Quick Setup Guide for Look2 Inventory Software v3.1.3

4/18/24

This document is not a comprehensive Installation Manual ... but rather a quick-reference guide to assist someone familiar with PC's on how to go about installing the Inventory Software.

Before following these steps, make sure Office is installed with both MS Access (or the free Access Runtime) and Excel, and have read the *IT Topics* chapter in the User Manual *(PC requirements, 1920x1080 or 1920x1200 screen resolution, etc.).*

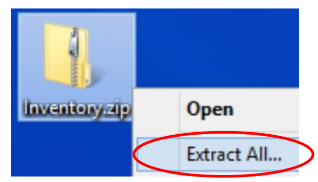
Also make sure you have read and agree to the Look 2 Consulting End User License Agreement, a copy of which can be found online here.

The basic steps for installing the software are:

- Download and unzip the files, installing the font supplied
- Configure Microsoft Access to "Trust" the files
- Link the GUI file to the backend databases according to the setup you desire
- Configure/customize the software for your organization
- Tweak some Windows settings
- Implement your Backup Plan for the data you'll be generating

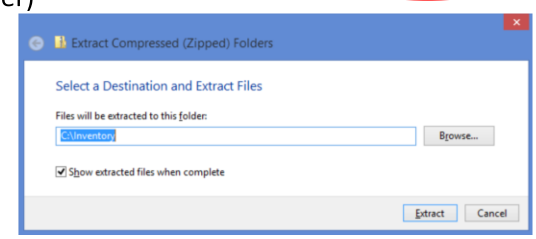
A high-level overview for each of these items is now given.

1. Extract Zipped Contents to a Folder



While the folder can be located anywhere on your computer, by way of example this guide shows creating one in the root directory of C:

a. Save the Inventory ZIP file (by default, it goes into your Downloads folder)
b. Right-click the file and choose "**Extract All...**" from the pop-up menu
c. A dialog appears. Change the path to instead just be **C:\Inventory** *(could be anywhere, but this is used for this example)*
d. Click the **Extract** button.



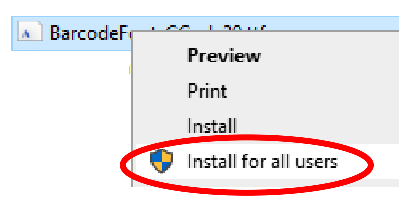
You will have the following files:

- 5 database files *(DATA, CONFIG, MYPC, and two versions of GUI)*
- 3 Excel files: *SummaryReport_WithRaw_Template, FeedingAmerica_MealConnect_Template, Commodity Details*
- A shortcut link and some documentation *(version notes and a PDF of the User Manual)*
- Sub-folder "Resources" *(containing 2 audio files, a logo, the LED-font, an ico file, Backup bat, EULA, and a Help PDF)*
- Sub-folder "Reports" *(basically empty)*

2. Install Font for LED Scale Value

The software uses an LED-looking font to represent the weight reading from the scale.

A copy of this font is in the Resources sub-directory.

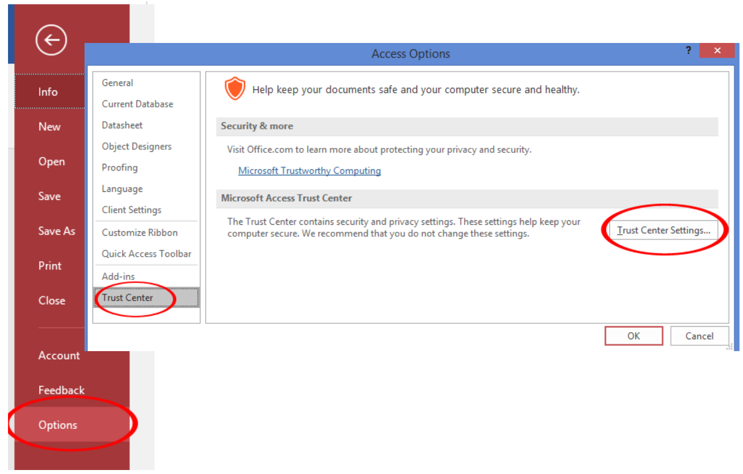


To install it, simply right-click on the file and select "Install for all users" (in Windows 11, first click the Show More Options submenu to see this option)

(If you are not able to access this menu item, you can also just install for the current user by double-clicking on the font file and clicking the "Install" button).

