OverDrive™ 1st

Vehicle Scale Software

User's Manual

Software Version 2.0.0

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INTRODUCTION

Information about METTLER TOLEDO Technical Training for North America can be obtained by writing, calling, or faxing:

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CONTENTS

1 Introduction

General

OverDrive™ 1st Vehicle Scale software is designed to control transactions in which material is bought, sold, or processed on a scale. It enables you to store a detailed record of each transaction, to print tickets and reports, and to export data for use with other software packages.

OverDrive 1st software can connect to as many as six scales and to peripheral devices such as traffic lights and gates.

Capabilities

OverDrive 1st Software Package

- Control of one scale plus manual weight entry
- Sybase® Adaptive Server Anywhere database
- Transaction screen
- Database tables for Account, Carrier, Company, Container, Contract, Driver, Permit, Product, Surcharge, Tax, Trailer, Vehicle, and four additional tables
- Presets
- Security setup for assigning passwords
- Transaction maintenance
- Weights and Measures log
- Standard reports and tickets
- Wizards for data conversion and database import/export
- English language only

Optional Add-On Modules

Additional Scale Module

- Enables software to control as many as six scales

Additional Database User Licenses

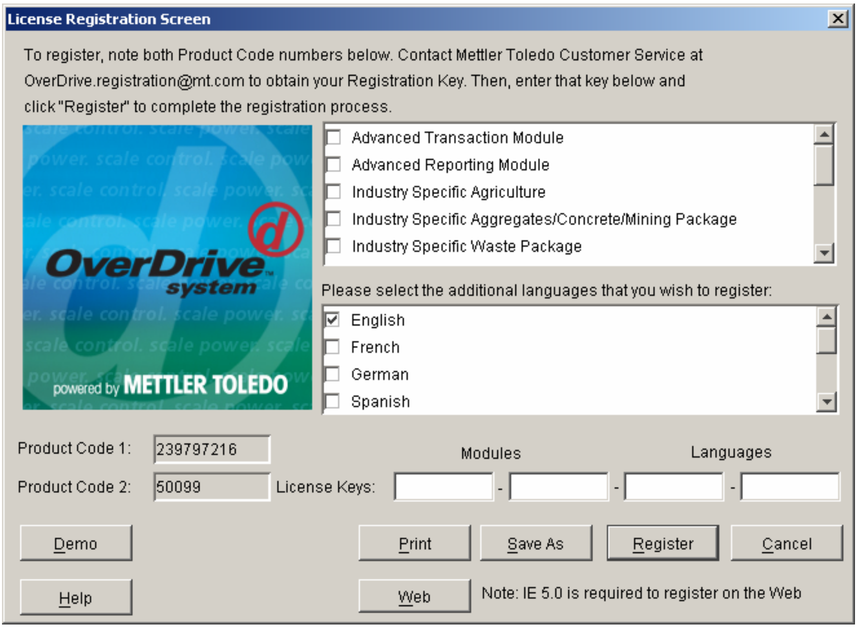
- Database licenses are available to (1) enable access to specific users or (2) enable access to many users but limit the number who can be logged in simultaneously

2 License Registration

Registering

After you have installed the OverDrive software, you will need to register before you can use it. If you do not register, the program can be opened only in demonstration mode. This mode gives you access to all functions, but it cannot be used to process real transactions because it enters random weights.

Register your installation from the **License Registration Screen**. To open the screen, click the OverDrive icon in the **Start / Programs / Mettler Toledo** menu.



1. Click the **Save As** button to create an electronic copy of your registration form. The form will list your product codes.
   - When the **Select File** window opens, select a storage location in the **Look In** combo box.
   - Enter a file name (in *.txt format) in the **File Name** data field.

- Click the **Save** button on the window.

2. E-mail your registration form (in *.txt format) to the E-mail address listed at the top of the **License Registration Screen**. If you have purchased the additional scale module, be sure to specify how many scales you are connecting to when you register the software.
3. Mettler Toledo will send you license keys for the modules. Enter those keys in the appropriate **License Keys** data fields on the **License Registration Screen**.
4. Click the **Register** button. You will then be prompted to restart the application in order to complete the registration process.

After you have registered your software, the **License Registration Screen** will no longer open automatically when you log in to the system. If you install an add-on module later, you will need to register the software again. To display the **License Registration Screen**, start the program and select **Register** in the **Help** menu.

License Registration Screen

Product Codes

The product codes listed in the two data fields on the **License Registration Screen** are for the computer on which the software is installed. The license keys that you receive will be linked to those product codes. To register a system, you must enter the license keys that are linked to the product codes shown on the screen.

License Keys

There are four **License Keys** data fields, two for modules and two for languages. When you receive your license keys, enter them in the **Modules** data fields in order to register your system. Do not enter license keys in the **Languages** data fields.

Push Buttons

Demo: Click the **Demo** button to start the OverDrive program in demonstration mode. Demo mode allows you to try out the software, giving you access to all functions. However, you will not be able to use it to process real transactions because the program enters random weights when it is run in demo mode. NOTE: The Sybase database must be open before you can start the OverDrive program.

Help: Click the **Help** button to open the program’s help files to the page that describes the **License Registration Screen**.

Print: Click the **Print** button to print a text file of your registration form. The form will list your product code numbers.

Save As: Click the **Save As** button to save your registration form as an electronic file. A window will appear, in which you will need to enter a file name and specify a directory location for storing the file. Save the registration form as a text file (*.txt). In other words, enter a name such as **register.txt** in the **File Name** data field. After entering a file name and specifying a directory location, click the **Save** button to complete the procedure and close the window.

Register: Click the **Register** button to register your system. You will need to obtain license keys and enter them in order to register. When you have entered license keys and clicked the button, you will be prompted to restart the application in order to complete the registration process.

Cancel: Click the **Cancel** button to delete any changes you have made to the **License Registration Screen**.

Web: Click the **Web** button to open the on-line registration form. Fill in the information about your installation, and then click the **Register** button to send the form. You must have Internet Explorer 5.0 to register on-line.

3 Startup

How to Start the Program

When the OverDrive software is installed, an OverDrive icon and a Sybase icon will be created in the computer's **Start / Programs / Mettler Toledo** menu.

NOTE: You must open the Sybase database before starting the OverDrive program.

1. Open the Sybase database by selecting the Sybase icon and pressing the ENTER key (or double-clicking on it).
2. Select the OverDrive icon and press the ENTER key (or double-click on it). The **OverDrive Login** screen will open.

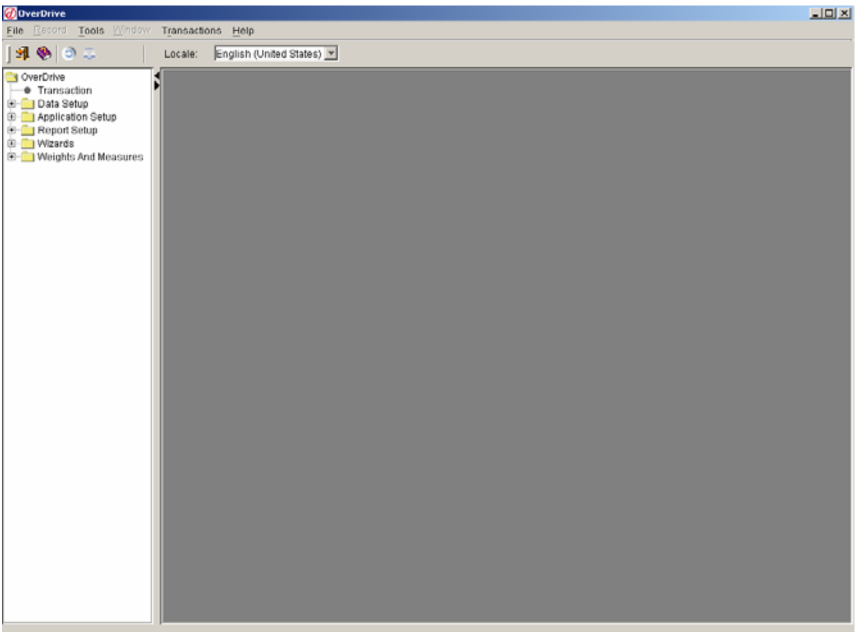
3. Type your user name in the **User Name** field.

4. Move the cursor to the **Password** field and type your password. The password will not be shown in the field; each character will appear as an asterisk.

   NOTE: Passwords are case sensitive.

5. Click the **Login** button or press the ENTER key to start the program (click the **Cancel** button to exit).

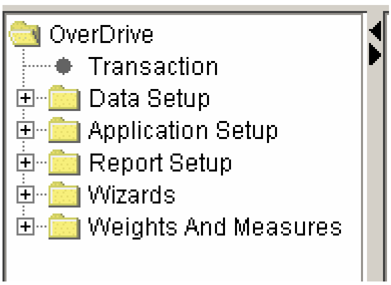
If you typed your user name and password correctly, the main OverDrive screen (shown below) will open.



This screen provides access to all OverDrive screens, tables, and functions. The rest of this chapter describes the basic features of the screen and how to use them.

Side Tree

A data structure tree is located at the left-hand side of the screen. It organizes the OverDrive 1st screens in a system of folders, making it easy to locate and open any screen. The contents of the side tree depend on the permissions assigned to the person who is logged in to the program. If a person does not have permission to use a screen, the screen will not be listed in the side tree.



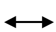
To open a folder, click on the plus sign to the left of it. When a folder is open, the plus sign changes to a minus sign. You can also double-click on the folder icon or folder name.

To close a folder, click on the minus sign to the left of it. You can also double-click on the folder icon or folder name.

To open a screen, click on the name of the screen.

To close a screen, click the **Close** button in the upper right-hand corner of the screen. Or click the control menu icon in the upper left-hand corner of the screen, and then click **Close** in the control menu.

There are left and right arrows in the border along the right edge of the side tree. Clicking on the left arrow closes the side tree. Clicking on the right arrow opens the side tree.



You can resize the area in which the tree is displayed. Position the cursor on the border until a double-headed arrow appears. Then hold down the mouse button and drag the border to the left or right.

Tool Bar

The tool bar at the top of the screen provides easy access to several commonly used functions.

Exit

This button closes the program.

Help

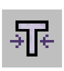
This button opens the program's help files.

Open Transaction Screen

This button opens the **Transaction** screen.

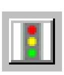
Open Virtual Scale

This button opens the virtual scale indicator or brings it to the front if it is behind the main screen.



Capture Vehicle Tare

This button opens a window that is used to record tare weights. A vehicle must be selected on the **Transaction** screen before you can capture a tare. The tare weight will be stored in the **Vehicle** table.



Enable Traffic Lights

This button displays the panel used to control traffic lights manually. This function is not available with the OverDrive 1st program.

Locale

This combo box is used to switch between languages. English is the only language available with the OverDrive 1st program.

Menu Bar

The menu bar at the top of the screen provides six pull-down menus. Those menus and the items in them are explained below. The keyboard shortcut for opening a menu is Alt + the letter that is underlined in the menu name.

File Menu

- **Exit:** This item closes the program.

Record Menu

The **Record** menu is used for working with database records and is active only when a data setup table is open.

- **Query:** This item searches a database table for one or more records. If all data fields on a table's **Form View** tab are empty, clicking **Query** will retrieve all records in the table. If you enter information in a data field, clicking **Query** will retrieve only those records that match the information. For example, entering a Carrier ID on the **Vehicle** form will limit a search to the vehicles that are operated by that carrier.
- **New:** This item clears all records that are displayed on a form or table so you can begin a new query or create a new record.
- **Save:** This item saves a new database record or saves changes made to an existing database record.
- **Delete:** This item deletes a record from the database. To delete a record, display it on the table's **Form View** tab or highlight it on the **Table View** tab and then click the **Delete** button.
- **First:** Click this item to return to the first record in a query.
- **Previous:** Click this item to return to the previous record.
- **Next:** Click this item to go forward to the next record.
- **Last:** Click this item to go forward to the last record in a query.

Tools Menu

The **Tools** menu is not available with the OverDrive 1st program.

Window Menu

The **Window** menu is active only when a window is open.

- **Cascade:** This item arranges all open windows one in front of another so that only the top and left edges of the windows in back are visible.

- **Tile Horizontal:** This item arranges all open windows one above another.
- **Tile Vertical:** This item arranges all open windows side by side.
- **Minimize All Windows:** This item minimizes all open windows. The minimized windows will be located at the bottom of the area where the windows are normally displayed, so you might have to scroll down to locate them.
- **Windows:** All open windows are listed at the bottom of the menu. If more than one window is open, clicking on the name of a window will bring it to the front of the other windows.

Transactions Menu

- **Load Numbers:** This item opens the **Load Numbers** window, which shows the load number and load counter for any transaction currently being run. A load number is assigned to an individual company and stored in the **Company** table record. The load counter tracks how many transactions have been processed for a load number.
- **Transaction Browser:** This item opens the **Transaction Browser** window so that you can view a table that lists all open transactions. Open transactions are two-pass transactions that have not been completed. When a vehicle returns for its second pass over the scale, the operator can open the transaction browser to find the record for the open transaction. Clicking on the record in the browser's table will display the transaction information on the **Transaction** screen.
- **Print Last Ticket:** This item reprints a new copy of the ticket for the most recent transaction processed on a scale.
- **Zero Scale:** This item adjusts the weight reading for an empty scale to zero. This command is used to compensate for minor changes in the weight reading caused when material such as snow or ice builds up on a scale. The command affects only the scale tab that is currently displayed on the **Transaction** screen. The scale must be empty when you zero it.
- **Refresh Combo Data:** This item refreshes the data in the combo boxes on the **Transaction** screen. This command is used to update the options listed in the combo boxes to reflect any recent changes to the database records. For example, you might have to create a record for a new account to complete a transaction. After creating the account record, refresh the combo data so that the new Account ID will appear in the **Account** combo box.
- **Capture Vehicle Tare:** This item opens a window that is used to record tare weights. A vehicle must be selected on the **Transaction** screen before you can capture a tare. The tare weight will be stored in the **Vehicle** table.

- **Enable Traffic Lights:** This feature is not available with the OverDrive 1st program.

Help Menu

- **Help Topics:** This item opens the program's help files.
- **Register:** This item opens the **License Registration** screen.
- **About:** This item displays information about the version of OverDrive software you are using.

Keyboard Shortcuts

F1 (Help): Opens the program's help files. Place the cursor in a data field and press the F1 key to open the help file for that data field.

