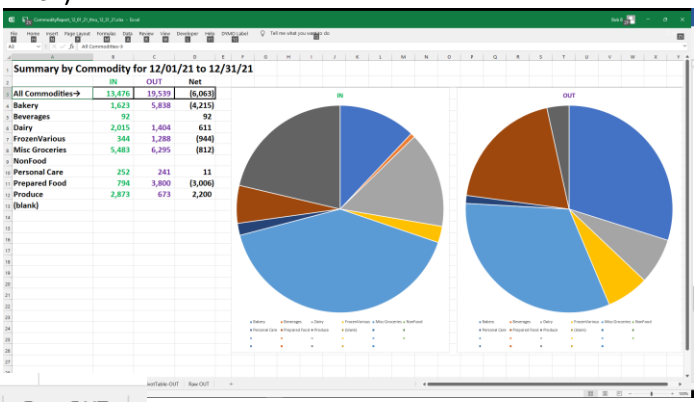
Simply click the Enable Content button located at the top of the window, and then Save the file. It should not warn you again. NOTE: you can also set the Inventory directory as a trusted location in the Microsoft Excel Trust Center.

The first worksheet in the Excel file contains the controls for generating the report.

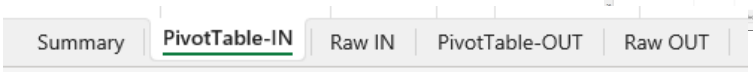


This Excel file uses macros to extract the data from the Access database(s) and stores the results into a separate report file in the \Reports subdirectory (this way the "master template" does not get overwritten). Each report generated gets a filename with the date range used for that report (e.g., *CommodityReport_12_01_21_thru_12_31_21.xlsx*).

The first worksheet in the report gives an overview of the commodities brought in within the given timeframe. If your organization also tracks outgoing commodities, those are shown as well.

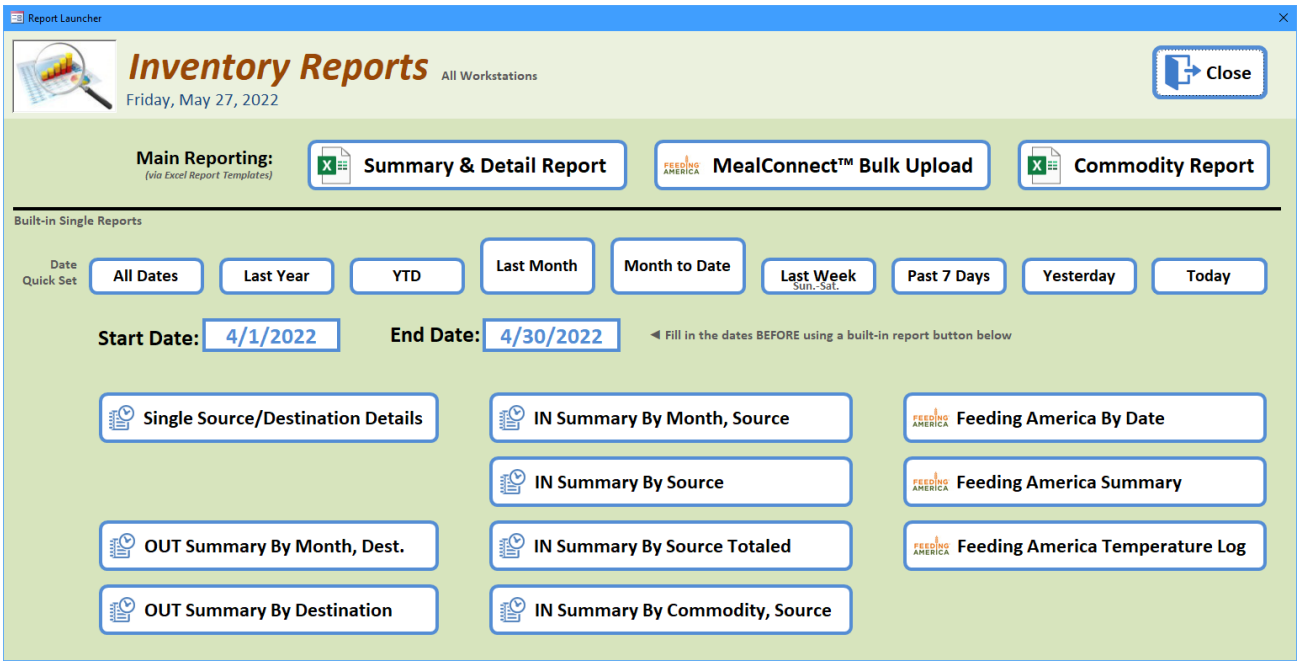


There are 4 additional worksheets showing the raw IN and OUT data details, as well as pivot tables tied to those values.