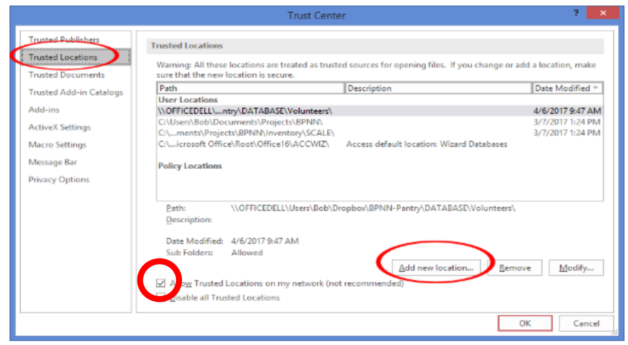
3. Trust Center Settings

So you don't get security warnings every time you launch the software, and so the macros run to configure the software upon first launch, you must make the registration folder a "Trusted File Location".
(Note: not available with the free version of Access Runtime)



To do this:

- Launch Access
- Choose Options from the main menu
- Click Trust Center in the left-hand list and then click the Trust Center Settings button
- Click Trusted Locations in the left-hand list
- Check the box: Allow Trusted Locations on my network *(so mapped drive can be trusted)*
- Click "Add new location.." button to select the folder where the GUI file has been saved
  NOTE: if you use a Mapped S: Drive per Section 5.2.2, you should come back and add that location as well once that has been set up

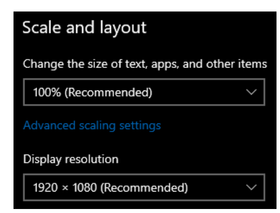


Repeat this Trust Center process within Microsoft Excel as well, so the Report macros will work too.

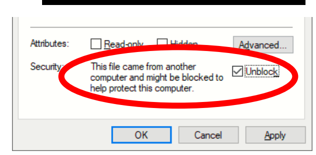
4. Initial Program Launch

Look2_Inventory_GUI.accde is the compiled database front-end, and is what you launch to run the software *(GUI stands for Graphical User Interface)*.
NOTE: if you have the 32-bit version of Office installed, you would instead run **Look2_Inventory_GUIx32.accde.**

It is suggested that you create a shortcut icon on the Desktop to make it easier to launch. One has been provided in the directory: the GUI file is assumed to be in *C:\Look2Software\Inventory,* with its icon in *\Resources*.

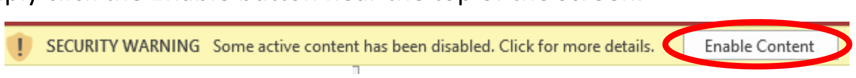


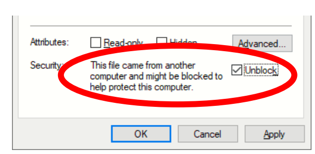
Remember: the software requires Display Settings set to 1920x1080 with 100% scaling.



Depending upon your PC's security settings you may also have to right-click on the ACCDE file and check the Unblock box at the bottom of the General tab.

When launching the file, you may get a warning from Access that the file contains disabled content. If this is the case, simply click the Enable button near the top of the screen.





When launching an Excel Report, you may get a Security Risk message with a red background. If so, you must also check the Unblock box in the report file's properties window.

If you get an error message upon launch that a path is invalid, see Section 5 below for re-linking the tables.

5. Link Front-End Program to Back-End Tables

With the "client/server" design, there are 4 database files. The GUI (Graphical User Interface) file needs to the other three "backend" databases (DATA, MYPC and CONFIG).

