



# Installation



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Published by: QuickPen® International, Incorporated  
384 Inverness Parkway, Suite 200  
Englewood, Colorado 80112  
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Edition: AllTrak™  
September 12, 2008 Part #AT8065.01.0908\_Installation

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# Installation

This manual contains instructions for installing the AllTrak™ software. It also includes installing scanner software (if you are using this feature) and the preliminary steps required before you start working in the database.

QuickPen recommends that you briefly review all chapters of this manual before you begin the installation process.

The instructions in this manual assume that you already understand Microsoft Windows® operating systems. If this is not the case, QuickPen recommends that you take a workshop. Beginning classes are available in most areas. Ask your computer dealer for suggestions.





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Installation

# Chapter 1 Welcome

## Software Details

This manual includes instructions on installing AllTrak and associated software applications (if you are using these).

After you have completed the steps outlined in this manual, you are ready to begin adding assets to your database. AllTrak includes both online manuals and help that detail the steps required to set up your database.

- *QuickStart Guide* steps you through the implementation process so you can start using AllTrak as soon as possible.
- *Barcodes and Scanners* for those who will use a scanner the application.
- *Introduction Security and Maintenance* manual details how to set up data such as branches, employees, security and categories for your assets.
- *Assets, Service and Administration* manual contains instructions on creating assets and associated service, and also includes information on finding assets in the database.
- *Asset Transactions* manual provides you with step-by-step instructions on check-in/check-out/transfer functions.
- *Reports and Calculations* explains how to produce reports and contains examples of various calculations contained in the application.

Welcome

## Contact us

Please e-mail comments, ideas, and suggestions for improving future documentation by one of the methods below.

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Your comments help us continue to provide accurate and easy-to-understand reference manuals for use with the QuickPen suite of products.

# Installation Procedures

## Contents

"Overview and Requirements"

"Network/Stand-Alone Installation"

"Workstation Installation"

"Adobe Reader"

This Installation section covers installation and initial set up of your AllTrak system. Instructions on installing Adobe Reader are also included. This application is required in order to view the online manuals included with AllTrak.



## Chapter 2 Overview and Requirements

AllTrak can be installed on a network or on a stand-alone, single-user computer. When installed on a network, it runs in a client/server environment.

### *Network*

If you install the software on a network, the database is contained in one location with access granted to various users at certain levels. Network installation also provides a central location for database management, maintenance and backups. After installing on the designated server, you must install the software on each workstation requiring access to the database. The database is most likely backed up daily through system backups by your System Administrator; however, QuickPen recommends that you also perform regular backups of the AllTrak database using the scheduled backup feature. This ensures that your data is safe-guarded.

### *Stand-Alone*

Installing on a single user computer allows access to the database on only that computer. It also provides a central location for the database, but no access from workstation computers. When AllTrak is installed on a stand-alone computer, routine backups of the database should be performed and saved on a network location or other media (for example, CD-RW) to ensure the data is not entirely lost in emergency situations.

### *DataServer*

AllTrak requires installation of DataServer software. The DataServer software is automatically installed when you install the application (either as a network or stand-alone installation). The AllTrak DataServer manages all database information.

This chapter provides you with an overview of the installation process, as well as requirements for installation.

## Preliminary Installation Requirements

- You **must** have administrative privileges in order to install AllTrak.
- Refer to the *AllTrak System Specifications* document for operating system compatibility. You can obtain this document from your sales representative or the QuickPen website: [www.quickpen.com](http://www.quickpen.com).

***Keep in mind that QuickPen Technical Support cannot assist you with hardware configuration issues.*** It is your responsibility to install the software and connect the required hardware. For assistance in such cases, check with the vendor who supplied the equipment, your local computer dealer, the documentation included with your hardware, and/or your company's in-house computer experts.

### Verify TCP/IP

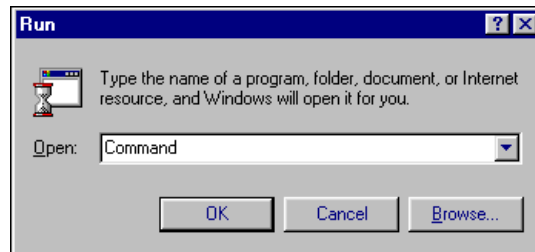


#### CAUTION

AllTrak requires TCP/IP (Transmission Control Protocol/Internet Protocol). Verify that it is installed on your system prior to installing the AllTrak software.

Use the following instructions to verify that TCP/IP is installed on your computer:

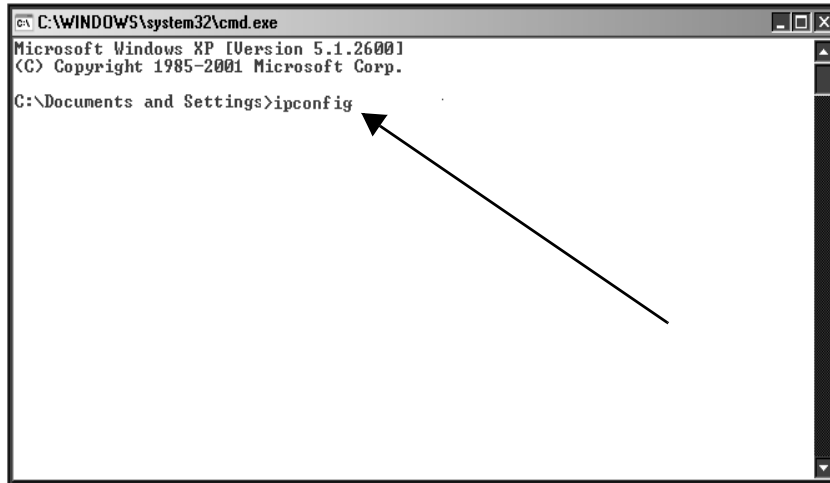
1. From Windows Start menu choose **Run**.
2. In the Run window type **Command**. Click **OK**.



***OR***

For certain versions of Microsoft Windows, you may have to type in **CMD** in the Run window. Choose **OK**.