5.5 Inventory Report Screen

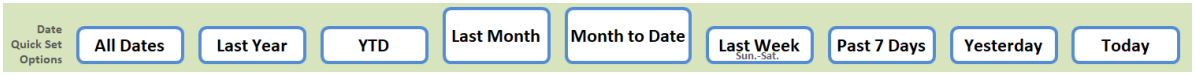
In addition to the Excel Reports described earlier, various reports are also included within the software itself, accessible to Administrators via the Reports button (see Section 4.5). The Inventory Reports screen is as follows:



5.5.1 Date Range

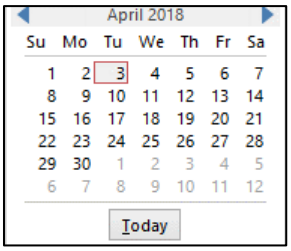
Before generating a report, you must first select a timeframe for that report. This can be done by either:

- Clicking one of the buttons at the top of the screen to pre-fill in the Start/End Dates



- Entering in a date directly in the Start and/or End Date fields

When you click on a date entry, a small calendar icon appears in the upper-right of that field. You can click that icon to show a calendar pop-up selection window.



TIP: You can use a combination of the above 2 methods: first click a button to pre-fill a date range as a starting point, then adjust manually as desired.

5.5.2 IN / OUT Summary Reports

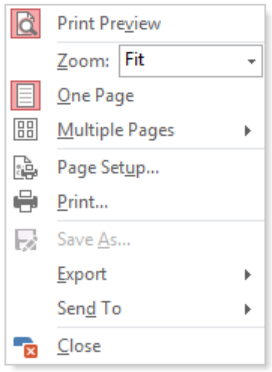
The software has a few basic reports to provide quick summaries of your inventory. There are four IN Summary reports and two OUT Summary reports. Depending upon the date range selected, these can turn into Annual Reports, or Quarterly, or Monthly, etc.

5.5.3 Headers

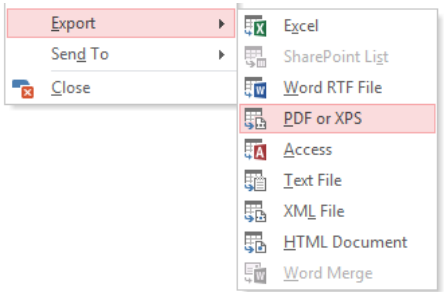
Each report has a header which will show your site's logo, the title of the report, the date range selected, and when the report was printed (generated).

5.5.4 Print/Export Controls

When the report gets generated, it appears in a Print Preview pop-up window.



By right-clicking on the report, a pop-up menu appears offering various View choices as well as Print and Export choices.

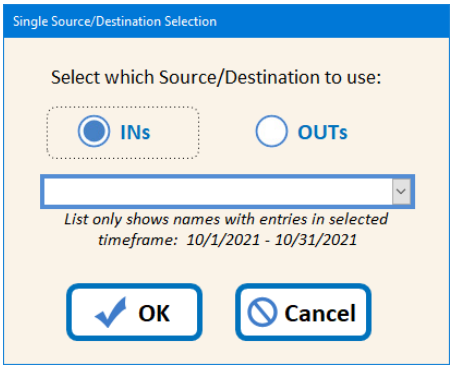


For example, you can select Export and then choose to save it to a PDF file.

TIP: when using a touch-screen without a mouse, you can "right-click" by performing a "long-tap" (i.e., press and hold your finger on the screen).

5.5.5 Single Source/Destination Details Report

Clicking on the Single Source/Destination Details button brings up the following selection dialog:



Select either the INs option or the OUTs option.

The dropdown list then gets populated with all of the names of the INs or OUTs having entries within the timeframe selected on the Reports screen. (If there are none, the dropdown list will be blank … choose another timeframe).

Select which entity to report on and press OK. A detailed list of all data recorded for the entity is shown in a report.