F2 (Refresh Combo Data): Refreshes the data in the combo boxes on the **Transaction** screen to reflect recent changes in the database.

F3 (Search): Searches specific ID data fields to help locate database records.

F4 (Scale Tab): Switches to the next scale tab on the **Transaction** screen.

F5 (Product Detail Tab): Switches to the **Product Detail** tab on the **Transaction** screen.

F6 (Product List Tab): Switches to the **Product List** tab on the **Transaction** screen.

F7 (Tax Tab): Switches to the **Taxes and Surcharges** tab on the **Transaction** screen.

F8 (Get Weight): Reads the weight from a scale or opens the **Manual Weight** window so that you can enter a weight manually.

F9 (Accept): Records partial transaction data, such as the first weighing of a two-pass transaction.

F10 (File): Opens the **File** menu so that you can exit the current screen or the program.

F11 (Complete): Completes a transaction by recording a one-pass transaction or recording the final weighing of a two-pass transaction.

F12 (Transaction Browser): Opens the transaction browser.

Ctrl-F (Query): Searches for records in a database table.

Ctrl-N (Notes): Opens the **Transaction Notes** window to allow you to enter notes.

Ctrl-S (Save): Saves a new database record or saves changes made to an existing database record.

Ctrl-Delete (Delete): Deletes the database record that is currently displayed on a form.

Ctrl-Up Arrow (First): Returns to the first record in a table.

Ctrl-Left Arrow (Previous): Returns to the previous record.

Ctrl-Right Arrow (Next): Goes forward to the next record.

Ctrl-Down Arrow (Last): Goes forward to the last record in a table.

Ctrl-C (Cancel Transaction): Clears the data fields on the **Transaction** screen.

Ctrl-L (Clear Last Detail Record): Clears the most recent entry on the **Transaction** screen's **Product List** tab or **Product Detail** tab.

Ctrl-P (Print Last Ticket): Prints the ticket for the most recent transaction.

Alt-F4 (Close): Closes the program.

How to Close the Program

There are several ways to close the OverDrive 1st program:

- Click the **Close** button in the upper right-hand corner of the screen.
- Select **Exit** from the **File** menu.
- Click the **Control Menu** icon in the upper left-hand corner of the screen, and then select **Close** from the menu.
- Type Alt+F4 on your computer keyboard.

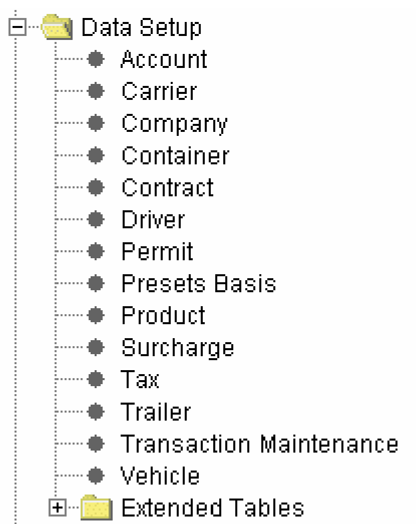
To close the database, right-click on the database icon in the lower right-hand corner of your computer screen and then click **Exit**.

4 Creating Database Records

Data Setup Tables

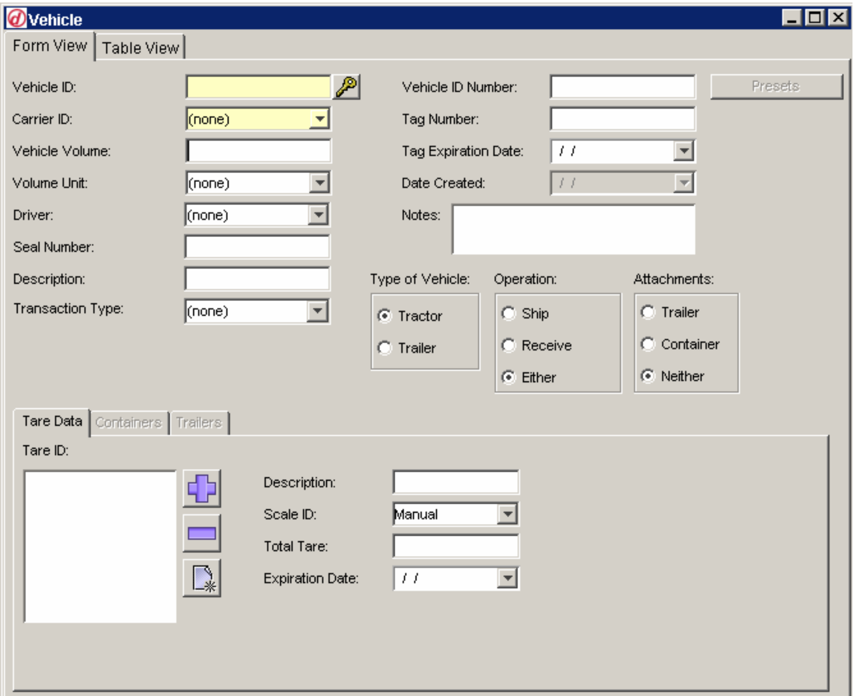
Before you can use the OverDrive system to process transactions, you must create database records. For example, you should create a record for each of the products that you handle and for each vehicle that transports those products. That information will be stored in the tables described in this chapter. The only limit to the number of records that you can store in your database is the amount of hard disk space available on the computer.

To view a table, open the **Data Setup** folder in the side tree and click on one of the tables listed below:



Forms

When you select a table from the **Data Setup** folder, the first thing you will see is the **Form View** tab. It is used to display an individual record from the table. A sample form for the **Vehicle** table is shown below.

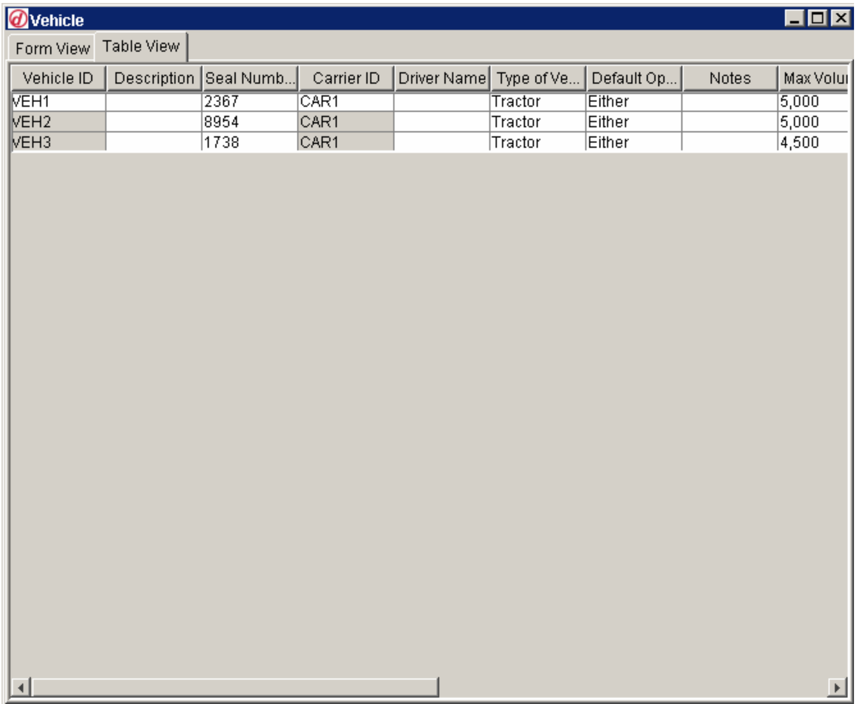


Each form contains data fields, which are used to enter, view, and edit information for a record.

- When you create a new record, you must enter a unique ID in the ID data field on the form. You can type an alphanumeric ID in the data field or click the **Get System Generated Key** button to have the system assign an ID and place it in the data field.
- Other data fields are optional. You can leave those fields blank when creating a record, but we suggest that you enter as much information as possible.

Tables

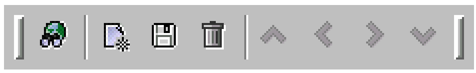
The **Table View** tab is used to display all the records or selected records stored in a table. A sample **Vehicle** table is shown below.



- Use the scroll bar at the bottom of the table to view all the data in the table.
- It is usually more convenient to view an individual record on the **Form View** tab. Locate the desired record on the **Table View** tab, click on it to select it, and then switch to the **Form View** tab.

Tool Bar

When you open a database table, a tool bar will appear on screen. The default location is below the menu bar in the upper left-hand corner of the screen, but you can move the tool bar to whatever location is most convenient. The push buttons on the tool bar are used to view or edit records in the database tables. You can use the buttons from both the **Form View** and **Table View** tabs.



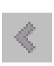
Query: Searches for records in a database table. The keyboard shortcut for this command is Ctrl-F.

New: Clears all records that are displayed on a form or table. This lets you begin a new query or begin entering data to create a new record.

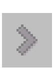
Save: Saves a new database record or saves changes made to an existing database record. The keyboard shortcut for this command is Ctrl-S.

Delete: Deletes the database record that is currently displayed on a form. The keyboard shortcut for this command is Ctrl-Delete.

First: Returns to the first record in a table. The keyboard shortcut for this command is Ctrl-Up Arrow.



Previous: Returns to the previous record. The keyboard shortcut for this command is Ctrl-Left Arrow.



Next: Goes forward to the next record. The keyboard shortcut for this command is Ctrl-Right Arrow.

Last: Goes forward to the last record in a table. The keyboard shortcut for this command is Ctrl-Down Arrow.

Query Procedure

You can use the **Query** button (or Ctrl-F key) to search for records in a database table.

- To retrieve all records in a table, clear all data fields on the form and click the **Query** button.
- To retrieve an individual record, enter its ID in the ID data field on the form and click the **Query** button.
- To retrieve a set of records, enter data as a filter in one or more data fields and then click the **Query** button.

A filter is data used to limit a search. For example, entering a Carrier ID on the **Vehicle** form will limit the search to those vehicles operated by the carrier. You can enter partial data as a filter by using a percent sign as a wildcard. For example, you can enter v% or %6 to search for Vehicle6.

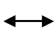
You can query for all records from either the **Form View** tab or the **Table View** tab. If your query includes filters, perform it from the **Form View** tab. The arrow buttons on the tool bar allow you to scroll through the records that you retrieve.

Modifying Tables

You can modify a table by sorting rows and columns and by changing column widths.

To sort rows, click on one of the column headings. The rows will be sorted so that the items under the heading that you clicked on are in alphanumerical order.

To rearrange columns, position the cursor on the heading of the column you want to move. Then hold down the mouse button and drag the column to a new location.



To change the width of a column, position the cursor on the right-hand border of a column heading until a double-headed arrow appears. Then hold down the mouse button and drag the column border to the desired width.

Editing Table Entries

You can create new records in a table, delete existing records, and edit existing records.

Creating a New Record

Open the **Data Setup** folder in the side tree and select the table to which you want to add a record. The form for that table will appear.

1. Fill in as many data fields as possible. The ID data field is yellow, indicating that it must be filled in when you create a database record. You can type in an ID or have the system assign an ID by clicking the **Get System Generated Key** button to the right of the ID data field.

   If you do not enter an ID or if you enter an ID that is currently used for another record, an error message will appear when you try to save the new record.

2. When you have entered all the information, click the **Save** button. This will enter the new record in the table.

Deleting an Existing Record

Open the **Data Setup** folder in the side tree and select the table from which you want to delete a record. The form for that table will appear.

1. Display the record you want to delete by entering its ID in the ID data field and then clicking the **Query** button.

   If you do not know the ID, click the **Query** button to retrieve all records in the table. Then select the record you want to delete. You can use the arrow buttons to scroll through the records or switch to the **Table View** tab to locate a record.

2. Click the **Delete** button to delete the record displayed on the form (or selected on the **Table View** tab). You will then be prompted to confirm the deletion.

Editing an Existing Record

Open the **Data Setup** folder in the side tree and select the table you want to edit. The form for that table will appear.

1. Display the record you want to edit by entering its ID in the ID data field and then clicking the **Query** button.

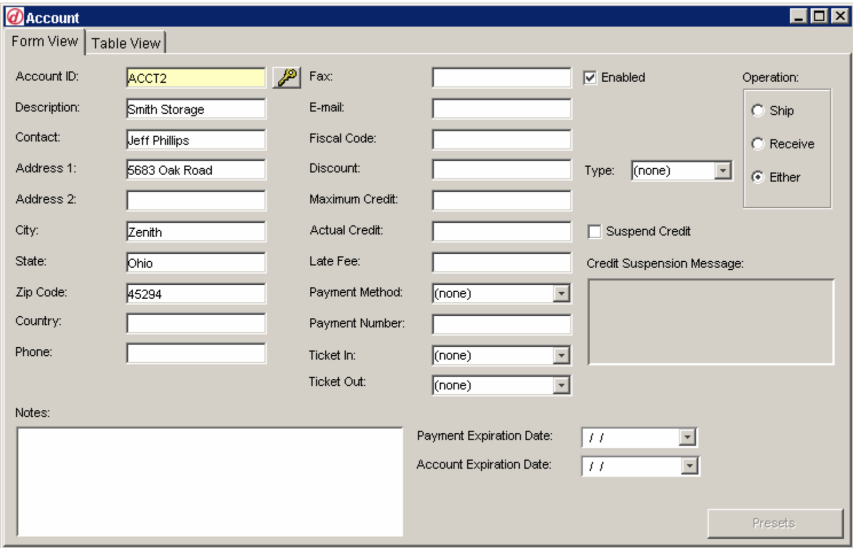
   If you do not know the ID, click the **Query** button to retrieve all records in the table. Then select the record you want to edit. You can use the arrow buttons to scroll through the records or switch to the **Table View** tab to locate a record. Click on the desired record in the table, and then return to the **Form View** tab. The record that you selected will be displayed on the form.

2. Type your changes in the data fields on the form. If a data field (such as the ID field) is gray, it cannot be edited.

3. When you have finished editing the record, click the **Save** button to update the existing record.

Account

This form lets you add, edit, and delete information about accounts (customers or suppliers). The **Enabled** box is checked by default; it must be checked in order to process transactions for the account.



Data Fields

Account ID:	The identifier for the account.
Description:	A description of the account.
Contact:	The contact person for the account.
Address 1:	The address for the account.
Address 2:	A second address line (if needed).
City:	The city where the account is located.
State:	The state where the account is located.
Zip Code:	The zip code for the account.
Country:	The country where the account is located.
Phone:	The telephone number for the account.
Fax:	The fax number for the account.
E-mail:	The E-mail address for the account.
Fiscal Code:	A tax identification number for the account.
Discount:	A discount (flat fee or percentage) allowed for the account. The price of the transaction will be reduced by this amount. To use a discount, you

must enter a number in this data field and select **Flat** or **Percent** in the **Type** combo box.