NOTE: the software has also been written to support the back-end databases to run instead on **SQL Server**. For more details on converting them, please refer to the separate document: *Inventory_Link_To_SQLServer_Overview.PDF*

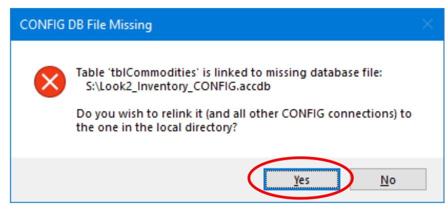
There are 3 methods for linking the tables:

1. Automatic Self-Configure/Link ... for use when there is only 1 Inventory computer *(one time per upgrade/update)*
2. Mapping the folder where the DATA and CONFIG files reside to be the S-drive *(**preferred**!)*
3. Using Access to re-link the GUI file to a different location for DATA and CONFIG *(on-going hassle/work!)*

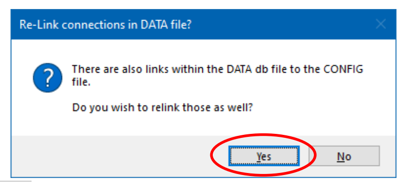
NOTE: see Section 3 and 4 for details on launching the software and what to do if your version of Access doesn't initially permit the running of these macros.

5.1. Automatic Self-Configure/Link *(NOT preferred method!)*

This is the simplest method of getting the software running, and is good for "testing out" the software. This is NOT the preferred method (which instead is covered in Section 5.2). Also, this simple method only works when you have 1 PC for inventory. If you have 2 or more machines wanting to share the same DATA and/or CONFIG file, you will have to use one of the other two methods given in the next sections. (The MYPC database file is typically kept locally and not shared, in order that scale communications and WorkstationID can be unique per PC running the software).



The Inventory software automatically checks to see if the linked DATA, MYPC, and CONFIG databases exist in the default linked location (S: drive). If not, it then checks to see if they exist in the "local directory" of the GUI file. If so, it asks permission to then automatically change its own links and self-configure these settings for you.



Simply click YES at each of the prompts: once for the DATA file, once for the CONFIG file, once for sub-links within the DATA file, and possibly once for the MYPC file (depends upon your configuration). The software should then be up and running. It will not prompt again unless you download a newer version of the software (at which time it will once again ask to be reconnected).

You will also need to use the "Set To Local" button in the Excel Reports.

5.2. Mapping to S Drive *(preferred method)*

The GUI database file (ACCDE) comes pre-configured to link to the DATA and CONFIG files if these reside in a folder mapped as the root of the "S:" directory. It also assumes reports get generated to a Reports subfolder in the S: drive. The reason **this is the preferred method** is that with subsequent updates to the software, the GUI and Report files can simply be swapped-out and the more complex re-link process can be avoided. This makes for a more streamlined, headache-free deployment.

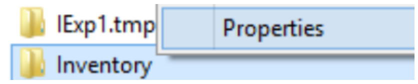
To use this mapped drive method, follow these steps:

5.2.1. Share the Inventory Backend Data Folder

Determine where you want the DATA and CONFIG backend database files. This can be on your "main" PC running inventory, or these could be on a Network Attached Storage (NAS) device, or a corporate server (thus allowing for remote access and/or automatic backup, and other server-based benefits).

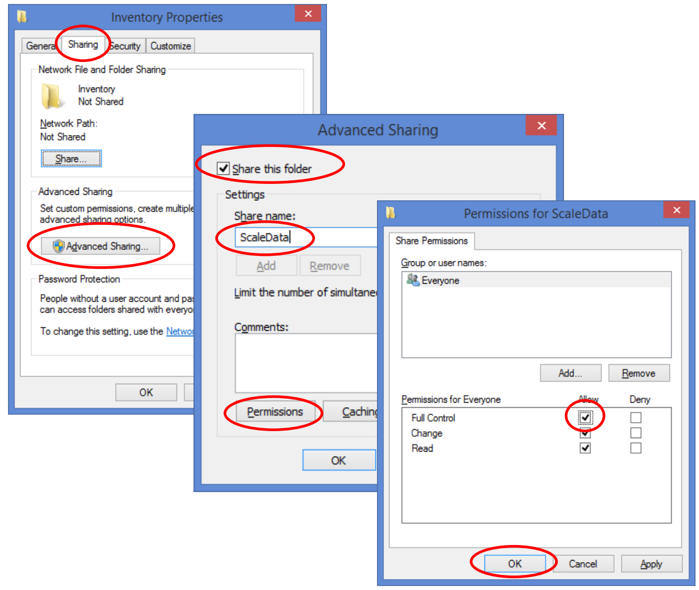
NOTE: it should NOT be one of the common "virtual cloud-storage" solutions if you're running the GUI software on more than 1 PC. See the chapter in the Inventory User Manual entitled: *Dropbox/GoogleDrive/Microsoft One-Drive Considerations.*

These steps for sharing are performed only on the computer/device hosting the DATA and CONFIG files.