5.5.6 Feeding America Receipt Reports

The software includes two reports to help organizations with their monthly Feeding America reporting requirements. This information is also provided in both the Excel reporting tool and the MealConnect bulk upload tool, described in Sections 5.2.5 and 5.3. **It is highly recommended to use those other reports.** These are only provided for backwards compatibility purposes.

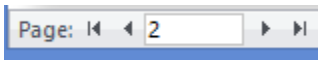
The only IN Sources included in these reports are those having their Feeding America box checked (set to True) in the CONFIG system (described in Section 4.8.17).

It only includes entries donated by such sources (i.e., it does not include weights whose entries are designated as Purchased).

The first report gives a list of what was donated by each Source sorted by date, and further broken down by Commodity (e.g., X lbs of Bakery, and Y lbs of Meat).

The second report provides a summary of the total weight by Commodity for each source (within the timeframe specified), as well as a sum of the totals of all Commodities for each source, and finally a grand total for all sources.

TIP: at the bottom of the Print Preview screen are controls for scrolling thru pages.



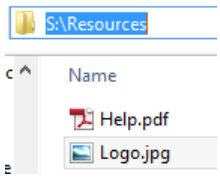
5.5.7 Feeding America Temperature Report

The software also includes a report to show the temperature logs with the selected timeframe for Feeding America partner pickups where the commodity was refrigerated/frozen and a temperature was recorded along with the weight.

6 Customization/Configuration

The software is highly configurable, not only the data options offered but also in the functionality it provides. This section discusses the various options available for customization.

6.1 Logo



Your organization's logo appears within the header of the built-in reports.

The software uses the file with the name ***Logo.jpg*** (or *Logo.png*) in the Resources subdirectory where the GUI file is located. To avoid pixilation, it should be 96 pixels high. As for width, it can accommodate an image up to 132 pixels wide without distortion (beyond that, scaling may pixelate and/or make it appear off-center). If your logo changes, simply replace the logo file with one having the same name, but containing your updated image.

6.2 Sounds

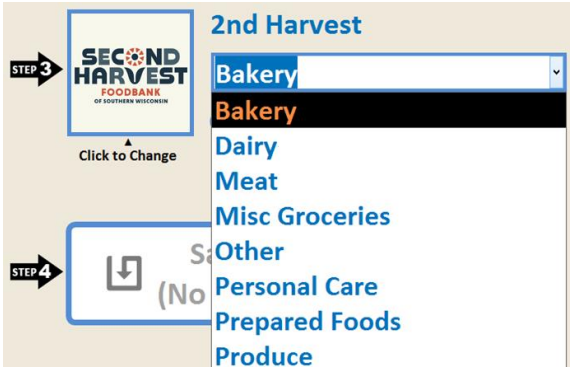
Whenever the software communicates with the scale or when it saves a record, it plays a tone (as a means of positive feedback for the user). While you can adjust the volume of the playback using the Windows volume control, you can also configure the sounds that are played.

Located in the Resources subdirectory are two files: *RecordSaved.wav* and *ScaleComm.wav*

You can also elect to not have it play any sound by setting the Play Sounds (parameter 15) to False.

6.3 Commodities

When the user selects the IN Source of the donation, they can also designate the commodity via the dropdown list (example shown to the right).

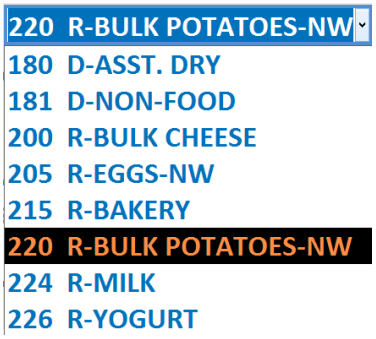


This list is configurable. They are stored in tblCommodities in the CONFIG database (ID in that table is not relevant), and can be edited by the Admin (Section 4.11.3).

The example shows 8 categories; your list can be different, depending upon which regional Food Bank you partner with and which Feeding America MealConnect codes they have configured.