A window similar to the illustration below displays.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.
C:\Documents and Settings>ipconfig
```

3. At the prompt, type **IPCONFIG**. Press **Enter**. If you have TCP/IP installed, the IP Address for your machine will display.



#### HINT

If the IP Address does not display, or you get an error message, you must install TCP/IP on your computer before you can use AllTrak. Contact your System Administrator for assistance.

4. To close the MS DOS Prompt window type **EXIT** at the prompt and press **Enter** on your keyboard.

### Installation Quick Reference

Quickly locate the installation information you need using the following guide:

Installation Type	Installation Quick Reference
<b>Network/Stand-Alone</b>	See <i>“Network/Stand-Alone Installation” on page 15</i>
<b>Client Workstation</b>	See <i>“Workstation Installation” on page 29</i>
<b>Adobe Reader</b>	See <i>“Adobe Reader” on page 35</i>
<b>Scanners</b>	See the <i>Barcodes and Scanners</i> manual for detailed instructions.

## **Chapter 3 Network/Stand-Alone Installation**

This chapter explains how to install AllTrak software for use on a network or a stand-alone computer. To ensure that your AllTrak application is installed properly, please follow the instructions as outlined in this chapter.

## Considerations

Before you begin, determine the environment in which AllTrak will be used.

### *Network*

If you will be using it on a network, proceed with the instructions outlined on the following pages. After you have completed the installation on the designated server computer, you must *also* install the software on the workstations. These procedures are covered in "*Workstation Installation*" beginning on [page 29](#).

### *Stand-alone*

If you are installing on a stand-alone computer, complete the procedures on the following pages.

## Installation Options

The AllTrak DataServer manages information in the database.

### Network Installation

When you install AllTrak as a network user, the DataServer must be installed on a designated network server. All AllTrak workstations then connect to the DataServer computer. **Note:** See the *Barcodes and Scanners* manual for additional information on using a scanner with a network/workstation installation.

- If you purchased a scanner from QuickPen, this manual is provided to you in a hard copy format.
- You can also access the manual from the installation compact disk.
- After installation, you can open the manual from the Windows Start menu or from within the online help system.

You have the option to install both the AllTrak DataServer and client-side on the designated network server; however, installing the application files (client-side) on the network server is not required. See the following *Reference* table for information on the different installation options available.

### ***Stand-Alone Installation***

When you install as a stand-alone user, you must install *all* components of AllTrak on the computer. You will be given this option in the installation routine.

**Network Installation Reference**

The table below offers information on network installation options. Select the one that works best for your environment.

Type	Advantages	Disadvantages
AllTrak DataServer Installation	<ul style="list-style-type: none"> <li>• All DataServer functionality is available.</li> <li>• AllTrak program files are not installed; therefore, less disk space is required.</li> <li>• Client-side security is not required at the server level.</li> </ul>	<ul style="list-style-type: none"> <li>• You cannot operate the AllTrak programs (client-side) at the DataServer.</li> <li>• You can access the program (client-side) only from workstations.</li> </ul>
AllTrak Stand-Alone Installation on the network server	<ul style="list-style-type: none"> <li>• All DataServer functionality is available.</li> <li>• You can operate the AllTrak program (client-side) on the network computer.</li> <li>• You can access database functions from the server as well as from the workstations where AllTrak is installed.</li> </ul>	<ul style="list-style-type: none"> <li>• Requires additional disk space.</li> <li>• You may not be able to access the database if all available licenses are in use.</li> </ul>

### **Preliminary Steps**

Before you install the software, take the following action:

Close down all Microsoft Windows® based applications on the server, including e-mail software and anti-virus protection software.

### ***Common Installation Commands***

During the installation process, you will see the following in many of the windows:

- To proceed with the installation and advance to the next window, choose **Next**.
- If you want to return to the previous page, choose **Back**.
- If you want to stop the installation, choose **Cancel**. You will be asked to confirm the cancellation. Choose **Yes** if this was your intent. If you pressed the Cancel button in error, choose **No** and the installation will continue.
- **Finish** completes the AllTrak installation.

## Installation Information/Procedures

You must install AllTrak on the stand-alone computer or the computer designated as the server (network installation).

### *Network Users*

Before beginning the installation, you must also know the computer location (for example, the IP Address or server name).

When you install AllTrak on a network server, you have two options:

Install the DataServer only

**OR**

Install a Stand-Alone version on the server

Refer to the "*Network Installation Reference*" table on [page 18](#) for information on the advantages/disadvantages for each of these installation types.



### **HINT**

The network installation must first be performed on the computer designated as the "network" or "database server". This does not have to be the same computer already designated as your current network server. Workstation computers must be able to connect to this computer.

After you have completed the installation on the network server, you must install the AllTrak workstation program on all computers requiring access to the database. The Workstation installation instructions begin on [page 29](#).

### *Stand-Alone Users*

Stand-alone users need only install the software on the designated AllTrak computer.

### Stand-Alone/Network Procedures

To install AllTrak, proceed with the following instructions:

1. Insert the AllTrak compact disk into the CD drive of the stand-alone computer or the computer designated as the server. Wait a moment. The AllTrak installation screen displays.

Depending on your computer settings, the installation may not start automatically. If it does not start a few seconds after you insert the installation compact disk:

- Double-click on the **My Computer** icon.
  - Locate the drive containing the AllTrak installation compact disk.
  - Click on it to display the AllTrak installation screen.
2. Choose **Install: AllTrak**. The InstallShield Wizard prepares to install the software. *Please be patient*. This may take a few minutes.
  3. The Welcome to the Installation Wizard for AllTrak screen displays. Choose **Next**.
  4. The License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.