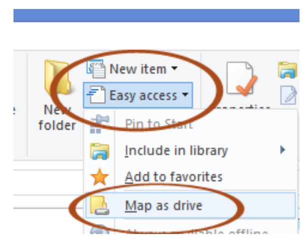
- Right-click the **Inventory folder** (in the C: drive in this example, but you could have extracted it anywhere on your network). Select **Properties**
- Click the **Sharing tab** and click **Advanced Sharing**
- Check **Share this folder**, enter the name **ScaleData** *(can be anything you wish, but this is the shared name used in this example)*, click **Permissions**.
- In the Permissions dialog, we need to allow others to not only "read" the data, but also modify it. Check the "**Full Control**" box, then click **OK**.
- Click **OK** to close the Advanced Sharing dialog.

Note that the Properties window now says the folder is shared, and the Network path is of the format **\\PC1\ScaleData** *(where PC1 is the name of your PC)*



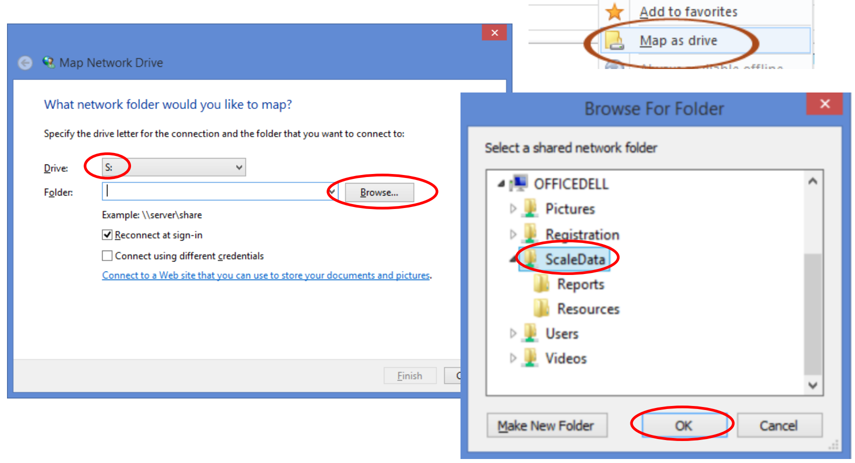
5.2.2. Map S-Drive to Shared Folder (in this example "\\PC1\ScaleData")

The final step, for each computer, is to map the S: drive to point to the main computer's shared folder containing the DATA and CONFIG files.



- In the File Explorer, click on **Easy access** and select **Map as drive**
- Select "**S:**" from the Drive list and click **Browse**
- Navigate to PC1 containing the Shared folder *(OFFICEDELL in my case, but PC1 would be the name of your main computer)*. **Select** that folder and click **OK**.
- Back in the main Map Network Drive window, click **Finish**

When done, the folder now appears as the S: drive on your PC.



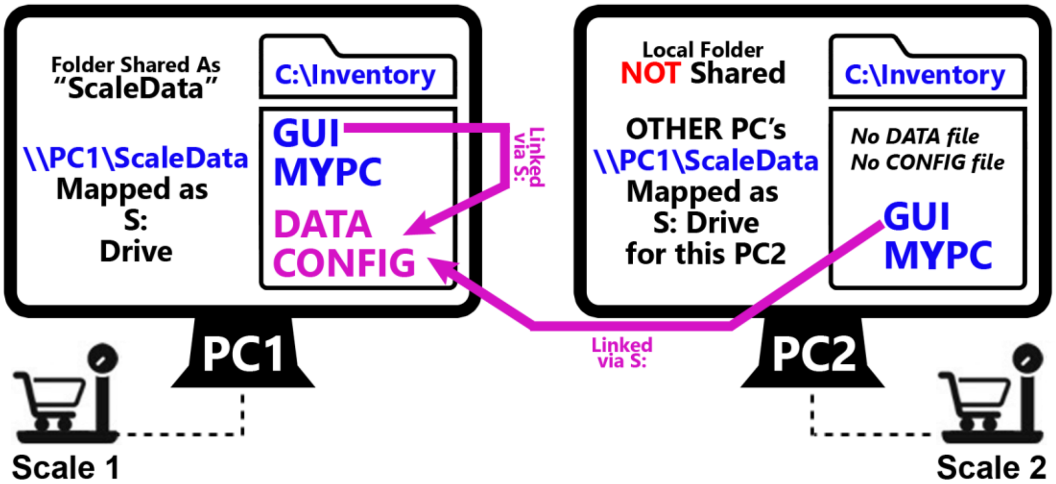
Since the Inventory GUI database is linked to the other tables assuming they are in the S directory, this process thus ensures those links now work, and the software is ready to use. You also do not have to change the directories used by the Excel Reports, since they too point to the S: drive.