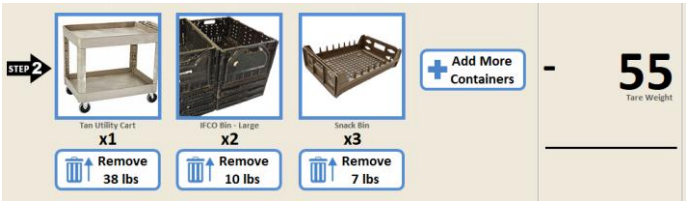
Width Considerations:

- There is an option in the System Settings for also logging whether the item being recorded has been purchased or donated. If this is being logged, please try to keep the text so it is no wider than that used by "Prepared Food" (so it fits in the space provided in the view tables in the user interface).
- If the donated/purchase category is not being logged, that column is hidden in the user interface view tables … so there is more room for wider commodities. To the right is another example where donated/purchased is not used, so the Commodity column can show longer names. It also shows an example of having a code precede each commodity name.



6.4 Carts/Containers for Taring

As described in Section 2.2, when items are weighed there is an option to specify the container(s) being used, so their weight can be subtracted out.



In the example shown, there's 1 tan utility cart, 2 collapsible bins, and 3 snack bins on the scale, adding up to 55 lbs. of tare weight.

The details for these containers can be edited by the Administrator within the program itself (per Section 4.6), but you can also directly edit them via the Access tblContainers table within the CONFIG database.

Please see Section 4.6 for complete details on each of these fields.

In general, use the in-program editor. Only use the direct-table-edit capabilities of MS Access if you know what you're doing and need to make bulk edits.

6.5 IN Sources, OUT Destinations

When weighing items coming into the system, operators select the "IN" source. When weighing items that will be leaving, operators select the "OUT" destination. As with the containers, these are shown via a pop-up selection window, and example of which is shown:

The details for these containers can be edited by the Administrator within the program itself (per Section 4.7), but you can also directly edit them via the Access tblWhatWhere table combined with group entries in the tblGroupMembers table within the CONFIG database.

Please see Section 4.7 for complete details on each of these fields.

In general, use the in-program editor. Only use the direct-table-edit capabilities of MS Access if you know what you're doing and need to make bulk edits.

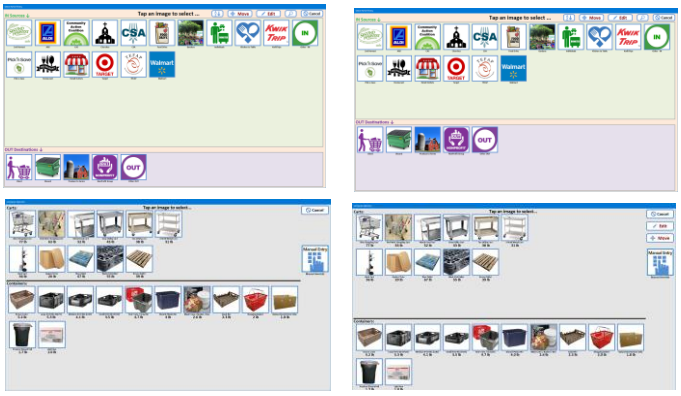
6.6 Additional Options

Here is a list of additional configuration items/options in the CONFIG database:

- (ID 1) Organization Name: *enter text for inclusion in reports and at the top of the main screen*
- (IDs 2-8, 19) Scale Communications Parameters: *covered in next chapter*
- (ID 9) Default IN/OUT ID: *number designates which IN/OUT Slot ID is shown when the software first boots up, as well as after an OUT source has been logged*
- (ID 10) Show IN Table: *if False, hides the IN table … handy if the scale is only used for OUT Destinations*
- (ID 11) OUT Table Rows (0-25): *if 0, the OUT table is hidden. Otherwise, it determine how many rows are used to show the OUT records on the main screen (with the number of IN rows adjusting accordingly)*
- (ID 12) Use Extra Info (Associated ID, etc): *per 2.5, works in conjunction with TrackID setting for each Source/Destination*
- (ID 13) Admin Password: *if blank, won't prompt when pressing the Admin Login button ... recommended only for development purposes!*
- (ID 14) WorkstationID: *in multi-workstation environment, each PC can have a unique number assigned to track where entries came from*
- (ID 15) Play Sounds: *if False, sounds won't be played for scale communications, nor record saving*