Maximum Credit: The maximum amount of credit for the account. NOTE: There is also a **Maximum Credit** field in the **Contract** table. When you create contracts for an account, the sum of the maximum credit limits for those contracts cannot exceed the maximum credit specified for the account.

Actual Credit: The amount of credit used for the account. This field updates automatically as credit is used.

Late Fee: A fee charged for late payment.

Payment Method: Select **Purchase Order**, **Credit Account**, **Check**, **Cash**, **Credit Card**, **Debit Card**, or **Pre Pay**.

Payment Number: A number assigned for payment (for example, a purchase order number or a credit card number).

Ticket In: Choose from a selection of predefined tickets to print when a vehicle enters your facility. If no inbound ticket will be printed, select **(none)**.

Ticket Out: Choose from a selection of predefined tickets to print when a vehicle exits your facility. If no outbound ticket will be printed, select **(none)**.

Enabled: Check this box to enable the account. If the box is not checked, you will not be able to process transactions for the account.

Type: Select the type of discount (**Flat** or **Percent**).

Operation: Select **Ship**, **Receive**, or **Either**. If you select **Either**, then both shipping and receiving transactions will be allowed for the account.

Notes: Additional information about the account.

Payment Expiration Date: The date when the payment method expires.

Account Expiration Date: The date when the account expires.

Suspend Credit: Check this box to prevent the account from using credit for transactions. When the box is checked, the account must use another payment method.

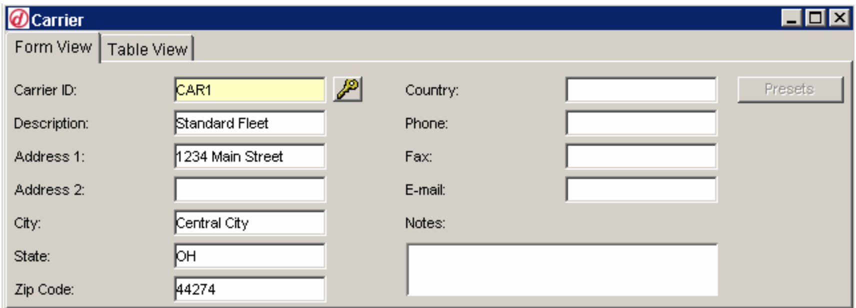
Credit Suspension Message: Enter a message to be displayed when an account with suspended credit tries to use credit for a transaction. If nothing is entered here, the system will use a default message.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link an account to other database records (see Chapter 6).

Carrier

This form lets you add, edit, and delete information about carriers whose vehicles transport products to or from your facility. A carrier can transport products for more than one account, and each account can use more than one carrier.



Data Fields

Carrier ID:	The identifier for the carrier.
Description:	A description of the carrier.
Address 1:	The address for the carrier.
Address 2:	A second address line (if needed).
City:	The city where the carrier is located.
State:	The state where the carrier is located.
Zip Code:	The zip code for the carrier.
Country:	The country where the carrier is located.
Phone:	The telephone number for the carrier.
Fax:	The fax number for the carrier.
E-mail:	The E-mail address for the carrier.
Notes:	Additional information about the carrier.

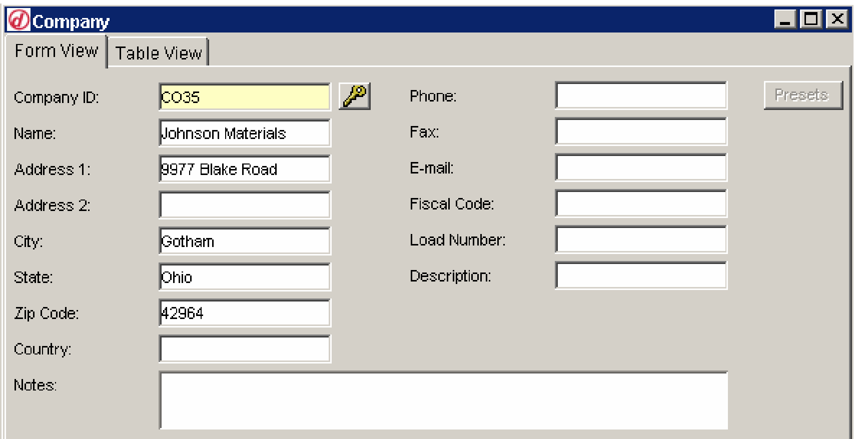
Push Buttons

Presets:	This button opens the **Presets** screen, which can be used to link a carrier to other database records (see Chapter 6).

Company

This form lets you add, edit, and delete information about the company that operates the scale(s) connected to the OverDrive system. If several companies share a scale, create a company record for each.

NOTE: Records for suppliers and customers of these companies are entered in the **Account** table.



Data Fields

Company ID:	The identifier for the company.
Name:	The name of the company.
Address 1:	The address of the company.
Address 2:	A second address line (if needed).
City:	The city where the company is located.
State:	The state where the company is located.
Zip Code:	The zip code for the company.
Country:	The country where the company is located.
Phone:	The telephone number for the company.
Fax:	The fax number for the company.
E-mail:	The E-mail address for the company.
Fiscal Code:	A tax identification number for the company.
Load Number:	If several companies use the scale(s), you can assign a load number for each company to track the transactions processed for each. The number

of transactions processed for a company will be shown by the **Load Counter**.

Description: A description of the company.

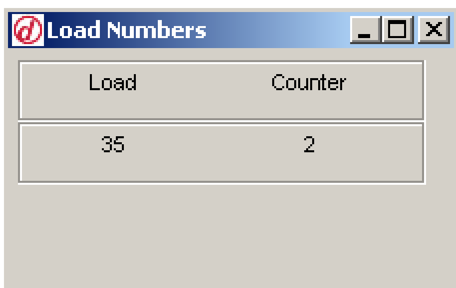
Notes: Additional information about the company.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a company to other database records (see Chapter 6).

Load Numbers

Load numbers are used to track the transactions processed by a company. To open the **Load Numbers** window, open the **Transaction** menu and click on the **Load Numbers** menu item.

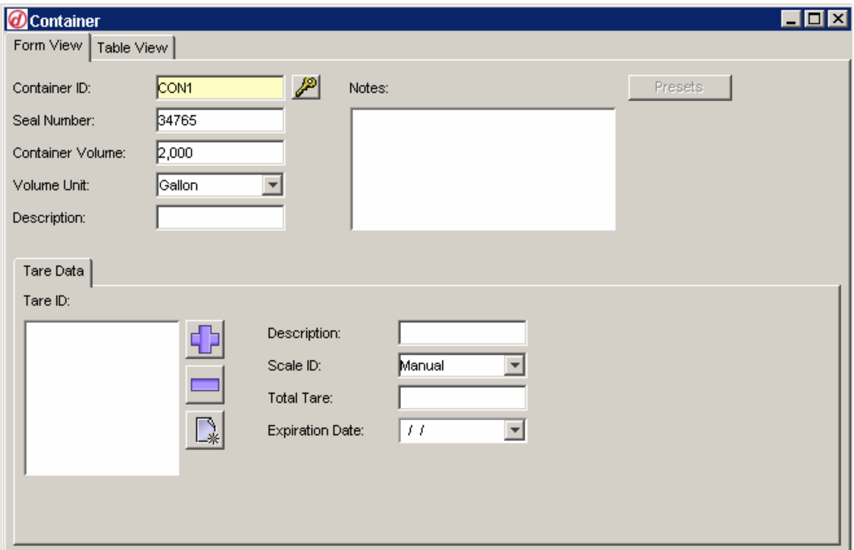


Load: This ID number is assigned to a company so that the system can track transactions processed for the company.

Counter: This counter tracks the number of transactions processed for an individual company (load number). The number is generated by the system.

Container

This form lets you add, edit, and delete information about containers. A container is an object that is placed on a vehicle to hold a product.



Data Fields

Container ID:	The identifier for the container.
Seal Number:	A number used for sealing the loaded container.
Container Volume:	The amount of product the container can hold.
Volume Unit:	The unit in which the container volume is measured (Cubic Meters, Cubic Yards, Gallons, Liters).
Description:	A description of the container.
Notes:	Additional information about the container.

Tare Data Tab

A container vehicle can have separate tare weights for the vehicle and the container. Use these data fields to assign a tare weight for the container.

Tare ID:	The identifier for the container tare.
Description:	A description of the tare.

Scale ID: The scale on which the container is being weighed.

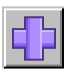
Total Tare: The tare weight of the container.

Expiration Date: The date that the tare expires.

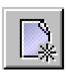
Entering a Tare

In order to process a transaction using a container, you must assign a tare weight for the container. Use the following procedure to enter a single tare weight.

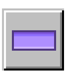
1. Type a description of the tare in the **Description** data field.
2. Select the scale on which the vehicle is being weighed from the **Scale ID** combo box. The weight reading from the scale will be shown in the **Total Tare** data field. If you selected a manual scale, type the tare weight in the data field.
3. If applicable, enter an expiration date.



4. Click the **Add** button. The system will record this data and enter a Tare ID for it in the list box.



You can enter more than one tare. Click the **New** button to clear the data fields. Then repeat the tare entry procedure. If you enter several tares, you will be able to select from among them when you process a one-pass transaction.



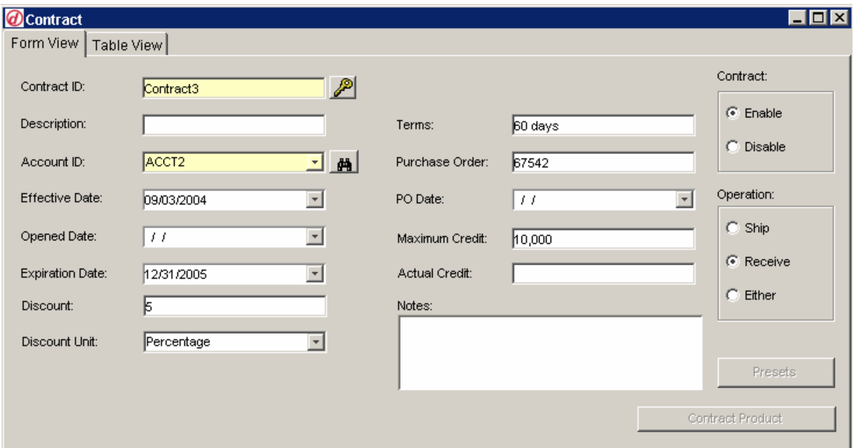
You cannot delete a Tare ID, but you can set it as expired. Highlight the Tare ID in the list box and click the **Remove** button. That will set the current date as an expiration date, so that the tare cannot be used unless you reset the expiration date. This allows you to keep a record of each expired tare.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a container to other database records (see Chapter 6).

Contract

This form lets you add, edit, and delete contract information for an account. Each account can have more than one contract. The **Enable** radio button is selected by default; it must be selected in order to process transactions using the contract.



Data Fields

Contract ID:	The identifier for the contract.
Description:	A description of the contract.
Account ID:	Use the combo box to choose from a list of enabled accounts. The account's record must already exist in the **Account** table.
Effective Date:	The date when the contract goes into effect.
Opened Date:	The date when the contract was entered.
Expiration Date:	The date when the contract expires.
Discount:	A discount (flat fee or percentage) that is applied when this contract is used. The price of the transaction will be reduced by this amount. To use a discount, enter a number in this data field and select **Percentage** or **Flat Fee** in the **Discount Unit** combo box.
Discount Unit:	Select the type of discount (**Percentage** or **Flat Fee**).
Terms:	The payment terms for the contract (for example, payment can be required in 30 or 60 days).
Purchase Order:	The purchase order number used for the contract.

PO Date: The date on which the purchase order was issued.

Maximum Credit: The maximum amount of credit for the account. NOTE: There is also a **Maximum Credit** field in the **Account** table. When you create contracts for an account, the sum of the maximum credit limits for those contracts cannot exceed the maximum credit specified for the account.

Actual Credit: The amount of credit that has been used for the account. As the account uses credit, this field will update automatically. When the account makes a payment, this field must be edited manually.

Notes: Additional information about the contract.

Contract: Select **Enable** to activate the contract. If the contract is disabled, it cannot be used for transactions.

Operation: Select **Ship**, **Receive**, or **Either**. If you select **Either**, then both shipping and receiving transactions will be allowed for the contract.

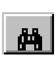
Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a contract to other database records (see Chapter 6).

Contract Product: This button opens the **Contract Product** table, which is described on the next page.

Search

A search function is provided for the **Account ID** data field on the **Contract** table to help you locate records more quickly.

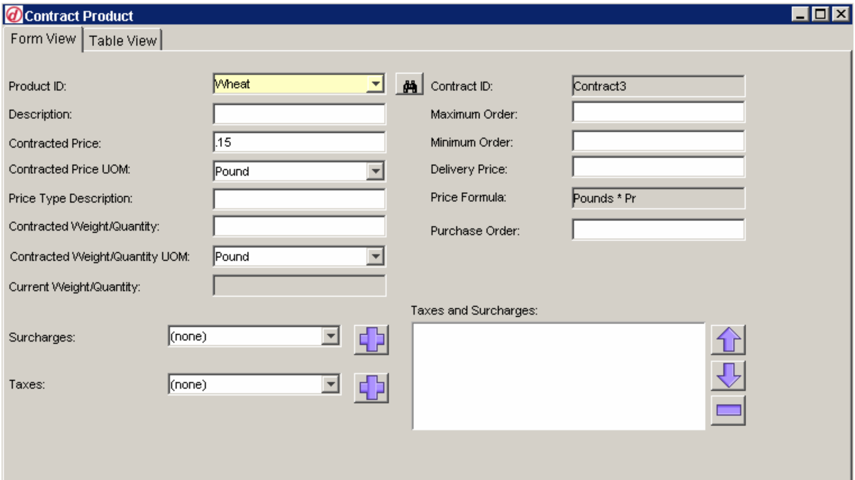


1. Place the cursor in the data field, and then click the **Search** button or press the F3 key to display the **Search** window.
2. Select the data field that you want to search in the **Field Name** combo box.
3. Enter the record that you want to find in the **Criteria** data field. Use a percent sign as a wildcard if you enter partial data. For example, enter "a%" or "%6" to search for Account6.
4. Click the **Search** button. The system will retrieve the records and display them in the **Results** table.
5. Highlight the desired record in the table, and then click the **OK** button. This will place the record in the **Account ID** data field.