  5. The Support Service Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the support license agreement**. Click **Next**.



#### HINT

You must accept the terms of each agreement to proceed with the installation. If you want to print the agreements before proceeding, click on the **Print** button.

6. Depending on the type of installation and/or operating system installed on your computer, the Access Control Options screen may display. Choose one of the following options:

**Access is allowed for anyone who uses this computer (all users)**

This allows anyone who logs into your computer (regardless of user name) to access the database. They must, however, have been granted proper security rights in AllTrak.

**Access is allowed only for me** (computer or user name displays)

This allows only the login that matches the computer or user name to access the database.

Choose **Next**.

7. In the Select AllTrak Options screen, choose one of the following radio buttons:

**AllTrak Stand Alone  
(includes both DataServer and Workstation)**

The Stand-Alone option on the network server provides full access to AllTrak (DataServer and client-side of the application) on the server computer.

- **Stand-Alone users** must select this option.
- **Network users**: You can choose *this* option or the DataServer option, depending on your preferences. Refer to the table, [“Network Installation Reference” on page 18](#) for information on the installation options available

**AllTrak DataServer**

***For Network users only:*** You can access only the DataServer on the computer designated as the server when you use this option. The client-side of AllTrak can be accessed only from workstations.

**HINT**

Do not select *AllTrak Workstation* for a network or stand-alone installation. See [page 29](#) for instructions on installing a workstation.

Choose **Next**.

8. The Choose AllTrak Destination Location screen displays. *QuickPen recommends that you install the software in the default location displayed on the screen.* Choose **Next**.
9. Depending on your system and other software programs installed, the Choose ASA Database Server Destination Location screen *may* display. *QuickPen recommends that you install the software in the default location displayed on the screen.* **Note:** If this screen does not display, proceed to *step 10*.  
Choose **Next**.
10. The Select Other Options screen displays. Depending on your preferences, choose or clear the following checkboxes:

**Place the DataServer into the Startup menu**

This selection automatically opens the DataServer when you log into your computer.

**Place an icon onto the desktop for the DataServer program**

Choosing this option allows easy access to the DataServer.

**Place icons onto the desktop for the Workstation programs**

This option will place icons for AllTrak and AllTrak Utilities on the desktop. **Note:** This option does not display if you are installing *only* the DataServer.

11. In the Enter TCP/IP Port screen, enter the **Port** number for the DataServer. QuickPen has provided default values in these fields; however, if you need assistance with the settings on this screen, see your System Administrator. Click **Next**.
12. In the Select Program Folder screen, you can choose how you want AllTrak to appear in your program list. *QuickPen recommends that you accept the default setting.* Click **Next**.
13. Scheduled backups of your AllTrak database can be set up at this time. This allows you to backup your database on a daily basis at a time and location you specify. *QuickPen recommends that you set these parameters during the installation procedure in order to safeguard data entered into the system.*

You can modify settings at a later time in the AllTrak DataServer window. See the online manual *Introduction, Security and Maintenance* manual or the DataServer online help system for more information.

- a. Choose the **Yes** radio button if you want to set the options for Scheduled Backups. Choose **Next**.
- b. Enter the location (drive letter and folder) where you want the backups created.

**OR**

Click on the **Browse** button and navigate to the location and modify the location.



**HINT**

QuickPen recommends that you accept the default backup location. If you want to create the backup in another location, it is recommended that you select a location other than within the AllTrak program (for example, a network location).

Choose **Next**.

- c. In the Scheduled Backup Time window, choose the checkbox next to the time you want the backup to begin. **Note:** The AllTrak DataServer must be open at the time you designate in order to backup your database. For additional information, see the *Introduction, Security and Maintenance* manual.

Choose **Next**.

14. A recap of your selections displays in the Start Copying Files screen. If you are satisfied with the data displayed, choose **Next**. The installation begins. ***Please be patient as this procedure may take a few minutes to complete.***
15. Choose **Finish** to complete the installation.

## **Completion**

Complete the following procedures before you begin working in the database:

### ***DataServer Settings/License Validation***

After installation is complete, you can define additional values and run commands to setup DataServer parameters. See “*DataServer*” on page 42 for information and instructions.

Your AllTrak license validation must be completed within seven days after installation.

Keep the following in mind:

- The temporary license included in the installation can be used during the initial seven days; however, some features of the application will be unavailable.
- After the seven day period, AllTrak will be completely disabled. In order to continue using the application, the license must be validated. See “*License Validation*” on page 55 for more information.

### ***Workstation***

If you installed AllTrak on a network, you must install the application on each workstation requiring access to the AllTrak database. (This is required in order for the workstations to run the software.) See “*Workstation Installation*” on page 29 for instructions.

### ***Start AllTrak***

When the AllTrak installation is complete, refer to “*Preliminary Settings*” on page 41 for instructions on starting AllTrak from the computer designated as the database server or on a stand-alone machine.

### ***Adobe Reader***

In order to view the online manuals, Adobe Reader is required. Refer to page 35 for more information on this free software.

### ***Windows Mobile Devices***

If you purchased a Windows Mobile device for use with AllTrak, refer to the *Barcodes and Scanners* manuals for instructions on configuring the device.

- If you purchased the device from QuickPen, this manual is provided in a hard copy format.
- You can also access this manual from the Windows Start menu or from within the online help system.

Network/Stand-Alone Installation

## Chapter 4 Workstation Installation

If you are installing AllTrak on a network, you must install the workstation at each individual workstation requiring access to the database. This step activates the software on each workstation so it can communicate with the AllTrak DataServer.