5.2.3. Multiple Workstations

If you have more than 1 scale and thus have more than 1 computer connected to collect data, you can either keep them completely separate (i.e., they each have their own CONFIG and DATA back-end files), or you can choose to share one or both of these back-end databases.

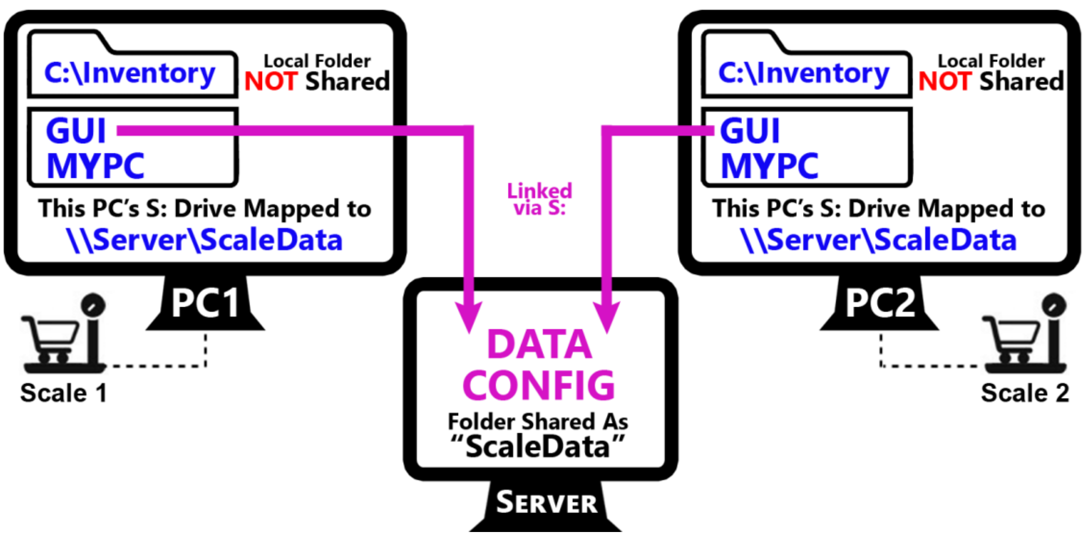
Most locations choose to share the DATA and CONFIG files, so that they only have to update once for any changes, with all workstations then being in sych with new sources and carts/containers. Furthermore, each computer most likely should point to its own MYPC file (which contains scale communication parameters and other settings).

Below is a diagram of how a typical multi-scale/multi-computer installation is configured without a central server:



PC1 has its GUI program file point to its own copies of DATA/CONFIG/MYPC backend databases, while the other computer PC2 points to a local copy of MYPC database, but points to PC1's copy of DATA and CONFIG. You would thus delete the local copy of DATA and CONFIG from PC2.

If your location has a central server, you can elect to move the DATA and CONFIG files onto that server, and then point both PC1 and PC2 to that common location (and thus delete DATA and CONFIG from both PC1 and PC2).