If you click the **Search** button without selecting a field name, the system will retrieve the entire list of records for the data field.

Contract Product

This form is used to provide specific information about the contract and the product(s) covered by it.



Data Fields

Product ID: The identifier for the product that will be shipped or received under this contract. A record for the product must already exist in the **Product** table.

Description: A description of the contract product.

Contracted Price: The price used under this contract.

Contracted Price UOM: The unit of measure for the contracted price (Pound, Kilogram, Ton, Tonne, Cubic Yard, Cubic Meter, Liter, Gallon, Piece, Load).

Price Type Description: A description of the contracted price.

Contracted Weight/Quantity: The total amount of the product that can be processed under this contract.

Contracted Weight/ Quantity UOM: The unit of measure for the contracted weight or quantity (Pound, Kilogram, Ton, Tonne, Cubic Yard, Cubic Meter, Liter, Gallon, Piece, Load).

Current Weight/Quantity: The total amount of the product that has been processed. As transactions are processed, this amount will update automatically. If the current weight/quantity exceeds the contracted weight/quantity, an error message will be displayed.

Contract ID: The identifier for this contract.

Maximum Order: The maximum amount of the product that can be processed for a load.

Minimum Order: The minimum amount of the product that can be processed for a load.

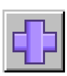
Delivery Price: The price of the delivered product (includes delivery costs).

Price Formula: The formula used to determine the price of the product. The default is net weight times unit price (Pounds * Pr).

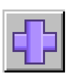
Purchase Order: The purchase order number used for the contract product. If a purchase order is entered here, it will override the purchase order entered in the contract record. Both can be overridden manually during a transaction.

Taxes and Surcharges

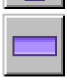
The **Taxes and Surcharges** list box displays the taxes and surcharges that will be applied to the price of the product.



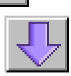
- To add a surcharge, select it in the **Surcharges** combo box and then click the **Add** button. Only one surcharge can be applied.



- To add a tax, select it in the **Taxes** combo box and then click the **Add** button. Only one tax can be applied.



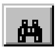
- To delete a tax or surcharge, highlight it in the list box and then click the **Remove** button.

- To change the position of an item in the list box, highlight it and use the up and down arrow buttons.

Search

A search function is provided for the **Product ID** data field on the **Contract Product** table to help you locate records more quickly.

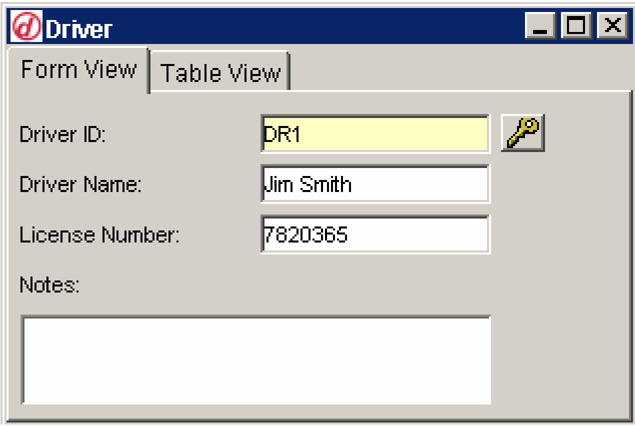


1. Place the cursor in the data field, and then click the **Search** button or press the F3 key to display the **Search** window.
2. Select the data field that you want to search in the **Field Name** combo box.
3. Enter the record that you want to find in the **Criteria** data field. Use a percent sign as a wildcard if you enter partial data. For example, enter "p%" or "%6" to search for Product6.
4. Click the **Search** button. The system will retrieve the records and display them in the **Results** table.
5. Highlight the desired record in the table, and then click the **OK** button. This will place the record in the **Product ID** data field.

If you click the **Search** button without selecting a field name, the system will retrieve the entire list of records for the data field.

Driver

This form lets you add, edit, and delete information about the person who drives a vehicle.

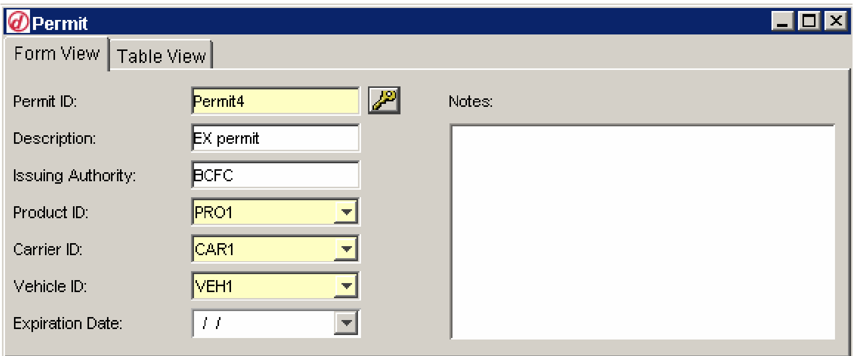


Data Fields

Driver ID:	The identifier for the driver.
Driver Name:	The name of the driver.
License Number:	The driver's license number.
Notes:	Additional information about the driver.

Permit

This form lets you add, edit, and delete information about permits needed to transport a specific type of product (for example, a permit to transport hazardous material).

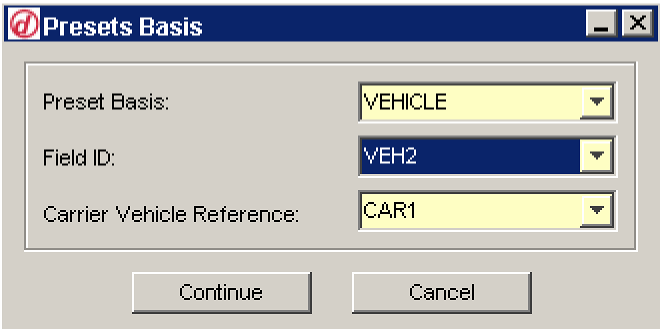


Data Fields

Permit ID:	The identifier for the permit.
Description:	A description of the permit.
Issuing Authority:	The organization that issued the permit.
Product ID:	The product covered by the permit. Select from a list of existing Product IDs.
Carrier ID:	The carrier covered by the permit. Select from a list of existing Carrier IDs.
Vehicle ID:	The vehicle covered by the permit. Select from a list of existing Vehicle IDs.
Expiration Date:	The date that the permit expires.
Notes:	Additional information about the permit.

Presets Basis

This form provides a shortcut to the **Presets** screen, which is used to create, view, and edit presets. See Chapter 6 for an explanation of how to create and use presets.

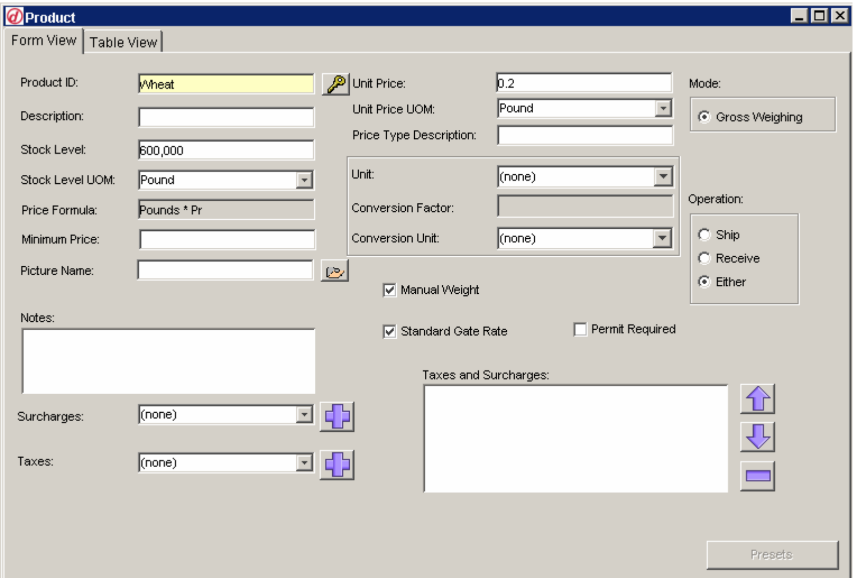


Data Fields

Preset Basis:	The table that contains the database record being used as the basis for the preset.
Field ID:	The specific database record that is used as the basis for the preset.
Carrier Vehicle Reference:	If a vehicle record is selected as the basis for the preset, the carrier linked to the vehicle will be shown in this data field.

Product

This form lets you add, edit, and delete information about the products that you will be weighing.



Data Fields

Product ID: The identifier for the product.

Description: A description of the product.

Stock Level: The amount of the product currently in stock. As the product is received or shipped, this value will be updated automatically.

Stock Level UOM: The unit of measure used for the stock level.

Price Formula: The formula used to determine the price of the product. The default is net weight times unit price (Pounds * Pr).

Minimum Price: You can set a minimum price for a product. This price will be used whenever the calculated price is lower than the minimum price.

Picture Name: You can display a picture of the product on the unattended touch screen. Click the **Open** button to search for a graphics file. Select a file and then click the **Open** button on the **Search** window.

Notes: Additional information about the product.

Unit Price: The price of the product. This price is applied per the unit of measure selected in the **Unit Price UOM** field. The unit price is stored as Pr and used in the price formula.

Unit Price UOM: The unit of measure used for the unit price.

Price Type Description: A description of the unit price.

Unit: The primary unit used for weighing the product (Pounds, Kilograms, Tons, Tonnes, Gallons, Liters, Cubic Yards, Cubic Meters).

Conversion Factor: A multiplier used to convert the primary unit to a secondary or conversion unit. The system will calculate the conversion factor for weight-to-weight or volume-to-volume conversions.

Examples:

Primary Unit	Conv. Factor	Conv. Unit
kg	2.2046	lb
lb	0.4536	kg

Conversion Unit: A secondary weight unit. The system will multiply the primary weight unit by the conversion factor to measure the product in the conversion unit.

Mode: Select **Gross Weighing**. Gross weighing is weighing a loaded vehicle and subtracting a tare weight to determine the weight of the product.

Operation: Select **Ship**, **Receive**, or **Either**. If you select **Either**, the product can be both shipped and received.

Manual Weight: Check this box if you want to be able to enter the weight of this product manually (it will still be possible to weigh the product on a scale).

Standard Gate Rate: This check box lets you control whether or not a product must be used with a contract. Before you can use a product with a contract, you must link the product to the contract in the **Contract Product** table. When you select a contract for a transaction, the **Product** combo box will list only those products that are linked to the contract.

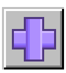
- If the box is checked, the product can be used with or without a contract. When no contract is selected for a transaction, the system will use the standard gate rate (the price assigned in the product record). When a contract is selected, the system will use the price assigned in the contract product record.

- If the box is not checked, the product can be used only if a contract is selected for the transaction. The system will use the price assigned in the contract product record.

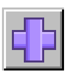
Permit Required: Check this box to require a permit to be selected when processing a transaction for the product.

Taxes and Surcharges

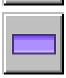
The **Taxes and Surcharges** list box displays the taxes and surcharges that will be applied to the price of the product.



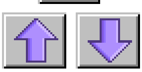
- To add a surcharge, select it in the **Surcharges** combo box and then click the **Add** button. Only one surcharge can be applied.



- To add a tax, select it in the **Taxes** combo box and then click the **Add** button. Only one tax can be applied.



- To delete a tax or surcharge, highlight it in the list box and then click the **Remove** button.



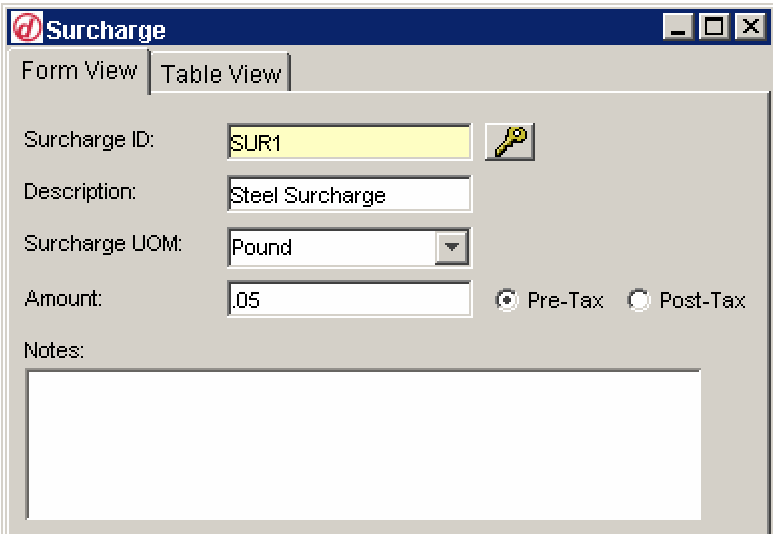
- To change the position of an item in the list box, highlight it and use the up and down arrow buttons.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a product record to other database records (see Chapter 6).

Surcharge

This form lets you add, edit, and delete information about surcharges that are applied to transactions. A surcharge is an additional fee added to the price of a product.

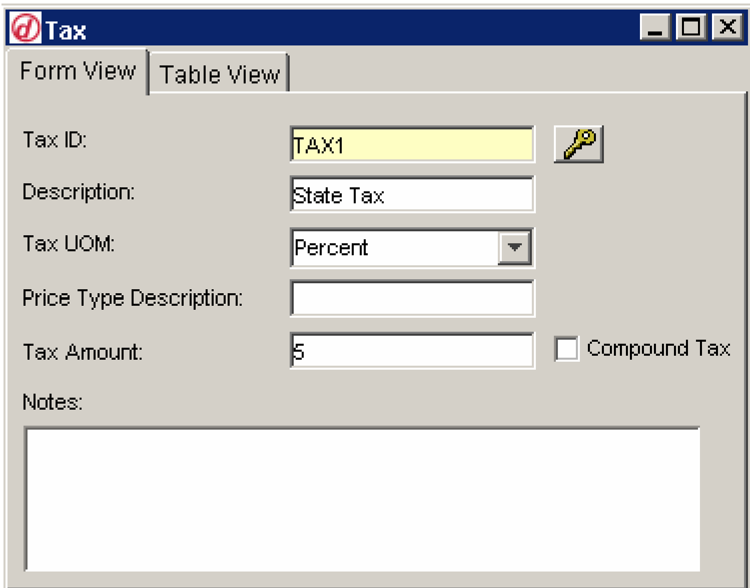


Data Fields

Surcharge ID:	The identifier for the surcharge.
Description:	A description of the surcharge.
Surcharge UOM:	The unit of measure for the surcharge amount. Surcharges can be applied per unit of weight or volume, per load, or by percentage of price.
Amount:	The amount of the surcharge applied to the transaction. This number is applied based on the unit selected in the **Surcharge UOM** field.
Pre-Tax:	Select this radio button to apply the surcharge before taxes. If the surcharge is applied before taxes, it will be taxed at the same rate as the product.
Post-Tax:	Select this radio button to apply the surcharge after taxes. If the surcharge is applied after taxes, it will not be taxed.
Notes:	Additional information about the surcharge.