Before you begin workstation installations, please complete the installation of AllTrak on the designated server computer.

## Preliminary Steps

Before you install the software, take the following actions:

Close down all Microsoft Windows® based applications on the workstation computer, including e-mail software and anti-virus protection software.

### *Common Installation Commands*

During the installation process, you will see the following in many of the windows:

- To proceed with the installation and advance to the next window, choose **Next**.
- If you want to return to the previous page, choose **Back**.
- If you want to stop the installation, choose **Cancel**. You will be asked to confirm the cancellation. Choose **Yes** if this was your intent. If you pressed the **Cancel** button in error, choose **No** and the installation will continue.
- **Finish** completes the installation.

### *IP Address*

During the Workstation installation you must enter the TCP/IP address and Port number to access the computer where the DataServer is installed. Refer to [“Verify TCP/IP” on page 12](#) for instructions on how to obtain this information at the AllTrak DataServer computer. You should have this information available before you begin the installation process.

## Installation Procedures

1. Insert the AllTrak compact disc into the CD drive of the workstation computer. Wait a moment. The AllTrak installation screen displays.  
Depending on your computer settings, the installation may not start automatically. If it does not start a few seconds after you insert the installation compact disk:
  - Double-click on the **My Computer** icon.
  - Locate the drive containing the AllTrak installation compact disk.
  - Click on it to display the AllTrak installation window.
2. Choose **Install: AllTrak**. The InstallShield Wizard prepares to install the software. *Please be patient*. This may take a few minutes.
3. The Welcome to the Installation Wizard for AllTrak screen displays. Choose **Next**.
4. The License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.
5. The Support Service Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the support license agreement**. Click **Next**.



### HINT

You must accept the terms of each agreement to proceed with the installation. If you want to print the agreements before proceeding, click on the **Print** button.

6. Depending on the operating system installed on your computer, the Access Control Options screen may display. Choose one of the following options:

**Access is allowed for anyone who uses this computer (all users)**

This allows anyone who logs into your computer (regardless of user name) to access the database. They must, however, have been granted proper security rights in AllTrak.

**Access is allowed only by me** (computer or user name displays)

This allows only the login that matches the computer or user name to access the database.

Choose **Next**.

7. In the Select AllTrak Options screen, choose **AllTrak Workstation**. Click **Next**.
8. The Choose AllTrak Destination Location screen displays. *QuickPen recommends that you install the software in the default location displayed on the screen.* Choose **Next**.
9. The Select Other Options screen displays. Choose the **Place icons onto the desktop for the Workstation programs**. This option will place icons for the client side of AllTrak on the desktop for easy access. Choose **Next**.
10. The **TCP/IP** (*Internet Protocol Address*) connects the workstation to the computer where the DataServer is installed. The **Port** identifies how to access the DataServer software on the network computer.  
In the Enter TCP/IP and Port screen, enter the following information:

**TCP/IP**

This is the address of the computer where the DataServer is installed. If you are unsure of the address, refer to the instructions on [page 12](#) or talk with your System Administrator.



**CAUTION**

This field contains a default to the Stand-Alone IP address. To provide connectivity to the DataServer, you **must** enter the appropriate IP address for the server!

**Port**

Enter the Port number you will use to access the AllTrak DataServer. If you need assistance with this setting, see your System Administrator.

Choose **Next**.

11. In the Select Program Folder screen, you can choose how you want AllTrak to appear in your program list. *QuickPen recommends that you accept the default setting.* Choose **Next**.
12. A recap of your selections displays in the Start Copying Files screen. If you are satisfied with the data displayed, choose **Next**. The installation begins. *Please be patient as this procedure may take a few minutes to complete.*
13. Choose **Finish** to complete the installation.

### **Workstation Completion**

If this is the first time you have installed AllTrak, complete the following procedures before you begin working in the database:

#### ***Start AllTrak***

When the AllTrak installation is complete, refer to [“Preliminary Settings” on page 41](#) for instructions on starting AllTrak from the computer designated as the database server or on a stand-alone machine.

#### ***Adobe Reader***

In order to view the online manuals, Adobe Reader is required. Refer to [page 35](#) for more information on this free software.

#### ***Windows Mobile Devices***

If you purchased a Windows Mobile device for use with AllTrak, refer to the *Barcodes and Scanners* manuals for instructions on configuring the device.

- If you purchased the device from QuickPen, this manual is provided in a hard copy format.
- You can also access this manual from the Windows Start menu or from within the online help system.

## Chapter 5 Adobe Reader

AllTrak includes online manuals. These manuals are in a portable document format (PDF) format. Direct access hyperlinks throughout the manuals provide easy access to various topics. You can also print all or part of any AllTrak online manual.



### HINT

If Adobe Reader is already installed on the workstation, it must be at least version 5 to open and view the AllTrak manuals on-screen.

***QuickPen recommends that you install the most current version of the reader available.***

## Adobe Reader Information

To verify that you have Adobe Reader Version 6 or greater installed on your computer, do the following:

1. Open Adobe Reader. Choose the **Help** menu and then select the **About** command. (*Note:* Depending on the version of the Reader you have installed, the command may read **Adobe Acrobat Reader** or **Adobe Reader**.)
2. In the product information window verify that the version is 6 or greater.
  - If it is, no further action is necessary. *However, it is recommended that you install a current version of the reader.*
  - If not, you must install Adobe Reader.

### ***Installation Requirements***

- If you have installed AllTrak on a network with workstations, you must install Adobe Reader on each workstation. This provides access to the manuals for all using AllTrak.
- If you have installed AllTrak on a stand-alone computer, you must install Adobe Reader on the stand-alone computer.