- (ID 16) Uses IN/OUT Codes: *per 4.8.9, determines if codes are shown and searchable*
- (ID 17) Allow Unstack Mode: *per Section 2.1.5, used when unloading a pallet/container with multiple commodities and/or sources*
- (ID 18) Uses Category (How): *if False, completely hides the Donated vs Purchased column and prompts*
- (ID 20) Show Dollar Value: *if True, shows donors the "dollar value" of the lbs donated*
- (ID 21) Dollar Rate: *used in conjunction with ID 20, specifies the dollars/lb rate used in the calculations*
- (ID 22) A password to "close the main form" when right-click is used
- (ID 23) A password for toggling the Edit button at the bottom of the IN/OUT lists *(if blank, won't prompt)*
- (ID 24) A password for the Lock Screen *(if blank, won't prompt)*
- (ID 25) Default Cart (blank = none): *ID Slot of Cart/Container to use when the software first boots up and upon any subsequent saving of a reading*
- (ID 26) Show Data for: (All, Self): *in a multi-station environment logging to a common DATA file, this parameter indicates whether the IN/OUT tables show data from all workstations or just the current one*
- (ID 27) Allow Gleaned as How Category: *if True, "Gleaned" is shown in addition to Donated/Purchased*
- (ID 28) Out Logs Category, Commodity: *if True, Out data also include Category and Commodity selections*
- (ID 29) Out Allows TEFAP, CSFP: *if True and "Out Logs Category, Commodity" is also True, these choices are then shown when saving an OUT record (helpful for food banks)*
- (ID 30) Auto-select Default ID after Out: *if True, any time a weight is saved to the OUT table, the configured Default ID will automatically be selected. If False, any selected OUT Destination will remain selected after saving the data.*
- (ID 31) Allow Multiplying of Net Weight: *if True, a button appears on the main screen to prompt for # of items weighing the same amount, so a multiplied net weight gets recorded*

- (ID 32) Number of IN Rows (1-4): a*djusts how many rows (how tall) the IN section is on the IN/OUT Selection Screen. The number of OUT rows automatically adjusts.*
- (ID 33) Number of Cart Rows (1-4): a*djusts how many rows (how tall) the top Cart section is on the Cart/Container Selection Screen. The divider line moves, with the number of Container rows automatically adjusting.*



- (ID 34) Reset Multiplier On Save: *used when "Allow Multiplying of Net Weight" ID31 is True. If this parameter is True, then whenever a record is saved, the multiplier value gets reset back to 1. Set this to False to keep the entered value for subsequent scale readings.*
- (ID 35) Log IN Temperatures: *if set to True, then donated items of a commodity set to Track Temperatures from Feeding America sources will prompt the user for the temperature prior to saving.*
- (ID 36) Show Minimize for Admin: *if set to True, a button appears in the upper right (and the Help button is hidden) when Admin is logged in, allowing the application to be minimized.*

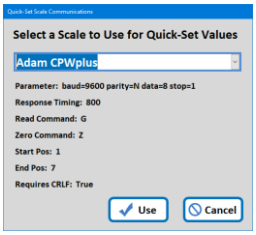
These parameters are accessible to the Admin via the System Configuration button, per Section 4.11.

7 Scale Communication Configuration

The Inventory Software has been successfully tested with the following scale indicators *(these should be set to print only on demand):*

- Doran DS100
- Rice Lake 420 Plus
- Rice Lake IQ PLUS 390
- BTEK T103SB
- GSE 350
- Salter Brecknell SBI-100, PS2000
- Adam Equipment CBC 100a
- Adam Equipment CPWplus XXX (e.g., 150)
- PrimeScales PS-IN202
- Optima OP-900

Please consult the manufacturer's manual on how to enable RS232 Serial Communications, verify parameters (e.g., labels off, etc.) and in most cases that Continuous Print option is set to off.



The settings used for communicating with these scales are in the tblParameters table within the MYPC database file, examples of which are shown below (these may vary depending upon your scale's specific settings). You can set these using the Scale Comm Quick-Setup feature as described in section 4.11.2.