Tax

This form lets you add, edit, and delete information about taxes that are applied to transactions.

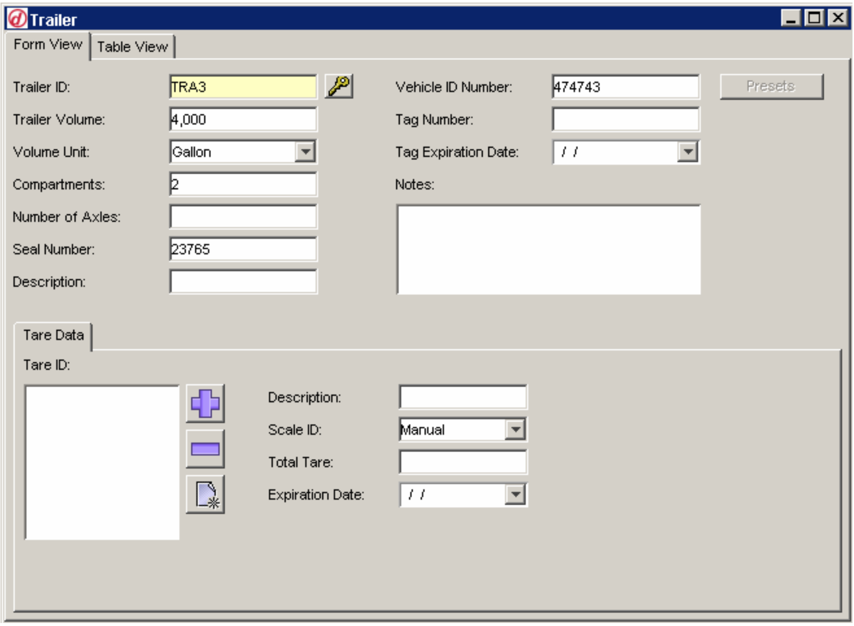


Data Fields

Tax ID:	The identifier for the tax.
Description:	A description of the tax.
Tax UOM:	The unit of measure for the tax amount. Taxes can be applied per unit of weight or volume, per load, or by percentage of price.
Price Type Description:	A description of the price type.
Tax Amount:	The amount of the tax applied to the transaction. This number is applied based on the unit selected in the **Tax UOM** field.
Compound Tax:	Check this box if the tax is to be compounded. A compound tax can be used when more than one tax will be applied to transactions. If you check the box, the tax will be applied to the cost of the entire transaction, including other taxes. If you do not check the box, the tax will be applied to the price of the product but not to other taxes.
Notes:	Additional information about the tax.

Trailer

This form lets you add, edit, and delete information about trailers that are attached to vehicles.



Data Fields

Trailer ID:	The identifier for the trailer.
Trailer Volume:	The amount of product the trailer can hold.
Volume Unit:	The unit in which the trailer volume is measured (Cubic Meters, Cubic Yards, Gallons, Liters).
Compartments:	The number of compartments in the trailer.
Number of Axles:	The number of axles on the trailer.
Seal Number:	A number used for sealing the loaded trailer.
Description:	A description of the trailer.
Vehicle ID Number:	A vehicle identification number for the trailer.
Tag Number:	The license plate number of the trailer.
Tag Expiration Date:	The date that the tag expires.
Notes:	Additional information about the trailer.

Tare Data Tab

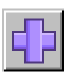
You can assign a tare weight for a trailer and a tare weight for each of the trailer's axles. The sum of the axle tare weights should equal the tare weight of the trailer.

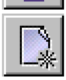
Tare ID:	The identifier for the trailer tare.
Description:	A description of the tare.
Scale ID:	The scale on which the trailer is being weighed.
Total Tare:	The total tare weight of the trailer.
Expiration Date:	The date that the tare expires.

Entering a Tare

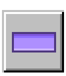
In order to process a transaction using a trailer, you must assign a tare weight for the trailer. Use the following procedure to enter a single tare weight.

1. Type a description of the tare in the **Description** data field.
2. Select the scale on which the vehicle is being weighed from the **Scale ID** combo box. The weight reading from the scale will be shown in the **Total Tare** data field. If you selected a manual scale, type the tare weight in the data field.
3. If applicable, enter an expiration date.
4. Click the **Add** button. The system will record this data and enter a Tare ID for it in the list box.





You can enter more than one tare. Click the **New** button to clear the data fields. Then repeat the tare entry procedure. If you enter several tares, you will be able to select from among them when you process a one-pass transaction.



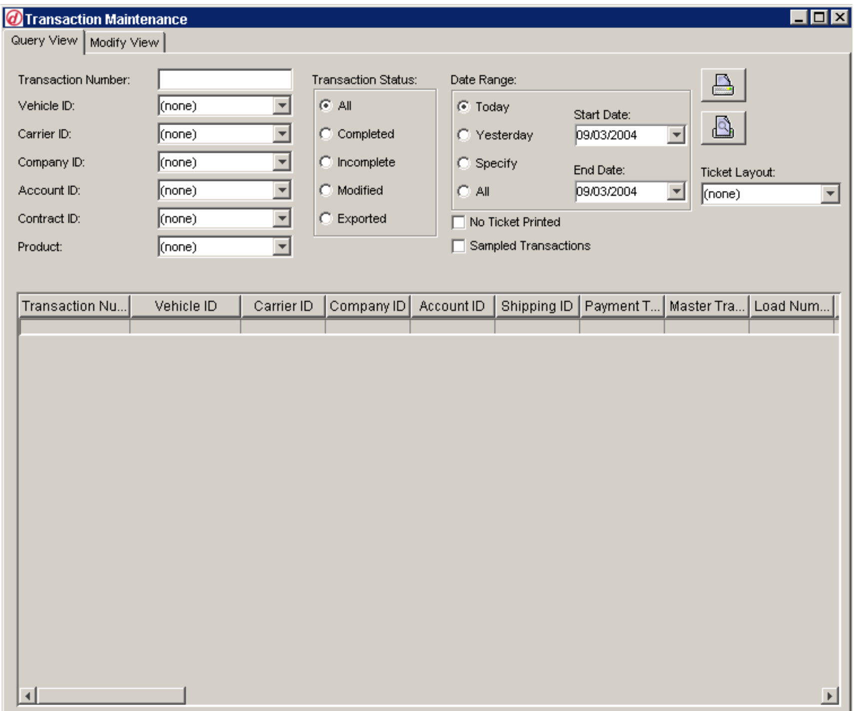
You cannot delete a Tare ID, but you can set it as expired. Highlight the Tare ID in the list box and click the **Remove** button. That will set the current date as an expiration date, so that the tare cannot be used unless you reset the expiration date. This allows you to keep a record of each expired tare.

Push Buttons

Presets:	This button opens the **Presets** screen, which can be used to link a trailer record to other database records (see Chapter 6).

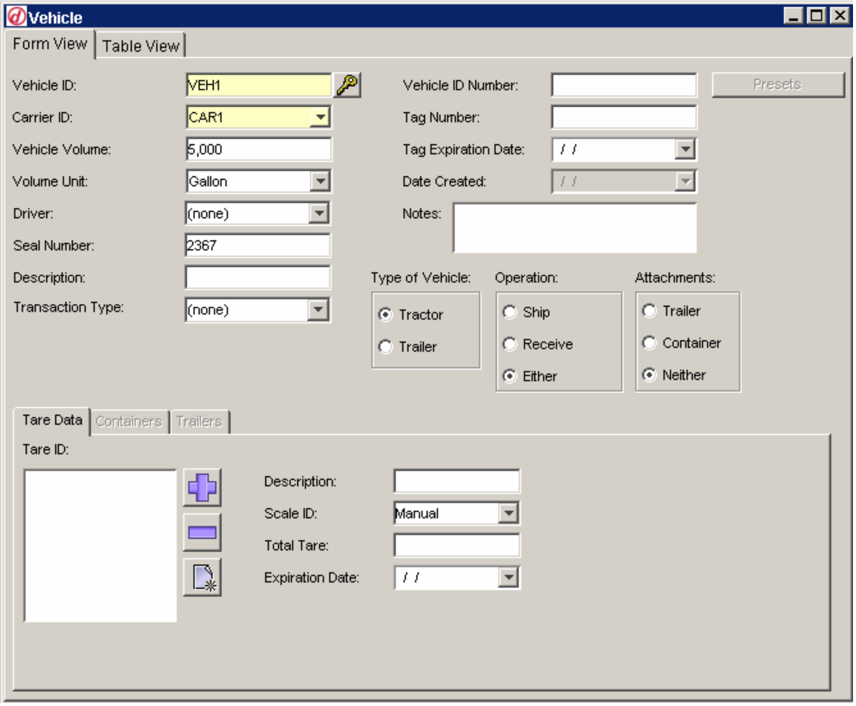
Transaction Maintenance

This form lets you view records of transactions and make changes to them. See Chapter 9 for an explanation of how to manage transaction records.



Vehicle

This form lets you add, edit, and delete information about vehicles that are weighed on your scales.



Data Fields

Vehicle ID: The identifier for the vehicle. Each vehicle must be assigned to a carrier, and each vehicle/carrier combination is a unique record. You can duplicate Vehicle IDs if they are assigned to different carriers (for example, Veh1/CarrierA and Veh1/CarrierB).

Carrier ID: The identifier for the carrier that owns the vehicle. This ID must already exist in the **Carrier** table.

Vehicle Volume: The amount of product the vehicle can hold. The volume is measured in the unit selected in the **Volume Unit** data field. The vehicle volume can be changed manually during a transaction. A vehicle volume will override a product volume (created by conversion factor) but will be overridden by a container or trailer volume).

Volume Unit:	The unit in which the volume is measured (Cubic Meters, Cubic Yards, Gallons, Liters).
Driver:	The name of the vehicle's driver.
Seal Number:	A number used for sealing the loaded vehicle.
Description:	A description of the vehicle.
Transaction Type:	If you select a transaction type (One Pass or Two Pass), it will be used as the default transaction type for the vehicle. This transaction type will be selected automatically when you select the vehicle for a transaction; however, you can override the transaction type manually.
Vehicle ID Number:	A vehicle identification number. This is not the ID used by the system to identify the record.
Tag Number:	The license plate number for the vehicle.
Tag Expiration Date:	The date that the tag expires.
Date Created:	The date that the vehicle record was created.
Notes:	Additional information about the vehicle.
Type of Vehicle:	Select **Tractor** or **Trailer**.
Operation:	Select **Ship**, **Receive**, or **Either**. If you select **Either**, the vehicle can be used for both shipping and receiving.
Attachments:	Select **Trailer**, **Container**, or **Neither**. If you select **Trailer**, the **Trailer** tab will be enabled and the system will expect the vehicle to be weighed with a trailer attached. If you select **Container**, the **Container** tab will be enabled and the system will expect the vehicle to be weighed with a container attached. If you select **Neither**, you will not be able to use a vehicle attachment.

Tare Data Tab

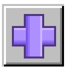
This tab lets you assign a tare weight for a vehicle so that the vehicle can be used for one-pass transactions. You can also assign a tare weight using the **Capture Vehicle Tare** command in the **Transactions** menu.

Tare ID:	The identifier for the vehicle tare.
Description:	A description of the vehicle tare.
Scale ID:	The scale on which the vehicle is being weighed.
Total Tare:	The total tare weight of the vehicle.
Expiration Date:	The date that the tare expires.

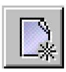
Entering a Tare

Use the following procedure to enter a single tare weight.

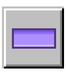
1. Type a description of the tare in the **Description** data field.
2. Select the scale on which the vehicle is being weighed from the **Scale ID** combo box. The weight reading from the scale will be shown in the **Total Tare** data field. If you selected a manual scale, type the tare weight in the data field.
3. If applicable, enter an expiration date.



4. Click the **Add** button. The system will record this data and enter a Tare ID for it in the list box.



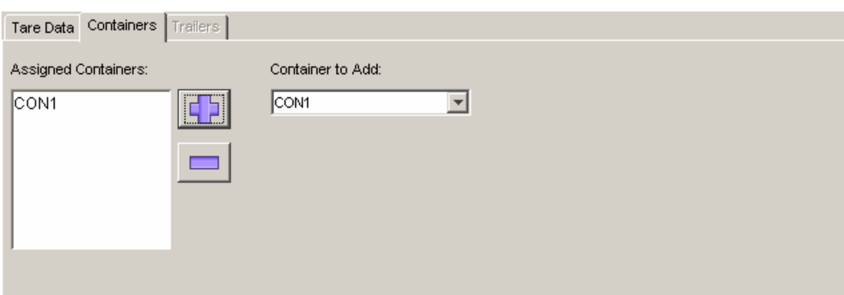
You can enter more than one tare. Click the **New** button to clear the data fields. Then repeat the tare entry procedure. If you enter several tares, you will be able to select from among them when you process a one-pass transaction.

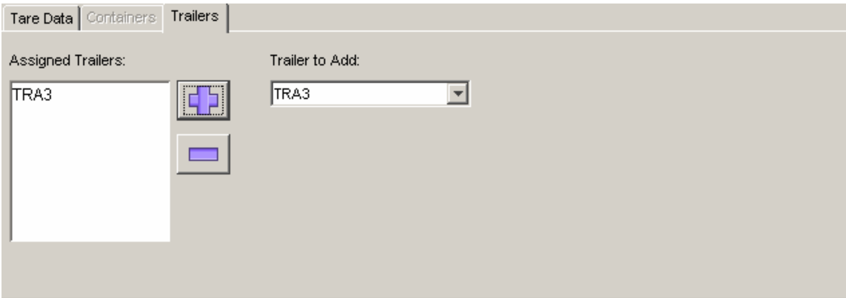


You cannot delete a Tare ID, but you can set it as expired. Highlight the Tare ID in the list box and click the **Remove** button. That will set the current date as an expiration date, so that the tare cannot be used unless you reset the expiration date. This allows you to keep a record of each expired tare.