## Install Adobe Reader

To install a free copy of Adobe Reader:

1. Insert the AllTrak installation compact disc into the CD drive of the stand-alone or workstation computer. Wait a moment. The AllTrak installation window displays.
2. Choose **Install: Adobe Reader**.



### HINT

This option displays on the installation screen **ONLY** if Adobe Reader is not currently installed on your system.

3. The Reader Setup window displays. Read the information contained in the window. Choose the **Next** button to proceed with the installation.  
  
If you have an older version of Reader, you may receive a message indicating that the older version must be removed prior to installing the new version. If you receive this message, proceed with the removal process. Once removal is complete, go back to *Step 1* and begin the installation again.
4. Follow the remaining on-screen instructions. *It is always recommended that the default installation locations be accepted.* Follow the on-screen instructions provided by Adobe to download the software.

For additional information, or to download Adobe Reader, visit the Adobe website at <http://www.adobe.com>.

Adobe Reader

# Getting Started

Contents

"Preliminary Settings"

"Online Documentation"

The Getting Started section provides information on preliminary settings for the AllTrak DataServer, initial AllTrak access, and using the AllTrak online documentation.



## Chapter 6 Preliminary Settings

### Main Ideas

When you complete the installation of the AllTrak software, you are ready to create the backup settings in the DataServer. For security purposes, you should also change initial passwords and create a new System Administrator for the AllTrak client (stand-alone or workstation).

Before proceeding with the directions contained in this chapter, make sure you have completed the installation steps outlined in *“Network/Stand-Alone Installation” on page 15* and, if necessary, *“Workstation Installation” on page 29*.

This chapter provides you with preliminary instructions on procedures that should be completed immediately after the installation is complete.

## DataServer

### Open DataServer

Depending on your settings, the DataServer may open automatically when you start your computer. In most cases, it will also start automatically when you open the client-side of AllTrak. In each of these cases, the DataServer is minimized and available in the Windows System Tray. See [“Minimized DataServer” on page 43](#) for instructions.

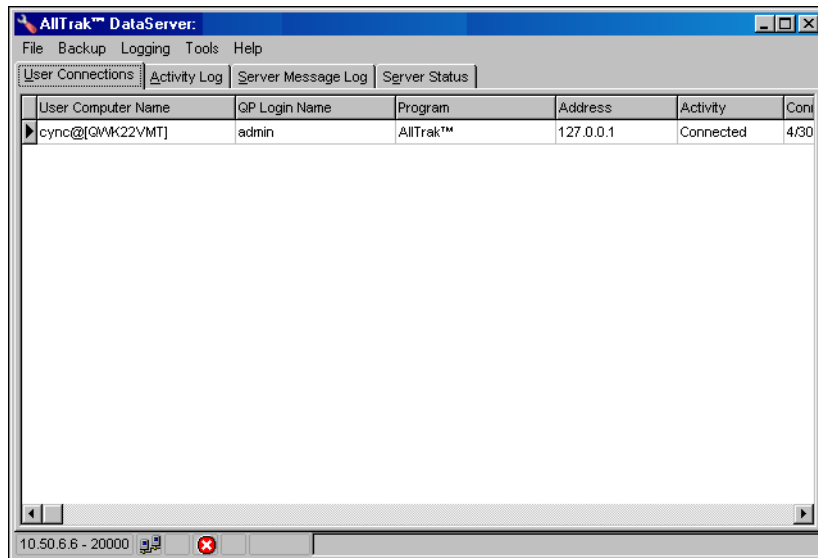


Double-click on the AllTrak DataServer icon on your desktop.

**OR**

From the Windows Start menu, choose **Programs > AllTrak > AllTrak DataServer**.

The AllTrak DataServer window opens.



### Minimized DataServer

If the AllTrak DataServer is minimized in the Windows System Tray, double-click on it and the window opens.



### Minimize DataServer

When you are done working in the AllTrak DataServer window, you can minimize it using one of the following methods:

In the upper right corner of the window,

Click on the  button.

**OR**

Click on the  button.

### Close DataServer

To close the AllTrak DataServer, choose **File > Exit**. **Note:** If users are connected to the DataServer when you close it, everyone will be automatically disconnected. You can use the **Tools > Messaging** or **File > Timed Shutdown** commands to send a message advising everyone to log out.

## Backup Settings

With any software package, periodic backups of your data should be performed. This provides you with a safeguard against data loss in your AllTrak system.



### CAUTION

You must complete the procedures outlined in order to produce accurate and timely backups of your database. Failure to complete these procedures may result in improper creation of system backups.

The procedures covered in this topic detail only setting the backup parameters. For detailed instructions on creating backups and/or restoring data, see the *Maintenance* section in the *Introduction, Security and Maintenance* manual.

## Backup Login

To perform many of the Backup and Restore functions, you are required to login to the database. This feature provides additional security for database protection.



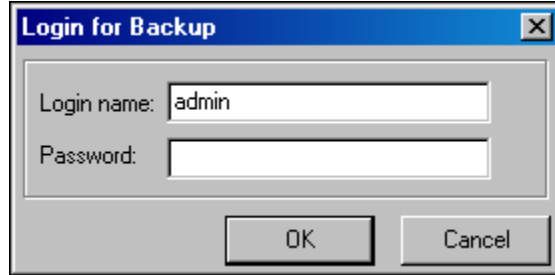
### HINT

Initial login and password is included on the last page of this manual.

You must have proper access rights to perform backups.

Preliminary Settings

1. In the AllTrak DataServer window, choose **Backup** and the command you want to perform. You will be required to login. The following is an example of the Login for Backup window. Other login windows are similar in content and appearance.



Complete the following fields:

**Login name**

Enter your login name in the Login name field. *Note:* In some cases, your Windows system login name may display in the field. Highlight the entire text and type the appropriate password in the field.

**Password**

Enter the **Password** required to access backups. (See the last page of this manual for password information.)

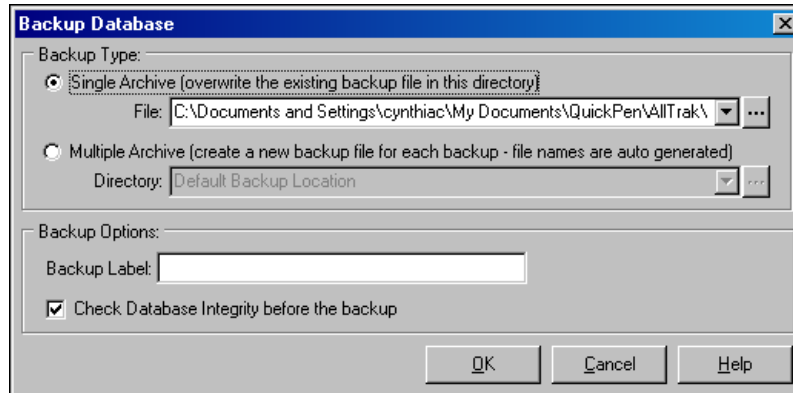
2. Choose **OK**

The window associated with the command selected opens.

### Client Requested Options

Default backup options are set in the AllTrak DataServer. This procedure allows you to modify the default settings based on your company policy.

1. In the AllTrak DataServer window, choose **Backup > Client Backup Options**.
2. Login according to the instructions on [page 45](#).  
The Set Options for Client Backup Requests window opens.



3. Choose and complete data for one of the following options:

#### **Single Archive**

The **Single Archive** radio button overwrites the previous backup file. Choosing this option requires less attention to disk space maintenance; however, it does not preserve previous periodic backup files.

When you choose the Single Archive option, you must also enter a location (Drive and Folder) and file name in the File field. The file name selected is the name of your single archive file each time a backup is created. For example, you might want to use ***TM Full Backup*** as the backup file name. All backup files created will be called **TM Full Backup.QPB**.

#### **Multiple Archive**

The **Multiple Archive** radio button creates a separate file each time a backup is created. This option preserves all previous backup files.


When you choose the Multiple Archive option, you must also specify the **Directory** (folder) where you want the backups created. The file name is generated automatically by AllTrak in the following format ***YYYY-MM-DD HHMM.SS.QPB***. For example, a backup file created on August 28, 2005 at 11:15.25AM will be called **2005-08-28 1115.25.QPB**.

Because a separate file is created each time, maintenance is required to avoid disk space problems. If not done so already, you should develop a policy for retaining older backup files of your AllTrak system.



#### **HINT**

QuickPen recommends that you save your backup to a location outside of the AllTrak program files on your computer; for example, a network drive.

4. If desired, choose the **Check Database Integrity before the backup** checkbox to locate and correct errors. Checking the database integrity locates errors and broken links and automatically corrects them.