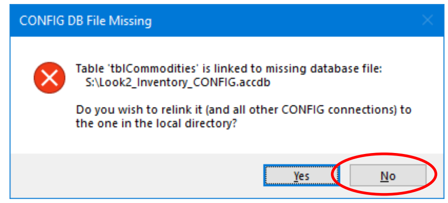


Typically you will want to distinguish which workstation is writing records into the common DATA file. To do this, change the ID for each computer via Settings Parameter 14: *WorkstationID*. The default is 1, so change this parameter to be a 2 on the 2nd computer. Also, by default, each workstation shows data only originating from that PC (which is what most users prefer). However, if for some reason you want to change it so each PC shows data from ALL workstations, not just itself, this is done via Settings Parameter 26: *Show Data for: (All, Self)*. 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)*.

5.2.4. Trust Center Settings for S:

After creating the S: drive, be sure to revisit Section 3 and make that drive a Trusted Location.

5.3. Access Link Table Manager *(NOT preferred method!)*

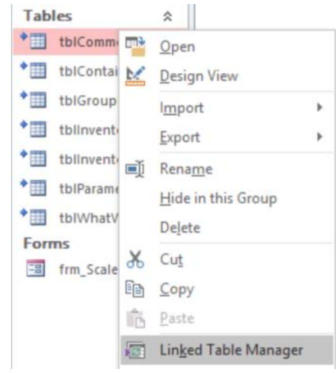


An "advanced" method of getting the software to work is to change the links to the various tables within the GUI database itself.

This is NOT the preferred method.

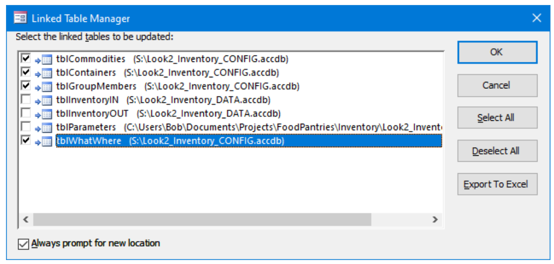
Only do this if you don't want to use the S-drive method.

- Open the GUI database file. As outlined in 3.1 above, it will ask if you wish to re-link it to the local file. Click NO. It should then tell you that Startup has halted. Click OK, and you'll be in the Access database.

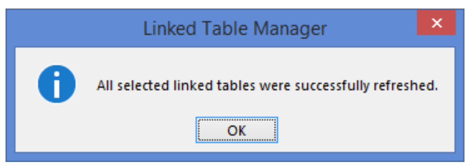


- Right-click on any one of the Tables in the left-hand pane, and choose **Linked Table Manager** from pop-up menu
- **Check the 4** references to tables in the **CONFIG** database

  Make sure the *"Always prompt for new location"* box is checked. NOTE: this looks different for Access365 *(consolidated to only show the 3 backend files)*.



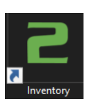
- Click **OK** and browse to the where the database files are stored
- Select the **Look2_Inventory_CONFIG.accdb** file and click **Open**. If you did it correctly, all of the CONFIG references should be re-linked.



- **Repeat** this process for the **DATA** tables (**select just those 2** checkboxes and link them to the **Look2_Inventory_DATA.accdb** file).
- **Close** the table manager and exit Access when done.
- **Repeat** this process to re-link the CONFIG file referenced in the DATA file.

Note: in general, you will not have to re-link the **MYPC** file, as it is intended to be a locally connected file with settings just for that one computer workstation.

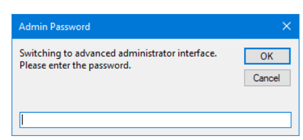
6. Running the Software



6.1. Supplied Examples, Password, Exiting

The initial database comes pre-configured with example carts/containers as well as In Sources and Out Destinations.

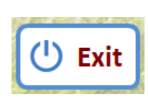
Log in as Administrator *(default password is lowercase a)* to edit these.



There are numerous tutorial videos to help you with this process.

https://www.look2consulting.com/video-tutorials.php

Once logged in as Administrator, you can also shut down of the software via the Exit button.

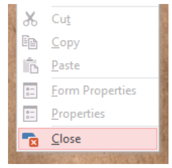


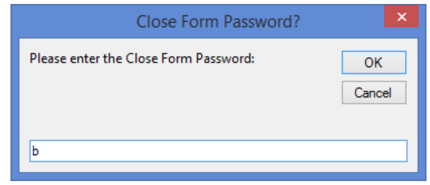
6.2. Gaining access to Access

Should you ever desire to gain access to the tables within the GUI file directly, you will need to close the main form.