Containers and Trailers Tabs

These tabs are available only if you select the **Container** or **Trailer** radio button. They let you assign containers and trailers for use with a vehicle. You must create a record for a container (or trailer) in the **Container** (or **Trailer**) table before you can assign it to a vehicle.

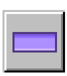




1. Select the **Container** or **Trailer** radio button to activate the appropriate tab.
2. Select a container (or trailer) from the **Container to Add** (or **Trailer to Add**) combo box on the tab.

3. Click the **Add** button on the tab. The Container ID (or Trailer ID) will appear in the **Assigned Containers** (**or Assigned Trailers**) list box. You can assign more than one container (or trailer) to a vehicle.

When you process a transaction for a container (or trailer) vehicle, you will need to select a Container ID (or Trailer ID) on the **Transaction** screen. If you have assigned containers (or trailers) to a vehicle, you will be limited to selecting from the assigned containers (or trailers). Otherwise, you will be able to select from a list of all existing containers (or Trailers).



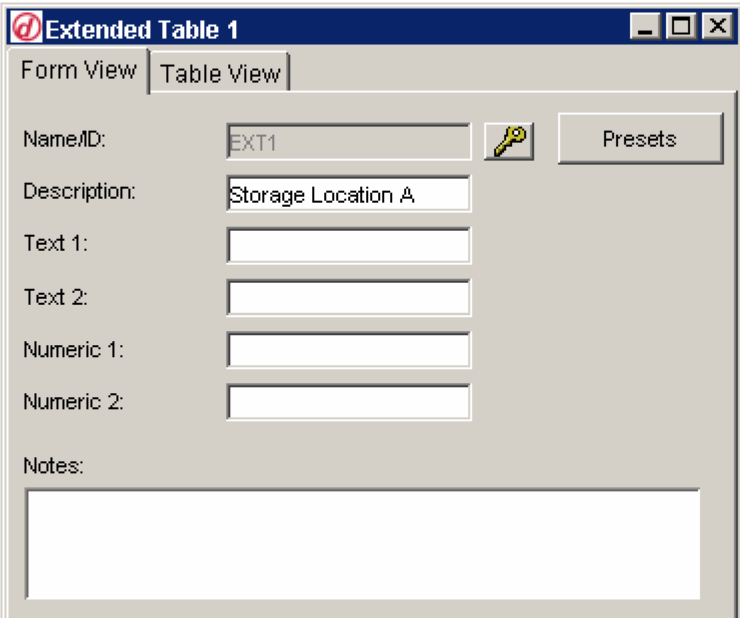
To delete an assigned container (or trailer), highlight it in the list box and click the **Remove** button.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a vehicle record to other database records (see Chapter 6).

Extended Tables

There are four extended tables, which are additional tables that can be used to store information not found in the program's standard tables. They enable you to customize a system by creating tables for information specific to your operation.



Data Fields

Name/ID:	The identifier for the record.
Description:	A description of the record.
Text 1:	This field can be used for alphanumeric data.
Text 2:	This field can be used for alphanumeric data.
Numeric 1:	This field can be used for numeric data.
Numeric 2:	This field can be used for numeric data.
Notes:	Additional information about the record.

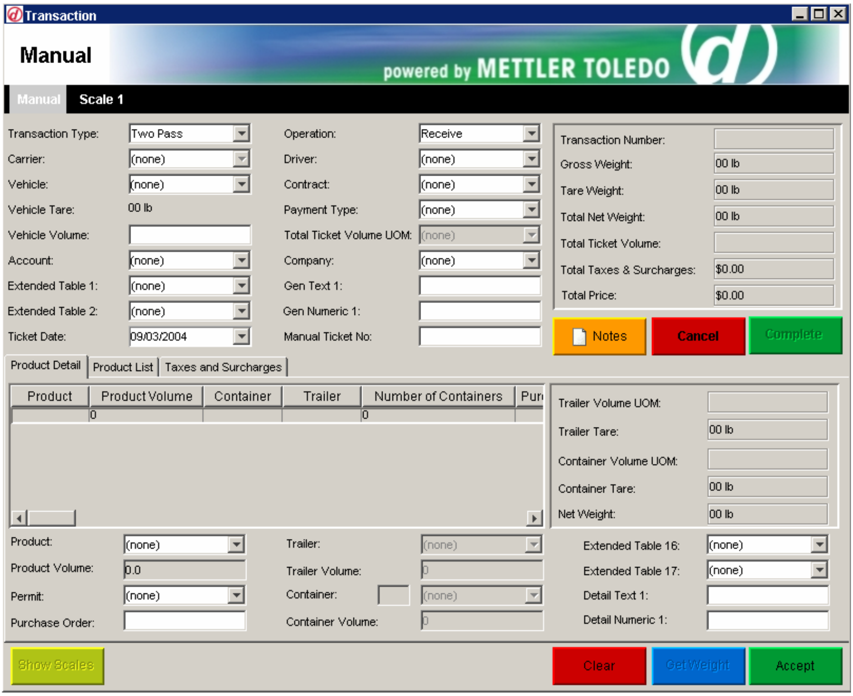
Push Buttons

Presets:	This button opens the **Presets** screen, which can be used to link an extended table record to other database records (see Chapter 6).

5 Processing Transactions

Transaction Screen

The OverDrive 1st **Transaction** screen is used to process vehicle scale transactions. You can open the screen by clicking on **Transaction** in the side tree or clicking the **Open Transaction Screen** button. The demo version of the **Transaction** screen is shown below.



Scale Tabs

The system can be connected to as many as six scales. Each scale corresponds to a scale tab on the **Transaction** screen.

When you process a transaction, you must select the tab for the scale on which the vehicle is being weighed. The **Manual** tab is not connected to a scale; it allows you to enter a weight manually. To select a scale tab, click on the tab or press the F4 key.

Combo Boxes

Most of the information that you will enter during a transaction is retrieved from existing database records. For example, you can select a vehicle from the records that you created in the **Vehicle** table. Simply click on the **Vehicle** combo box’s down arrow to display a list of Vehicle IDs, and then click on the ID that you want.

Other Data Fields

In addition to the combo boxes, there are data fields for data that must be entered manually or data that cannot be edited. An example of data to be entered manually is a purchase order number that would be different for each transaction. Simply place the cursor in the data field and type the entry.

Data that cannot be edited is read from a database record or a scale. For example, the vehicle tare is retrieved from the database record for the vehicle selected in the combo box. The only way to change it would be to change the database record.

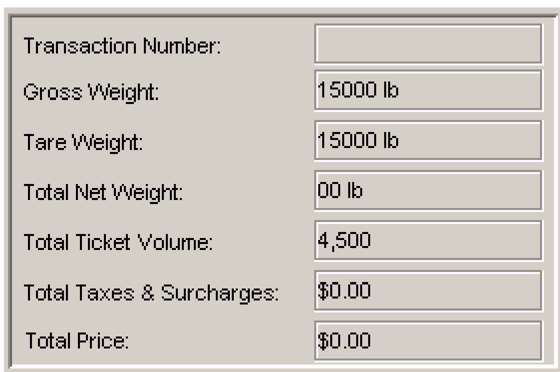
A vehicle can have more than one tare weight (for example, when individual axles are weighed separately). When that is the case, a list box will appear next to the **Vehicle Tare** data field. Use the list box to select the desired Tare ID for a weighing.

Manual Ticket Number: Use this field to enter a manual ticket number when a weight is entered manually during a transaction. The field is visible only when the Manual scale is selected.

Ticket Date: Use the calendar in this combo box to backdate a ticket for a manual weighing transaction. The date that is selected cannot be later than the current date and cannot be earlier than 60 days before the current date. It must also agree with other system requirements. For example, if a permit is selected for a transaction, the ticket date must fall within the period when the permit is in effect. The **Ticket Date** field is visible only when the Manual scale is selected.

Transaction Data Group

This group of data fields tracks basic information about the current transaction.



Transaction Number: This system-generated number keeps track of the total number of transactions processed by the system.

Gross Weight: This field shows the gross weight of the loaded vehicle that is being weighed on the scale.

Tare Weight: This field shows the tare weight of the loaded vehicle that is being weighed on the scale.

Total Net Weight: This field shows the net weight of the product that is being weighed on the scale.

Total Ticket Volume: This field shows the total volume of the vehicle that is being weighed on the scale.

Total Taxes & Surcharges: This field shows the total amount of taxes and surcharges applied to the current transaction.

Total Price: This field shows the total cost of the current transaction.

Push Buttons

Complete: This button completes a transaction. Use the **Complete** button to record a one-pass transaction or to record the final weighing of a two-pass transaction. The keyboard shortcut for this command is F11.

Cancel: This button clears the data fields on the **Transaction** screen so that you can start a new transaction. The keyboard shortcut for this command is Ctrl-C.

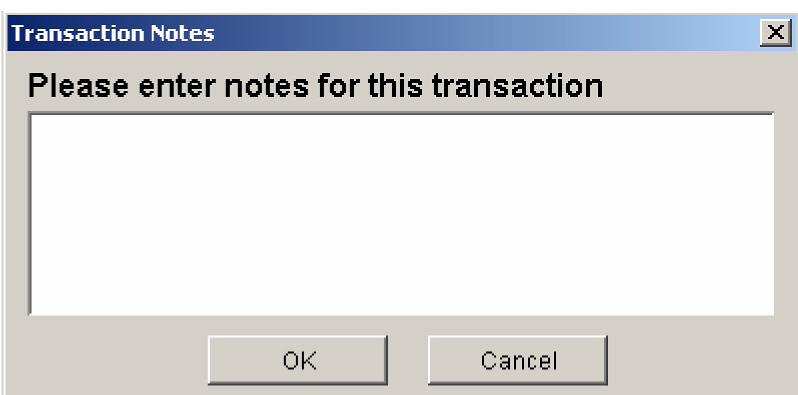
Clear: This button clears the data fields on the tab that is currently displayed.

Accept: This button accepts partial transaction data. Use the **Accept** button to record the first weighing of a two-pass transaction. To record the final weighing of a two-pass transaction, use the **Complete** button. The keyboard shortcut for this command is F9.

Get Weight: This button reads the weight from a scale. The system will read the weight from the scale that corresponds to the scale tab that is selected. If the **Manual** scale tab is selected, you will be prompted to enter a weight manually. The keyboard shortcut for this command is F8.

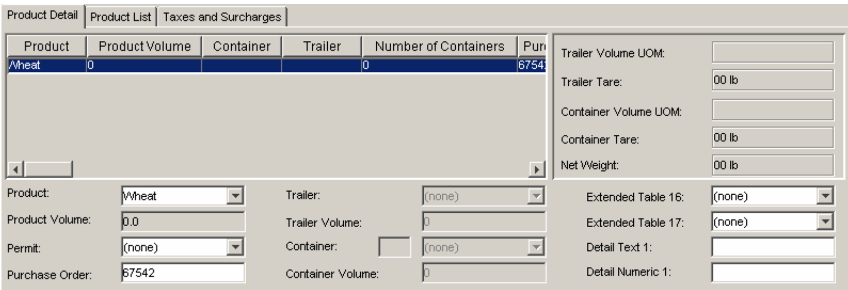
Show Scales: This button opens a window that lets you select a scale to continue a transaction. It is used if a truck makes its first pass on one scale and makes a subsequent pass on a different scale. The button is active only when you are continuing or completing an open transaction.

Notes: This button opens a window that can be used to enter notes about the current transaction. The keyboard shortcut for this command is Ctrl-N.



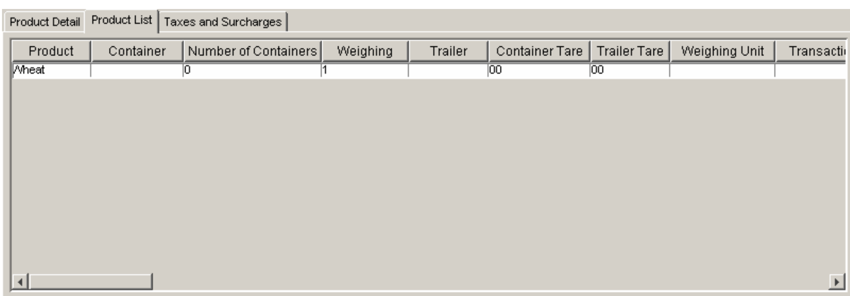
Product Detail Tab

Use the **Product** combo box to select a product for the transaction. The tab also displays weight data for any trailer or container used for the transaction.



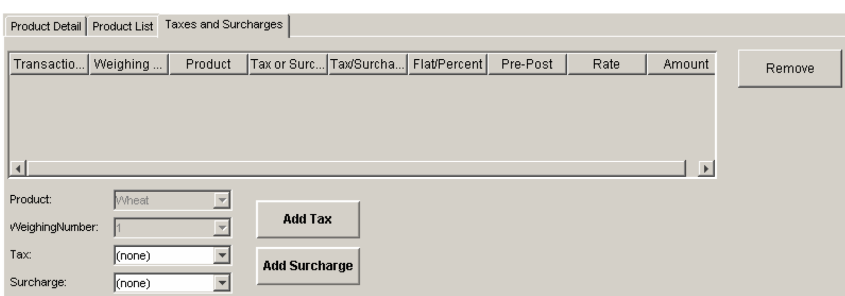
Product List Tab

This tab shows a list of the products being weighed for the current transaction.



Taxes and Surcharges Tab

Use this tab to apply taxes and surcharges to a transaction. The table at the bottom of the tab shows the tax and surcharge data for the current transaction.



Add Tax: This button adds a tax to the cost of the product being weighed. Select a tax in the **Tax** combo box, and then click the **Add Tax** button. The tax will be listed in the table on the tab.

Add Surcharge: This button adds a surcharge to the cost of the product being weighed. Select a surcharge in the **Surcharge** combo box, and then click the **Add Surcharge** button. The surcharge will be listed in the table on the tab.

Remove: This button deletes taxes and surcharges that have been applied to a transaction. Highlight the tax or surcharge in the table on the tab, and then click the **Remove** button.

Additional Data Fields

The **Transaction** screen has four user-defined data fields for storing transaction information that is specific to an application. The main area of the screen includes a **Gen Text 1** field for entering alphanumeric data and a **Gen Numeric 1** field for entering numeric data. The **Product Detail** tab includes a **Detail Text 1** field for entering alphanumeric data and a **Detail Numeric 1** field for entering numeric data.