ID	Scale Model	Adam CBC100a	Adam CPWplus	BTEK T103SB	Doran DS100	Optima OP-900	GSE 350	Prime Scale PS-IN202	RiceLake 420Plus	RiceLake IQ PLUS 390	Salter Brecknell SBI-100
2	COM Parameters	baud=4800 parity=N data=8 stop=1	baud=9600 parity=N data=8 stop=1	*Same*	*Same*	*Same*	*Same*	*Same*	*Same*	*Same*	*Same or could be 7E1*
3	COM Port	3	3	3	3	3	3	3	3	3	3
4	Response Timing ms	1000	800	800	800	800	800	800	800	800	800
5	Read Command	P	G *(or N)*	P	W	R	%p	@G	P	P	W
6	Tare or Zero Command	T	Z	Z	Z	T	%z		KTARE	KTARE	Z
7	Response Start Pos	1	1	1	2	2	2	2	1	2	2
8	Response Length	6	7	9	7	10	8	8	6	8	9
19	Requires CRLF	True	True	True	FALSE	True	FALSE	True	True	True	True

NOTE: if Scale COM Port is blank, the software switches to Manual Entry Mode, per Section 2.1.6.

Depending on the model, the scale may have an external communications port with a DB-9 connector, or an internal port requiring direct wiring of a "pigtail" end (typically just 3 wires: Tx, Rx, Gnd). You will need the appropriate RS232-Serial-Port-to-USB-cable to physically connect the scale (available online for ~ $20).

Male DB9 to USB

Female DB9 to USB

Pigtail to DB9

USB to RS232 Serial

8 IT Topics

This section covers some miscellaneous topics of interest to IT staff.

8.1 PC Requirements

The system has been designed to work as a local application (i.e., not web-based) on a PC having:

- **OS:** Windows 10 or 11.
- **Display:** resolution of 1920x1080 or 1920x1200, at 100% scaling (not more, not less)
- **Touch Screen:** while a touch screen is not "required", the software has been designed to work with one and is HIGHLY recommended. An "All-in-one" PC with a 21" or larger screen works great! Conversely, a 14" laptop is too small of a touchscreen.
- **RAM:** the software needs enough RAM to run the OS, Microsoft Access and Excel. The combinations of various versions can be complex, but it has been successfully tested on a system with 6GB of memory.
- **Hard Drive**: the software does not take up much disc space (< 1 Gig), so any modern computer should have adequate disc storage space for the software and its reports. An SSD will improve performance.
- **Speed:** the CPU Benchmark Rating of the computer's processor should be > 2500. However, if it is getting its data from a Local Solid-State Disk (not over networking, etc.), then the rating can go even lower (successfully tested @ 2158).
- **Networking**: if the software is connected to its back-end databases locally, network speed/reliability should not be an issue. If the linked database files reside on another PC and/or Server, it is strongly recommended that a wired connection with 1G speed be used.
- **Microsoft Access/Excel:** the software has been tested with the desktop version of Office 365, Office 2019, and Office 2016. Non-profits can get a discounted copy via Tech Soup: www.techsoup.org. You can also run the GUI with the **FREE runtime version of Access** *(though you won't be able to make back-end edits at the PC, nor get rid of the start-up warning).*

  NOTE: the software has also been configured to have the two back-end databases (DATA and CONFIG) run on SQL Server / SQL Express. Please contact Look 2 Consulting if this is something that's desired.

8.2 Files, Archive, Backup

This section covers the main files which comprise the Look2 Inventory system, and thoughts on making backup copies of not only the system, but daily (or even hourly) backup of the data generated.

8.2.1 Inventory Files

The main portion of the software has been designed to use these Microsoft Access files:

- **Look2_Inventory_GUI.accde** – contains forms and programming modules defining the software interface. It has links to the tables in the CONFIG and DATA files (per below), and automatically relinks to a local copy of the MYPC backend file. To enable deployment of the software to multiple

sites without having to re-link files, the directory gets mapped as an "S:" drive.
NOTE: if you have 32-bit Office installed, you would run ***Look2_Inventory_GUIx32.accde****.*

- **Look2_Inventory_CONFIG.accdb** – config file with tables: tblCommodities, tblContainers, tblGroupMembers, tblWhatWhere. It also contains queries used by the Excel report file.
- **Look2_Inventory_MYPC.accdb** – config file with tblParameters
- **Look2_Inventory_DATA.accdb** – main DATA file, contains tables: tblInventoryIN, tblInventoryOUT. It also has links to tables in the CONFIG file, and has queries for the Excel report file.

Additionally, there are the Excel template files which extract data from the above DB files to produce Excel reports: ***SummaryReport_WithRaw_Template.xlsm, FeedingAmerica_MealConnect_Template.xlsm***

There are also subdirectories:

- **Resources** – contains files used by the software (Help PDF, font, logo, sound files, EULA, ico file)
- **Reports** – default location for output files generated by the Excel report templates

Because this system works in conjunction with Microsoft Access, there are no other "installed" files; it is all self-contained within the main Inventory folder (and any shared DATA folder for multi-station installations, per below in Section 8.3).