To do this, right-click on any part of its background and choose “Close” from the pop-up menu.

It will prompt for a password. By default, the close-form password is the lowercase letter b.





6.3. 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.

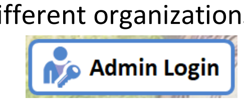
6.4. Windows 11 Users

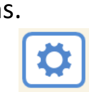
Windows 11 has a known issue whereby shortcuts with .ico files from a mapped drive will appear blank on the desktop. To overcome this issue, simply change the icon to the local Resources directory within the C: drive where the Inventory software is installed.

7. Configuring/Customizing the Software

There are many parameters for customizing the software to help meet the varying needs of different organizations.

Simply click Admin Login button (default password is lowercase a) and click Settings button.





Please refer to the ***Inventory Software Manual*** PDF for help on configuring the system. Also, there are short tutorial videos in the support section of the website: www.look2consulting.com

A quick summary checklist for installation purposes is as follows:

- ☐ Replace the *logo.jpg* file in the Resources subdirectory with yours *(height: 85 pixels … width up to 155 pixels)*
- ☐ Enter your organization name in the Settings screen
- ☐ Set up scale communication parameters, or set to manual mode *(video tutorial available)*
- ☐ Define carts/containers for taring weight *(video tutorial available)*
- ☐ Define IN Sources and OUT Destinations *(video tutorial available)*
- ☐ If using Mealconnect, ask your Food Bank to enable Bulk-Upload, then customize the Commodities to match
- ☐ Determine how you want to back up the data (see full manual for details)

8. Configure Windows

There are numerous settings on the PC which can affect the user experience when using the software. What follows is a brief checklist of some of the items to consider. Not all may be necessary (and yet others may need to be added to the list) ... depending upon your IT policies, etc. Details are not given for each item (this document would be hundreds of pages long!), but rather this serves as a guide to help an IT-savvy person get through a more complete installation.

- ☐ Make sure Windows has all updates applied
- ☐ Make sure Office has all updates applied. Also ensure it is fully licensed (otherwise issues/notices 30 days out)
- ☐ Set Power Options: Sleep = "Never" … especially when DATA/CONFIG are on a network! Optionally set Screen to never turn off as well *(though this is less critical … Screen can be set to 20 minutes if so desired)*
- ☐ Screen Saver Settings – 10 minutes – 3D text to "Tap for Inventory", Wobble
- ☐ Change login on startup to be automatic (WindowsKey+R, netplwiz)
- ☐ Unpin distracting icons from taskbar, also from Start Menu (e.g., games, Netflix, etc.)
- ☐ Taskbar Settings: Auto-hide (so software gets use of full screen resolution)
- ☐ Create shortcuts to files on desktop (Inventory software, excel report template file, reports folder)
- ☐ Display Settings – Notifications & Actions: Turn off Tips/Tricks, Show welcome experience, OneDrive, Suggested
- ☐ File Explorer – turn on view of file extensions
- ☐ Right-click QuickAccess – Options, turn off Show Recently/Frequently used. Pin Inventory folder.
- ☐ Set desktop image to organization's logo (Personalize, make fit=Center, white background)
- ☐ Turn on notifications for Restart (under Windows Update Settings – Restart Options)
- ☐ Uninstall OEM bloatware (e.g., Dell Update Support Assist, Dell Update, or other such stuff)
- ☐ Go to Microsoft Store app and turn off Auto Updates
- ☐ Set Access trusted directory, and also set Excel trust centers
- ☐ Optional: install Chrome, create shortcuts to Look2Consulting.com, Google, and the organization's home page
- ☐ Optional: Download and install Acrobat Reader
- ☐ Optional: In Adobe Preferences-General, uncheck "Show me message when I launch…" and check the "don't show messages while viewing". In Commenting section, disable "Enable text indicators and tooltips". Hide the Tools pane on right (click Tools to toggle). Set Updater section to be "Do not download or install updates automatically"

9. Come Up with Your Plan to Back Up Your Data

The configuration of your system and the data created are all stored in local database files (*DATA, CONFIG, MyPC)*. Come up with your plan on backing these up (either to the Cloud, a backup server, an external drive, etc.). Additional details are covered in the Look2 Inventory Manual.