5. Choose **OK**.
6. When you are done working in the AllTrak DataServer, click on the  in the upper right-corner.  
**OR**  
If you want to close the AllTrak DataServer, choose **File > Exit**.

The defaults are now set and will be used for future client requested backups. You have the option of overwriting these defaults when you perform backups from the AllTrak DataServer; however, backups performed from the client-side of AllTrak are created based on the settings selected in Client Backup Options.

### Scheduled Database Backups

AllTrak includes the option of creating regularly scheduled backups, which occur daily at the time you specify. This option protects your data with no required action on your part. Other options can be scheduled at the same time scheduled backups are performed.

Scheduled backups are not automatically saved from day-to-day. Each backup performed overwrites the backup from the previous day. Contact your System Administrator for information on how your company-wide system backups are handled.



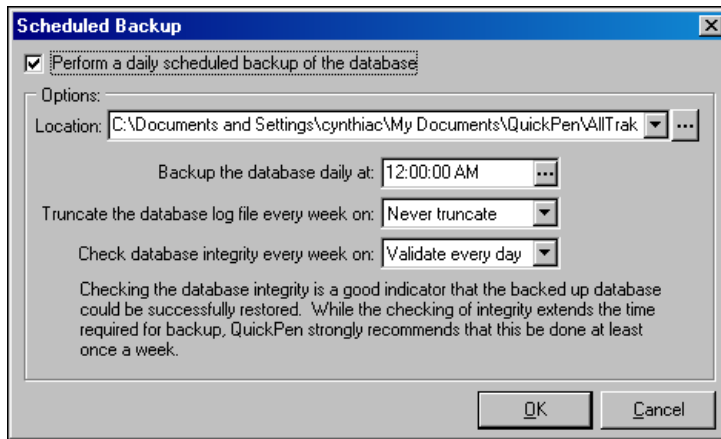
#### HINT

The AllTrak DataServer must be running to produce a scheduled backup. If the DataServer is closed, a backup cannot be created.

Parameters for daily backups *may* have been set during the installation process. If these were not set or you want to modify these parameters, complete the following steps.

1. In the AllTrak DataServer window, choose **Backup > Scheduled Backup Options**.

2. Login according to the instructions on [page 45](#).  
The Scheduled Backup window opens.




3. Select the **Perform a daily scheduled backup of the database** checkbox.
4. Complete the following information in the Options pane:

**Location**

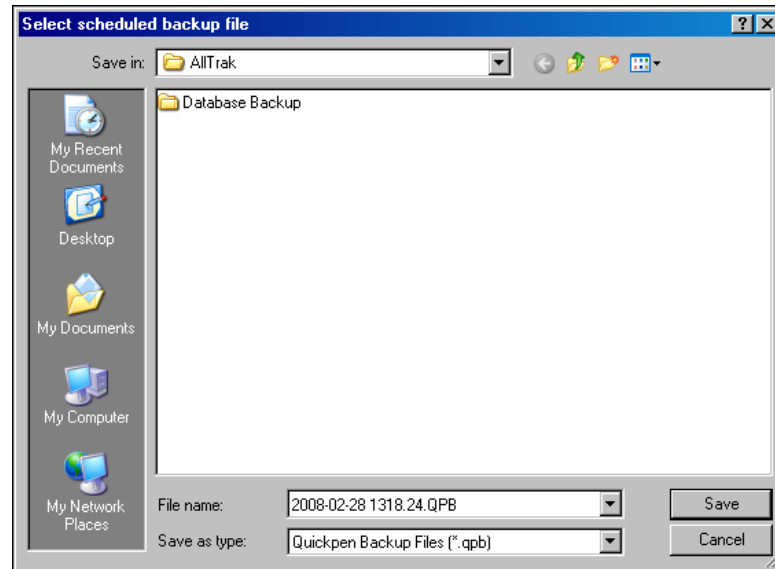
Enter the Location (Drive letter, folder and file name) where you want the scheduled backup created. You can select Default Backup Location from the picklist if you desire.

**OR**

Choose the ellipsis button  to browse to the location of your choice.

## Preliminary Settings

The Select scheduled backup up file displays.



Browse to the desired backup location.

Enter the desired backup file name.

Choose **Save**.

*QuickPen recommends that you select a location other than the hard drive where your AllTrak system is installed.*

**Backup the database daily:**



**HINT**

**Network users:** Make sure you allow enough time for your daily backup to *complete* before your server system backup begins. Because the DataServer must remain open for a scheduled backup, none of the AllTrak files will be included in your server backup. The scheduled backup file will be included if you are creating the file on your network server, provided it is completed!

See your System Administrator for more information.

Click on the ellipsis button and select the time you want the scheduled backup created.

***OR***

This data can be entered in the follow format: **HH:MM:SS AM** or **HH:MM:SS PM**.

You might want to choose a time when no one is working in AllTrak. While the backup will still be created, it will slow processing for other users working in the application.

### **Truncate the database log file every week on**

Choose an option from the picklist. The AllTrak DataServer saves all transactions made in the database. The information is stored in the database log file. After extensive use of the database, the size of this file may become unmanageable. The truncate feature will reduce the size of the file on a weekly basis.



#### **CAUTION**

The database log file is included in all full backups. QuickPen recommends that you truncate the database logs on a weekly basis *only* if you have performed periodic full backups.

### **Check the database integrity every week on**

Checking the database integrity locates errors and broken links and automatically corrects them. *Note:* This feature does not look at individual projects.

If you want to check the integrity of the database before creating a back up, select the **Check Database Integrity before the backup** checkbox in the appropriate window.



#### **CAUTION**

*QuickPen recommends that you check database integrity on a regular basis.* Keep in mind that the integrity check may take several hours (depending on the size of your database). It is advisable to only perform this function during a time when no one will be using AllTrak.

5. Choose **OK**. The backup will be created at the time you specify. Be sure to leave the AllTrak DataServer open or the backup cannot be created.

## Access/Final Steps

### License Validation

You must validate the AllTrak license data within seven days of installation. Although you are able to do some work in the database, certain application modules are not available with a temporary license. After the seven day grace period, you will be unable to use AllTrak until this license validation occurs.

In order to validate your license, contact QuickPen AllTrak Technical Support at (800)441-2840, Monday through Friday, 8:30AM-5:00PM ET.

### Additional Information

Before the AllTrak can be opened, the DataServer must be open and running.

- If you are using the application on a stand-alone computer, the DataServer automatically opens when you start AllTrak.
- If you are using the application on a network, make sure the DataServer is open and running on the computer designated as the server.

### *Automatic Update Checking*

The first time you open the AllTrak, you may receive a message screen relating to checking for available updates.

- If you have access to the Internet on this computer, choose **Yes** in this confirmation screen if you want to periodically check for updates.
- If you do not have access to the Internet on this computer, choose **No** in this screen.



### CAUTION

If you do not have access to the Internet, choosing Yes will cause your system to run *extremely* slow.

## Preliminary Settings

You can always set this up at a later time under Personal Settings. See the *Introduction, Security and Maintenance* manual for instructions.

### Open AllTrak



AllTrak

1. Double-click on the AllTrak icon on your Windows desktop.  
**OR**  
Choose the Windows **Start** menu. Choose **Programs > AllTrak > AllTrak**.
2. The AllTrak Login window displays.



Complete the following fields:

#### Login name

Enter **admin** in the Login name field.



**HINT**

Your Windows login name may display in the Login name field. With your mouse, highlight the entire field and type in the Login name specified in this step.

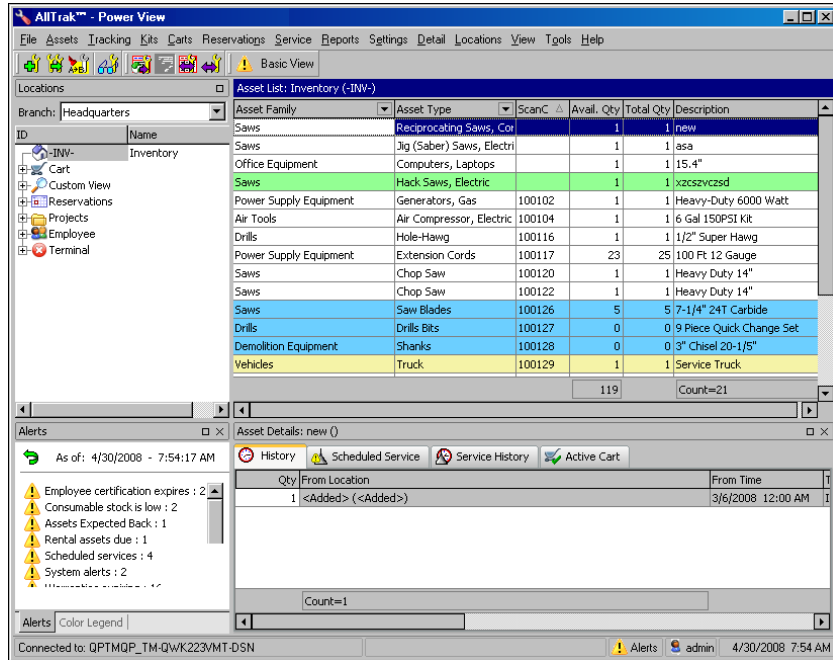
**Password**

Enter the **Password** to access the AllTrak. The password is provided in the back of this manual.

3. To save the data on this window for future sessions, choose the **Save Password** checkbox. This saves the password in the field so you do not have to re-enter.

Preliminary Settings

4. Choose **OK**. The main AllTrak window opens.