Types of Transactions

The OverDrive 1st system can process transactions for one-pass and two-pass weighing. Choose the desired method from the **Transaction Type** data field on the **Transaction** screen.

- **One-pass weighing:** Weigh a loaded vehicle and use a stored tare or manually entered tare to determine the net weight of the product being shipped or received.
- **Two-pass weighing:** Weigh a vehicle once when it is empty and once when it is loaded to determine the net weight of the product being shipped or received.

One-Pass Weighing

1. When a vehicle drives onto the scale, the virtual indicator will display the weight reading from the scale.
2. Open the **Transaction** screen and select the tab for the scale on which the vehicle is being weighed. If you will be entering the weight manually, select the **Manual** tab.
3. Select **One Pass** from the combo box in the **Transaction Type** data field.
4. Use the **Carrier** combo box to select the carrier linked to the vehicle that is being weighed.
5. Use the **Vehicle** combo box to select the vehicle that is being weighed.
6. Use the other combo boxes to select an account and any other data that you need to record for the transaction. If presets exist, some of the data will be entered automatically.
7. Select the **Product Detail** tab, and use the **Product** combo box to select a product.
8. Click the **Get Weight** button. The gross weight will be read from the scale and displayed in the **Gross Weight** data field. If the vehicle record includes a tare weight, it will be shown in the **Tare Weight** data field. If the vehicle record does not include a tare weight, you will be prompted to enter one manually.
9. If taxes or surcharges are required, select the **Taxes and Surcharges** tab. Use the combo boxes to enter the correct product, tax, and surcharge. Click the **Add Tax** button to apply the tax. Then click the **Add Surcharge** button to apply the surcharge. The tax and surcharge information will be displayed in the table on the tab.
10. If the information for the transaction is correct, click the **Complete** button. A record of the transaction will be saved to the database, and a ticket will be printed or stored.

Two-Pass Weighing

For a two-pass transaction, you must enter the Vehicle ID during the first pass over the scale. You can enter other data during either pass. Entering data during the second pass is often preferable for outbound transactions, since the product is not loaded onto the vehicle until after the first pass.

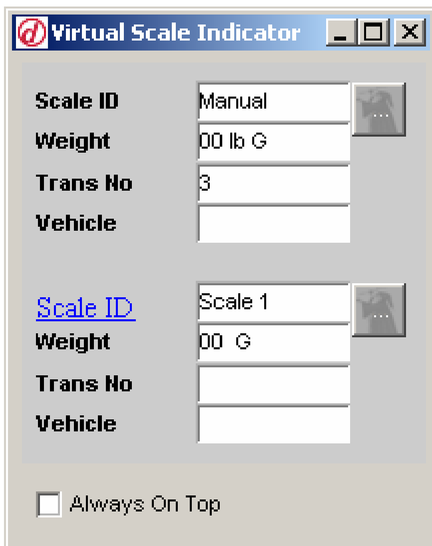
1. When a vehicle drives onto the scale, the virtual indicator will display the weight reading from the scale.
2. Open the **Transaction** screen and select the tab for the scale on which the vehicle is being weighed. If you will be entering the weight manually, select the **Manual** tab.
3. Select **Two Pass** from the combo box in the **Transaction Type** data field.
4. Use the **Carrier** combo box to select the carrier linked to the vehicle that is being weighed.
5. Use the **Vehicle** combo box to select the vehicle that is being weighed.
6. Use the other combo boxes to select an account and any other data that you need to record for the transaction. In some cases, this data can be entered during the second pass. If presets exist, some of the data will be entered automatically.
7. Select the **Product Detail** tab and use the **Product** combo box to select a product. This data can also be entered during the second pass.
8. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field. If you are using a manual scale, you will be prompted to enter a weight.
9. Click the **Accept** button to record the first part of the transaction and store it as an open transaction. If the program is set up to print inbound tickets, a ticket for the first pass over the scale will be printed now.
10. The vehicle can now leave the scale. If this is a receive transaction, the driver will now have the vehicle unloaded. If this is a ship transaction, the driver will now have the vehicle loaded.
11. When the vehicle returns to the scale for the second pass, retrieve the record for the open transaction. To do that, select the carrier from the **Carrier** combo box and the vehicle from the **Vehicle** combo box. You can also retrieve the record by opening the **Transactions** menu and clicking on **Transaction Browser**. This will display a **Transaction Browser** table that lists all open transactions. Locate the transaction you want,

and click on it to display the data from the first pass on the **Transaction** screen.

12. Make sure the weight information displayed on the screen is correct.
13. If product, account, or other data need to be entered during the second pass, enter it now.
14. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field for a ship transaction or in the **Tare Weight** data field for a receive transaction. If you are using a manual scale, you will be prompted to enter a weight.
15. If taxes or surcharges are required, select the **Taxes and Surcharges** tab. Use the combo boxes to enter the correct product, tax, and surcharge. Click the **Add Tax** button to apply the tax. Then click the **Add Surcharge** button to apply the surcharge. The tax and surcharge information will be displayed in the table on the tab.
16. If the information for the transaction is correct, click the **Complete** button. A record of the transaction will be saved to the database, and a ticket will be printed or stored.

Virtual Scale Indicator

The virtual scale indicator displays current information from each of the scales connected to the system. It allows the system operator to view the activity on all scales simultaneously while processing transactions. When you log in to the system, the virtual scale indicator opens automatically. You can resize the indicator, reposition it, and check the **Always on Top** box so that it will be displayed over top of other screens that are open.



Data Fields

Scale ID: This identifies the scale from which the weight and transaction information is being read. If you are using a JAGXTREME terminal, you can click on the **Scale ID** hyperlink to open a JAGXTREME web page that provides scale calibration and diagnostics procedures.

Weight: This data field shows the current weight reading from the scale. The weight will be the same as that displayed on the actual scale indicator.

Transaction Number: If a transaction is in progress, this data field will show the transaction number.

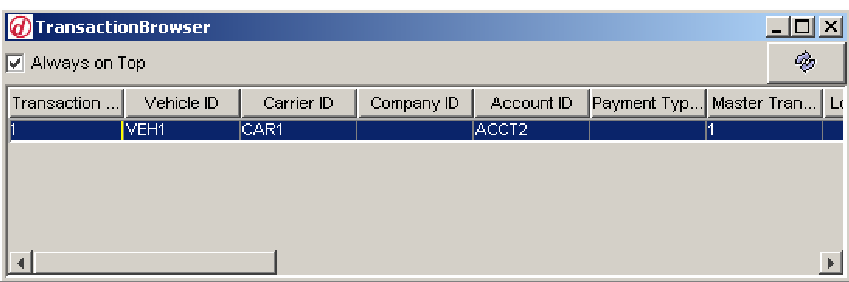
Vehicle: If a transaction is in progress, this data field will show the Vehicle ID that has been selected.

Push Buttons

Transaction Wizard: Click this button to open the transaction wizard. The transaction wizard is not available with the OverDrive 1st program.

Transaction Browser

Two-pass transactions require weighing a vehicle more than once. Usually the vehicle will leave the scale to be loaded or unloaded between weighings. When the vehicle returns to the scale to continue a transaction, the quickest way to retrieve the open transaction record is to use the transaction browser. To open the transaction browser, open the **Transactions** menu and click on the **Transaction Browser** menu item.



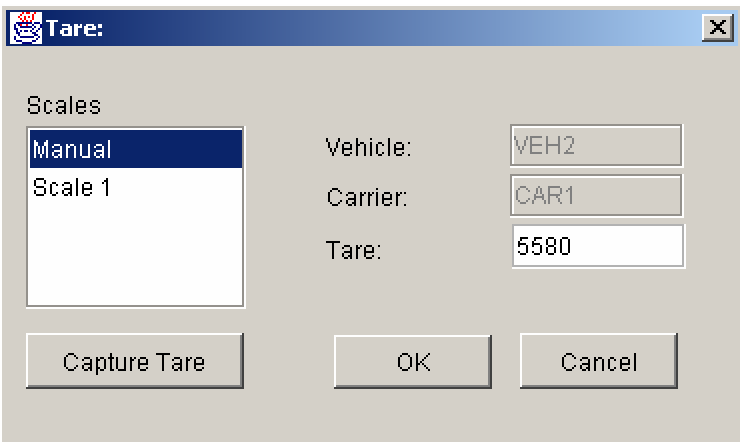
The transaction browser is a table that lists all open transactions. When a vehicle returns to a scale, double click on its record in the transaction browser to display the record on the **Transaction** screen. You can resize the browser, reposition it, and check the **Always on Top** box so that it will be displayed over top of other screens that are open. The transaction browser includes a **Refresh** button that is used to update the data listed in the browser. You will need to use this button if you leave the transaction browser open.

Capturing a Tare Weight

Use the **Capture Vehicle Tare** command to record a tare weight for a vehicle.

1. Select a vehicle in the **Vehicle** data field on the **Transaction** screen.
2. Use the **Carrier** data field to select the carrier linked to the vehicle.

3. Display the **Tare** window by clicking the **Capture Vehicle Tare** button on the tool bar or by selecting **Capture Vehicle Tare** in the **Transactions** menu. The vehicle and carrier will be displayed in the window.



4. In the **Scales** list box, highlight the scale on which the vehicle is being weighed.
5. If you are weighing the vehicle on a scale, click the **Capture Tare** button. The weight from the scale will be displayed in the **Tare** data field. If you select the **Manual** scale, type the weight in the **Tare** data field and then click the **Capture Tare** button.
6. Click the **OK** button to accept the tare weight, or click the **Cancel** button to close the **Tare** window without accepting a tare weight. If you accept a tare weight, it will be stored in the **Vehicle** table record.

Transient Vehicles

You can process transactions for transient vehicles. These are vehicles for which there is no database record in the **Vehicle** table. When you begin the transaction, you will have the option of creating a vehicle record or completing the transaction without adding the vehicle to the database.

1. When the vehicle arrives at the scale, highlight **(none)** in the **Vehicle** combo box on the **Transaction** screen. Type an ID or description of the vehicle so that it overwrites **(none)**.
2. If the carrier requirement is enabled, you will need to select a carrier.
3. When you move the cursor to the next data field, **the Transient Vehicle** window will open, displaying the following prompt: "This is a transient vehicle. Would you like to add it to database?" Respond by clicking one of the following buttons on the window:
   - **Yes**—This opens the **Vehicle** table. Enter information about the vehicle and save the new vehicle record. Then continue with the transaction.
   - **No**—This allows you to continue with the transaction.
   - **Cancel**—This cancels the transaction.

If you are processing a one-pass transaction for a transient vehicle, you will be prompted to enter a manual tare weight after the system has read the vehicle weight from the scale.

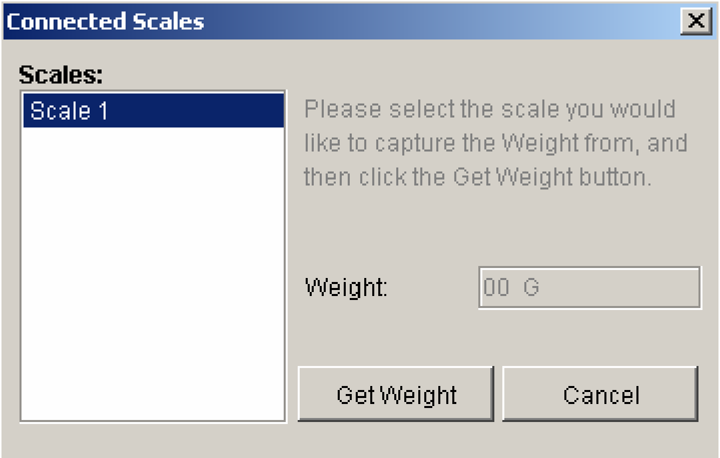
Transient Accounts

You can also process transactions for accounts that do not exist in the database. Highlight **(none)** in the **Account** combo box on the **Transaction** screen. Type an ID or description of the account so that it overwrites **(none)**. You will not be prompted to add the account to the database.

Switching Scales

You can process the first pass of a transaction on one scale and the second pass on another scale. If a truck pulls onto a scale to continue a transaction that was begun on a different scale, use the **Connected Scales** window to enter the weight.

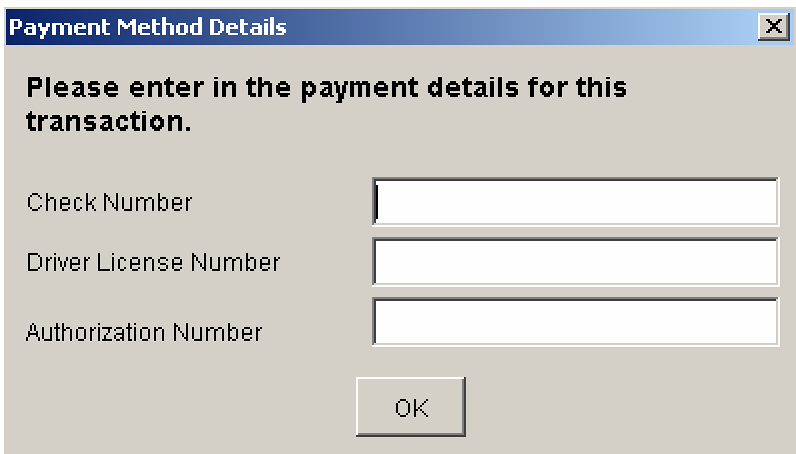
1. Click the **Show Scales** button on the **Transaction** screen to open the **Connected Scales** window.



2. Select the scale that the truck is currently on in the **Scales** List box.
3. The weight from the scale will be displayed in the **Weight** data field.
4. Click the **Get Weight** button to enter the weight for the transaction.