8.2.2 Dropbox/GoogleDrive/Microsoft One-Drive Considerations

While this software has been used with both Dropbox and Microsoft's OneDrive (cloud storage solutions offering automatic backup and remote access), it is NOT recommended to run the main DATA/CONFIG databases from such drives.

Rather, it's better to make daily backup copies of your database files to such locations (using the built-in Windows Backup and/or Task Scheduler tools, per section 8.2.3).

The main reason is this: <u>you cannot open the Access databases on more than one client at the same time.</u> Doing so will cause a "share conflict" and result in the creation of multiple copies/instances of the database file(s). Should this happen, you will see more than one copy of the DATA.accdb file, but with slightly different names (the cloud-programs add the user's names in parenthesis, with Dropbox also adding the words "conflicted copy" and the date). The data then diverges into 2 (or more) databases, effectively BREAKING the system! The resulting mess forces you to then try to merge the records from the multiple files back together (not an easy task!).

So, to prevent the database files from opening up more than one copy at one time and hurting your system<u>, only create backup copies to such cloud-based storage directories.</u>

8.2.3 Backup

➲ **IMPORTANT: Creating backups of the system and data is left to your organization's IT staff.**

While the task of creating both an initial copy of the Inventory system as well as frequent backups of the data generated by the system is the responsibility of each organization and varies depending upon the computer systems in place, this section gives an overview to assist in those efforts.

An initial backup snapshot of the system is important to capture the configuration files necessary for the system to run with the settings for a given site.

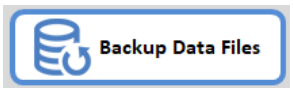
➲ **Simply make a copy of the entire Look2 Inventory Software directory and its subdirectories.**

As for regular backups, the primary file that changes on a day-to-day basis is the DATA file. So, unless there are changes to the configuration files (change in IN Sources, OUT Destinations, passwords, etc.), there is only one file needing regular backup. The size is very small (example: 10,000 IN records and 14,000 OUT records has a database size < 5MB).

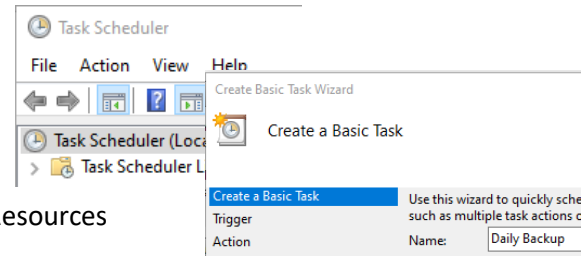
Alternatively, if you have the back-end databases running in SQL Server, you will take care of archiving via the mechanisms provided by that database system.

There are many solutions to backing up data. Here are some thoughts to help you with this endeavor.

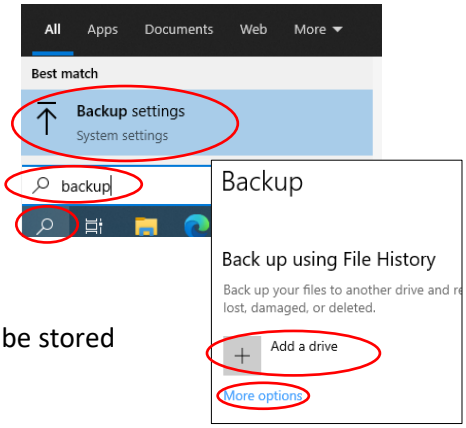
You can make a quick manual backup of the CONFIG/DATA/MyPC database files using the Backup button in the Settings screen (see Section 4.11.5).