**Note:** If you are starting AllTrak for the very first time and you are not importing data from a previous version, your screen will look similar to the above illustration; however, the database will not include asset or location information.

## Passwords and Rights

A default user and password have been included in the application. This default has system administrator rights, which means that anyone logging in using this default has access to all areas of AllTrak. AllTrak contains security that allows each employee access to only those areas required. For more information on access rights, see the *Employees and Security* section in the *Introduction, Security and Maintenance* manual.

You can continue using the defaults as shipped, but to safeguard your data, ***QuickPen recommends that you change the password immediately.*** We also recommend that you create a system administrator in the database that is specific to your company.

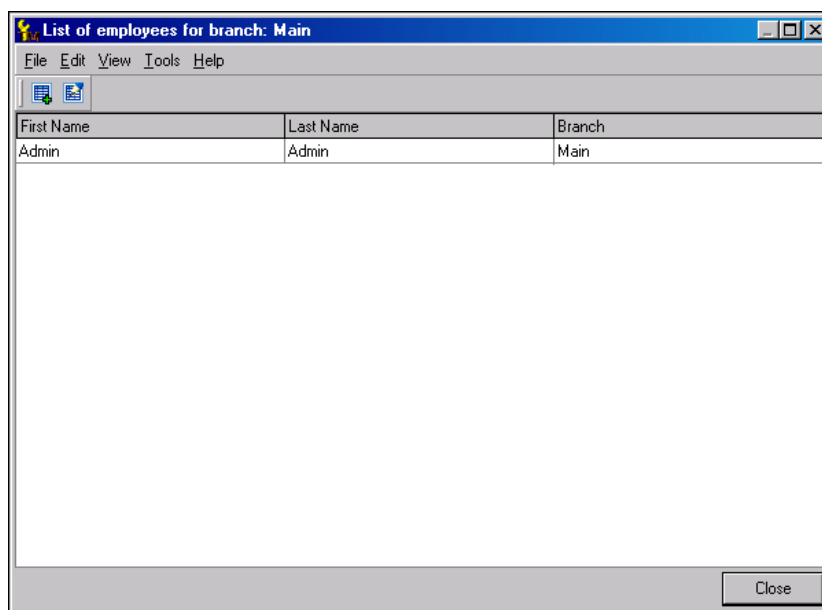
See the following topics for instructions on changing passwords and adding a system administrator:

- [“Change Initial Password” on page 60](#)
- [“Create Administrator” on page 63](#)

### ***Change Initial Password***

The initial access password provided allows access to all areas of Tool Manager AllTrak. To protect your data, QuickPen suggests that you change this password immediately.

1. In the main AllTrak window, choose **Settings > Employees**. The List of employees window displays.



2. Click one time on **Admin** and proceed as follows:  
Choose **Edit > Edit Employee**.  
**OR**  
Right-click and choose **Edit Employee** from the pop-up menu.

**OR**

Double-click on **Admin**. The Employee: Admin Admin window opens.

**HINT**

If you are using a Proximity Card and Security Reader, scan the card for this employee while on this tab. This information will automatically populate the Security ID field, linking the card codes to this employee.

- a. Click on the **Security** tab.
- b. Click in the **Password** field. Highlight the entire field and enter the new password.
- c. Choose **OK**.

*Be sure to make note of the new password.*

#### Preliminary Settings

3. After you have modified the default password, QuickPen recommends that you close AllTrak completely (including the AllTrak DataServer). This allows the DataServer to recognize the new password.



#### **HINT**

You must use the new password to access AllTrak when you reopen the application.

To continue with the remaining procedures, reopen AllTrak and the AllTrak DataServer.

### **Create Administrator**

QuickPen recommends that at least one AllTrak administrator be added at this time. The system administrator should be the primary person(s) responsible for maintaining the AllTrak database. To add an employee administrator to the AllTrak database, proceed as directed below:

1. In the main AllTrak window, choose **Settings > Employee List**. The List of employees window displays.



In the List of employees window, proceed as follows to add an administrator to the AllTrak database.

Click on the  on the toolbar.

**OR**

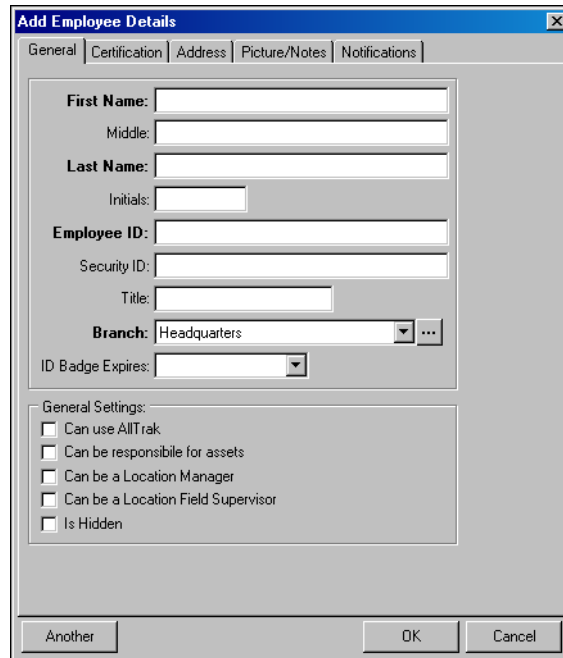
Choose **Edit > Add Employee**.

**OR**

Press the **Ctrl+Insert** key on your keyboard.

## Preliminary Settings

The Add Employee Details window opens.



The tabs available are determined by the choices made in the General Settings pane.



### HINT

All fields that display in **bold** are *required*.

### *General Tab*

1. Enter the following applicable information in the fields provided:

- **First Name**
- **Middle**

- **Last Name**
  - **Initials**  
If applicable, this field can also be used for nicknames.
  - **Employee ID Security ID**  
This field is required if you are using a Proximity Access/Security Card to login to AllTrak or when performing asset transactions. Place the cursor in this field and scan the security card. This associates the employee with the card identification. *Note the following:*
    - The access code displays in the field with asterisks. This ID *must* match the ID/Login scanned on the AllTrak Login screen or when performing asset transactions.
    - Access codes must be unique for *each* employee.
  - **Title**
2. Choose **Main** from the **Branch** picklist. You can change this assignment later if necessary.
  3. If you are producing *Employee ID Badges* from AllTrak (as defined in the Reports module) and you want to monitor dates, you can enter a value in the **ID Badge Expires** field in an **MM/DD/YYYY** format.  
**OR**  
You can click on the  to select a date from the system calendar.
  4. In the **General Settings** pane, choose the following applicable checkboxes:
    - Can use AllTrak**  
In order to access this option, you must have System Administrator capabilities. This setting allows the employee to work in the AllTrak database. When this option is selected, you must also set *Security* and *Access* rights. See "*Security Tab*" on page 66 for further instructions.
    - Can be responsible for assets**  
When this option is selected, the employee is allowed to have asset responsibility in transactions. At the time an asset transaction is

Preliminary Settings

performed, only those employees who have this option selected can be responsible for the asset.

5. Click on the **Security** tab to continue setting up this employee.

**Security Tab**



**HINT**

The Security tab is visible only when the **Can use AllTrak** option is selected on the General tab.

Login name, Password and Access Rights for the employee are set on this tab.

A screenshot of a software dialog box titled "Add Employee Details". The dialog has several tabs: "General", "Security", "Access", "Certification", "Address", "Picture/Notes", and "Notifications". The "Security" tab is currently selected. It contains two text input fields: "Login Name:" and "Password:". Below these is a section titled "Access Rights:" containing a list of 18 options, each with an unchecked checkbox. The options are: System Administrator, Can transfer assets, Can add assets, Can edit assets, Can delete assets, Can backup/restore data, Can print reports/validate assets, Can add/edit/delete reports, Can edit asset history, Can delete transactions originated by the employee, Can add/hide locations, Can edit locations, Can add/edit/delete employees, Can add/edit/delete other companies, Can add/edit/delete service items, Can access ALL branches, Can access ALL asset families, and Can access (not edit) assets from all branches. At the bottom of the "Access Rights" section are two buttons: "Clear All Options" and "Set All Options On". At the very bottom of the dialog are three buttons: "Another", "OK", and "Cancel".

1. Enter the employee's **Login name**. The field is required in combination with the Password when the employee opens AllTrak.
2. Enter a **Password** for the employee. The field is required in combination with the Login name when the employee opens AllTrak.
3. In the Access Rights pane, choose the **System Administrator** checkbox. When you select this option, the employee can perform all functions in AllTrak. *QuickPen recommends that you limit the number of employees assigned System Administrator rights.* This provides better protection of the AllTrak data. If you select this option for the employee, all required data is complete on this tab.

## Preliminary Settings

## Chapter 7 Online Documentation

Obtaining information is important when you are working in any software package. AllTrak provides online documentation that can be accessed directly from within the software.

This chapter explains the organization and content of the documentation. Directions are included for opening each type.

## Main Ideas

### Documentation Description

The AllTrak documentation set is organized by topic into the following categories:

- ***AllTrak online help***  
Online help is provided for quick and easy access to provide answers to your questions. You can press **F1** in any window within AllTrak and the corresponding topic displays.
- ***AllTrak DataServer online help***  
Online help is also available from within the DataServer.
- ***Master Table of Contents***  
This document provides you with a quick way to find the information you need. Click on a topic in the Master Table of Contents and the manual containing that topic automatically opens to the section and chapter. Use the bookmarks on the left side to locate the information you require.
- ***Installation***  
Contains information on installing AllTrak and initial access to the database. A hard copy of this manual is also provided.
- ***Barcodes and Scanners***  
Installing the required software, as well as configuring your scanner, is covered in this manual. A hard copy of the manual is provided only if you have purchased a scanner from QuickPen.
- ***QuickStart Guide***  
This guide covers some of the basics in setting up your database. QuickPen recommends that you review this manual and use the tips included to help you get up and running in the quickest timeframe.
- ***Introduction, Security and Maintenance***  
An introduction to the software is included in this manual. Detailed information on how to use help and online manuals, setting up database security, and the backup/restore functions is also included.

- ***Assets, Service and Administration***  
Step-by-step instructions on adding assets, performing lookups and adding service data to your database are included in this manual.
- ***Asset Transactions***  
This manual provides information on moving assets from one location (job or branch). Using scanning devices to perform these tasks is also covered.
- ***Reports and Calculations***  
Information on producing various reports and how charges are calculated can be found in this manual.
- ***Professional Printing***  
This document contains Instructions and permissions to print manuals.

## Online Manuals

You can access all manuals online from the Help menu in the software. The manual can be viewed on the screen. In doing so, you can take advantage of the hyperlinks. Hyperlinks display on your screen in *blue italics*. Clicking on *hyperlinks* will take you directly to that information.

If you prefer to have a hardcopy of the manual, you can print the manuals. See the *Professional Printing* document for information.

The manuals are automatically installed with your AllTrak software. If you are reading this from the hard copy manual we sent you, follow the instructions below to open one of the online manuals.

### Manuals From Help Menu

Accessing online help is done from the AllTrak menu.

1. Choose **Help > AllTrak Manuals**.  
A sub-menu opens.
2. Click on the manual you want to open.

### **Manuals From Start Menu**

To open the online manuals from the Start menu, perform the following steps:

1. From your Windows desktop, choose the **Start** button on the Windows taskbar.
2. Choose **Programs > AllTrak > Documentation**.
3. Click on the manual you want to open.

## Manual Layout

Each manual is organized into sections. The sections contain chapters related to the section topic. Where applicable, each chapter follows the same organizational structure to help you easily find information. This structure accommodates individuals who want only a brief overview of the information before they begin working, as well as users who prefer step-by-step instructions with full explanations.

For example, the organization of a chapter is shown below:

### **What you will learn**

This lists main topics covered in the chapter.

### **Before you begin**

This explains what you should know before beginning the chapter.

### **Reference**

This provides you with a list of benefits of using and drawbacks for not using the functionality (not included in all chapters).

### **Main ideas**

This contains overview and conceptual information you need before beginning a task.

### **Quick steps**

These include abbreviated steps for tasks in this chapter. You can photocopy these pages for quick reference.

### **Detailed Directions**

These provide step-by-step instructions for tasks in the chapter.

### Helpful hints

The manuals are designed for ease of use. You may encounter a **Caution** or a **Hint** message as the following graphics indicate:



#### **CAUTION**

A Caution lets you know what can go wrong if you do not follow instructions carefully at this point.



#### **HINT**

A Hint is a tip for using AllTrak more effectively.

## Find Information

There are several methods when using the manual online to find information.

- Check the *index* for each manual. The topic you want is probably there. If you are unable to locate the topic, try thinking of the topic a little differently. For instance, you might try looking for the word *Delete* instead of the word *Remove*.
- Scan the *Table of Contents* for each manual. Look for the topic you need. The contents are logically arranged for proper use of AllTrak.



### HINT

Tables of Contents and Indexes are linked to each chapter or topic. Click on the item in the Table of Contents or Index and the online manual automatically moves to the page for that topic

When you open the manual, the Adobe Reader window displays.

- Check the index for each manual. The topic you want is probably there. If you are unable to locate the topic, try thinking of the topic a little differently. For instance, you might try looking for the word *Deleting* instead of the word *Removing*.
- Scan the *Table of Contents* for each manual. Look for the topic you need. The contents are logically arranged for proper use of AllTrak.



### HINT

Tables of Contents and Indexes are linked to each chapter or topic. Click on the item in the Table of Contents or Index and the online manual automatically moves to the page for that topic.

- The chapter and title is listed on the upper corner on each the page. The name of the manual is listed in the lower left corner on each page.

#### Online Documentation

- The Navigation Pane is located in the lower side of the window. The Navigation Pane displays section, chapter and topic information.

The online manual contains blue references (*hyperlinks*). Clicking on a hyperlink will immediately take you to the page or topic referenced. Using hyperlinks allows you to navigate quickly through the manuals to find specific information.

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## Initial Password

**admin**

*QuickPen recommends you change the initial password as soon as possible after installation.  
Doing so will prevent access to the database by unauthorized individuals.*