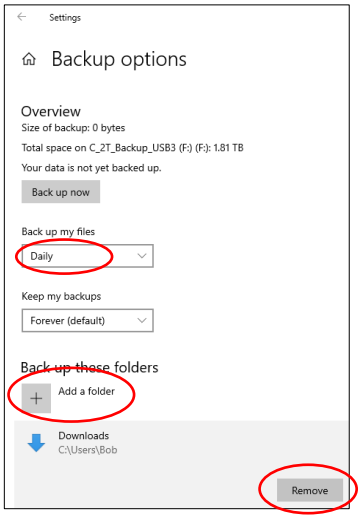
You can use the Windows Task Schedular and use the Create Basic Task Wizard to run a nightly batch file to make copies of just the desired files. To help with the "Program/script:" to use in the Action step of the Wizard, a template for you to modify *(requires knowledge of how .BAT files work)* can be found in the Resources directory: *BACKUP_MakeLocalDatedCopyOfData.bat*



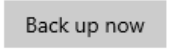
You can use Windows Backup to back up the entire Inventory system (around 40-60Meg). Here is a quick summary of how to use this method to schedule a backup. *(Windows 10)*



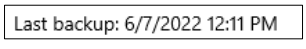
1. Click the Search Icon in the Windows taskbar and start to type "Backup". As you type, you should see "Backup settings" appear in the list.
2. Click on *Backup settings* to launch it
3. Click *Add a drive*, and select where you want your backups to be stored



4. Click on *More options*
5. Select the frequency you want to back up the data (e.g., Daily)
6. Click on *Add a folder,* select where the Inventory software is installed
7. Remove all folders you do NOT want included in your backup
8. Click the *Back up now* button to initiate the first backup



You can verify backup is working via the Backup options screen, which shows the date/time of the last one:



Windows Backup creates a folder named "FileHistory" in which the files are stored. The date/time of the backup is appended to each name.

8.3 Multi-Workstation Configuration

Some locations have more than 1 scale, and thus require more than 1 PC to collect the data.

You can elect to either keep the different Inventory systems completely separate (i.e., they each have their own CONFIG and DATA backend files and run 100% independently from one another), or you can choose to share data from these back-end databases (either in whole or in part).

8.3.1 Isolated Systems

To keep them isolated, simply have different directories where the CONFIG and DATA files are stored. Each PC would still map these to an S:\ drive, it's just that they would be pointing to different directories for those mapped drives.

If using SQL Server, have different table names (e.g., InventoryDATA1, InventoryDATA2, InventoryCONFIG1, InventoryCONFIG2, etc.) for each workstation and use the appropriate link in the GUI front-end file.

They would thus have independent sets of In Sources and Out Destinations, as well as their own Carts/Containers. Reports would be independent as well.

8.3.2 Shared DATA

If you wish for each workstation to log all the data into one common set of DATA tables, simply have them all link to that one common database. This is done by mapping the S:\ drive to the same directory so they all share the same DATA Access file.

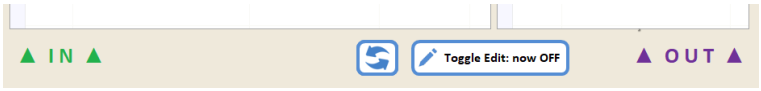
If using SQL Server, make sure they all link with a DSN pointing to the same database IN and OUT tables.

If you wish to distinguish which workstation is writing which records, you would need to change the ID for each PC via the Settings Parameter 14: WorkstationID. The default is 1, but you can elect to make the 2nd one be 2, and so on.

The WorkstationID gets logged with every entry to the IN and OUT database tables.

If you distinguish the Workstation IDs for each PC in your shared data environment, you can also configure it such that each workstation shows data from all workstations, or just data logged from itself. This is done via Settings Parameter 26: Show Data for: (All, Self).

NOTE: if set to All, a refresh button also appears on the main screen below the IN/OUT tables (as entries only update when various buttons are normally pressed within the system).



8.3.3 Shared CONFIG

You can also elect to either point all workstations to the same CONFIG database tables (so an update to a Source/Destination is shared by all), or they can have different CONFIG links.

This can be done as a whole (i.e., all tables within the CONFIG database), or you can elect to keep most tables common, but re-link only some of them. For example, you can keep the same Carts/Containers, yet have different IN/OUT Sources/Destinations. Mix-and-match as your specific situation dictates.

8.3.4 Separate MYPC

Regardless of whether you're sharing the CONFIG and/or DATA files, each instance of the software should have its own MYPC database file. This stores the parameters for each machine, allowing you to have different brand of scales connected, different workstation ID's, and so on. Simply store the MYPC database file in the same directory as the main GUI program itself.

Further details on setting up the software are given in the separate document *(available on the website)*: *Look2_Inventory_Quick_Setup_Guide.pdf*