Payment Method

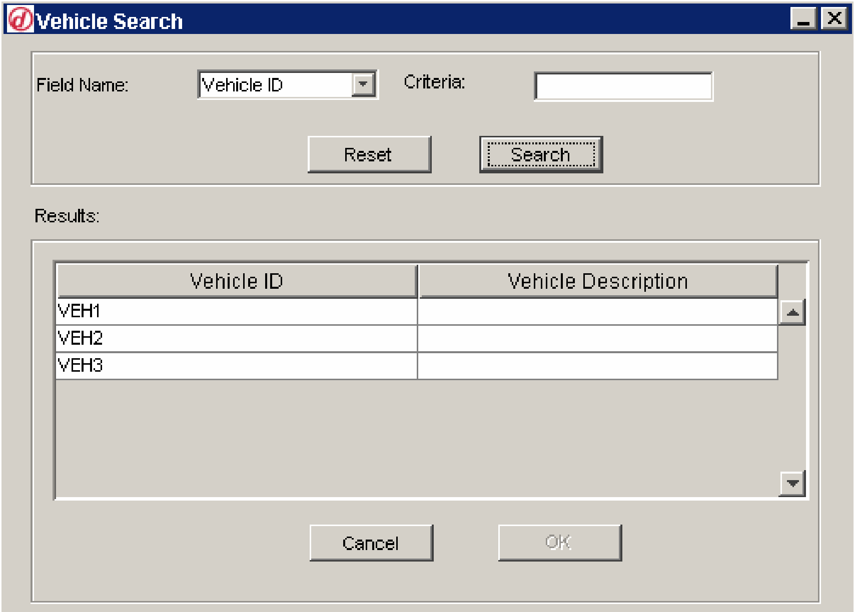
The program can prompt you to enter payment information for a transaction. The **Payment Method Details** window will open when you complete a transaction for which check, credit card, or debit card is selected as the payment type. Enter the appropriate payment details in the window, and then click the **OK** button to complete the transaction.



Search Function

The **Transaction** screen has a search function to help you locate database records more quickly. It allows you to search for records in the following combo boxes: Account, Carrier, Company, Container, Contract, Driver, Product, Trailer, and Vehicle.

1. Place the cursor in the data field that you want to search.
2. Press the F3 key to display the **Search** window.



3. Select the data field that you want to search in the **Field Name** combo box.
4. Enter the record that you want to find in the **Criteria** data field. Use a percent sign as a wildcard if you enter partial data. For example, enter "a%" or "%6" to search for Account6.
5. Click the **Search** button. The system will retrieve the records and display them in the **Results** table.
6. Highlight the desired record in the table, and then click the **OK** button. This will place the record in the data field on the **Transaction** screen.

If you click the **Search** button without selecting a field name, the system will retrieve the entire list of records for the data field.

You can also search a combo box by placing the cursor in the data field and typing the first letter(s) of a data record. A time-out feature automatically starts a new search if a set amount of time elapses between keystrokes.

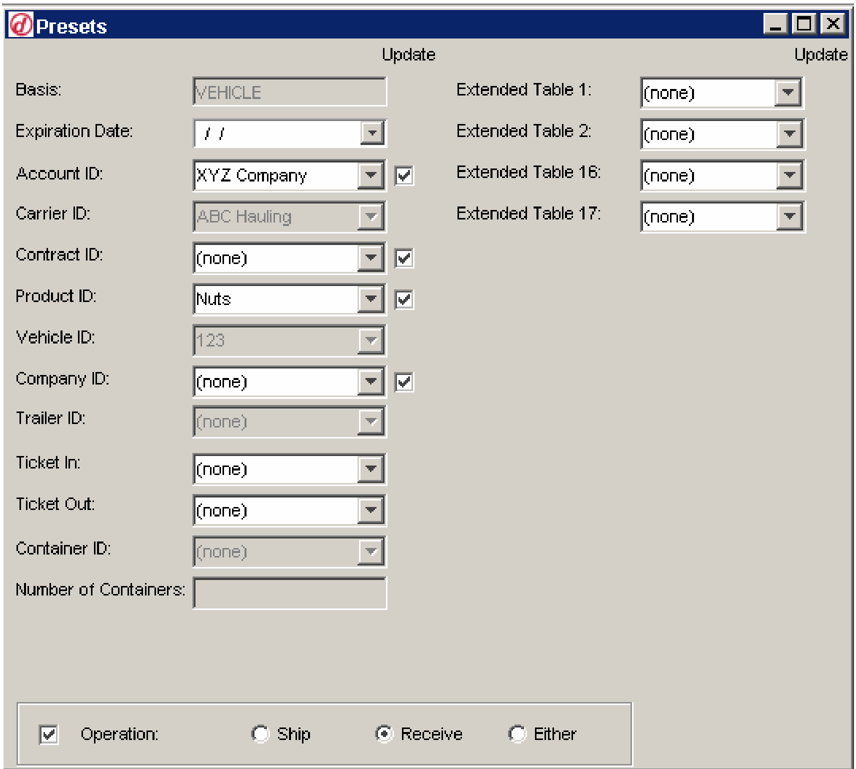
6 Presets

Presets

Presets are used to speed up transactions by reducing repetitive, manual data entry. Suppose a vehicle always carries the same product for the same account. You can create a preset that links the vehicle to the account and product. Then when you select the vehicle for a transaction, the system will automatically enter the account and product information.

To create a preset, choose a database record as the starting point. A **Vehicle** table record is usually the best choice. But you can use a record from any of the following tables: Account, Carrier, Company, Container, Contract, Product, Trailer, Vehicle, and Extended tables.

1. Decide which record you want to use as a starting point, and open the table where the record is stored. For example, if you want to use a vehicle record as the starting point, open the **Vehicle** table.
2. Display the desired record on the table's **Form View** tab.
3. Click the **Presets** button to open the **Presets** screen.
   - The ID for the record that you chose as a starting point will appear in the appropriate data field.
   - The name of the table where the record is stored will appear in the **Basis** data field.

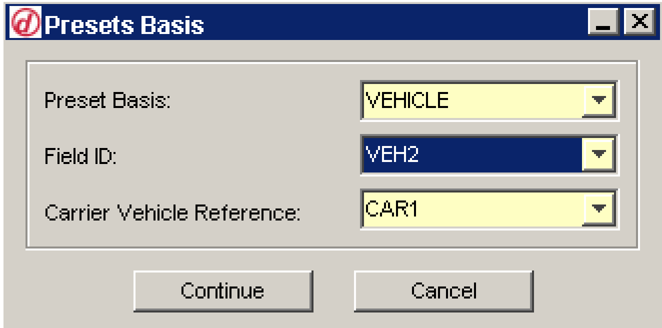


4. Use the combo boxes to select the records that you want to include in the preset.
5. Click the **Save** button to save the presets record.

NOTE: All records that you are including in the preset must already exist in the database.

The **Presets** screen for the **Vehicle** table includes an **Update** check box for each data field. Checking the box enables you to change the preset by overriding it manually during a transaction. For example, suppose you are processing a transaction and select a vehicle for which you have assigned a preset product. The preset product will be entered automatically, but you can override it manually by selecting another product on the **Transaction** screen. If the **Update** box is checked, the product that was selected manually will become the new preset and will be used for subsequent transactions. If the box is not checked, the product that was selected manually will be used only for the current transaction.

The **Presets Basis** form provides a shortcut to the **Presets** screen. To open the form, click on **Presets Basis** in the **Data Setup** folder in the side tree.



1. Use the **Presets Basis** combo box to select the database table that contains the record being used as the basis for the preset.
2. Use the **Field ID** combo box to select the specific record being used as the basis for the preset. If a vehicle record is selected, the carrier linked to it will be shown in the **Carrier Vehicle Reference** field.
3. Click the **Continue** button to open the **Presets** screen.

Using Presets

1. Open the **Transaction** screen to begin processing a transaction.
2. In the appropriate combo box, select the record that was used as the starting point for the preset.
3. The preset information will be entered automatically in the data fields on the **Transaction** screen. You can override the presets manually.

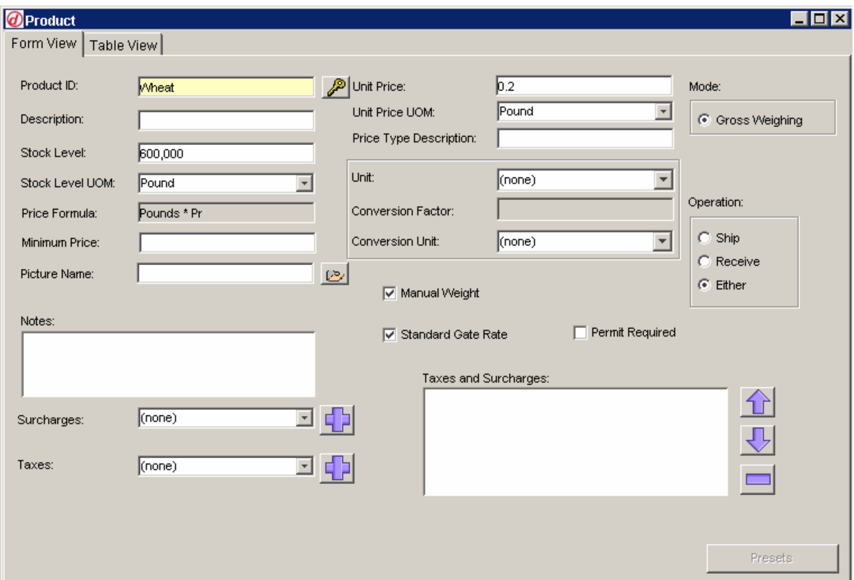
If a vehicle record is the basis for the preset, you will need to select the vehicle and carrier before the presets will be entered.

By default, the system will change a preset if you override it manually during a transaction. For example, suppose you are processing a transaction and select a vehicle for which you have assigned a preset product. The preset product will be entered automatically, but you can override it manually by selecting another product on the **Transaction** screen. The product that was selected manually will become the new preset and will be used for subsequent transactions. The following data fields are affected by this function: Account, Company, Contract, Operation, and Product.

7 Pricing

Basic Pricing

The OverDrive 1st system can calculate a price when it processes a transaction. The simplest way to do that is to use the basic pricing formula that is available for each product. You can specify a price when you create a record in the **Product** table.



1. Enter a price in the **Unit Price** data field.
2. Select a unit of measure in the **Unit Price UOM** combo box. This unit indicates how the price will be applied: per weight unit, per volume unit, per piece, or per load.
3. The **Price Formula** data field will show the basic price formula for the product (for example, Pounds * Pr).

You can also specify basic pricing for a contract, using the **Contract Product** table. If you create a contract for a product, the price specified in the product record cannot be used unless the **Standard Gate Rate** box is checked. See the description of the standard gate rate in the **Product** table section of Chapter 4.

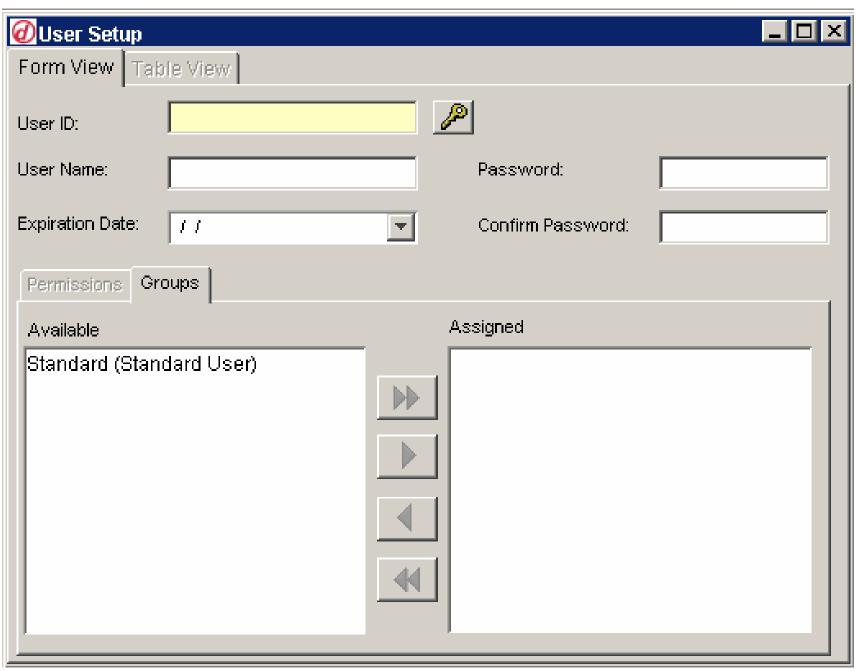
8 Setting Up Users

Security Setup

Each person who uses the OverDrive system will need to enter a user name and password to log in. To open the **User Setup** screen, click on **User Setup** in the **Application Setup** folder.

User Setup

From the **Form View** tab on the **User Setup** screen, you can set up users and assign passwords for them. To set up a user, fill in the data fields and then click the **Save** button. All users will automatically be assigned the default (Standard) permissions. You cannot assign other user's groups or permissions with the OverDrive 1st program. You cannot delete user records or query them.



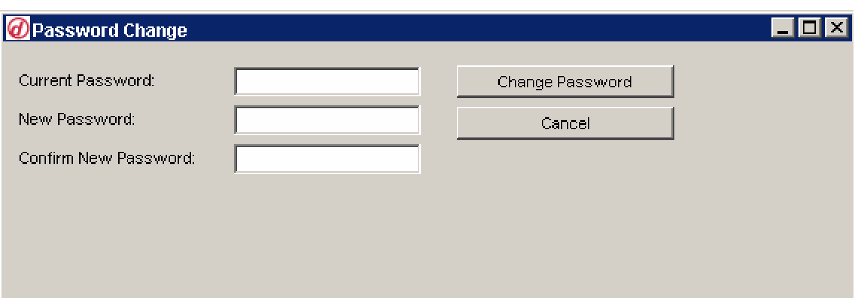
Data Fields

User ID:	Enter an ID for the user.
User Name:	Enter a name for the user. The user will need to enter this name exactly as it is spelled here when logging in to the system.
Expiration Date:	Use the calendar in the combo box if you want to select a date when the user's authorization to log in to the system will expire.
New Password:	Enter the password that the user will need to enter when logging in to the system.
Confirm Password:	Enter the password that was typed in the **New Password** data field.

NOTE: Passwords are case sensitive.

Changing Passwords

Once a password has been assigned for a user, the user can change it at any time from the **Password Change** screen. To open the **Password Change** screen, click on **Password Change** in the **Application Setup** folder.



1. Enter the current password in the **Current Password** data field.
2. Enter the new password in the **New Password** data field.
3. Enter the new password in the **Confirm New Password** data field.
4. Click the **Change Password** button to change the password, or click the **Cancel** button to cancel the password change.

9 Managing Transaction Records

Transaction Maintenance

The OverDrive 1st system automatically creates a record of each transaction that you process. Using the **Transaction Maintenance** screen, you can search the database for transaction records to view them or to modify the information stored in them. To open the **Transaction Maintenance** screen, click on **Transaction Maintenance** in the **Data Setup** folder.

The current status of each transaction is indicated by the following status codes:

C Completed transactions

I Incomplete transactions: Two-pass transactions for which the final pass has not been completed.

M Modified transactions

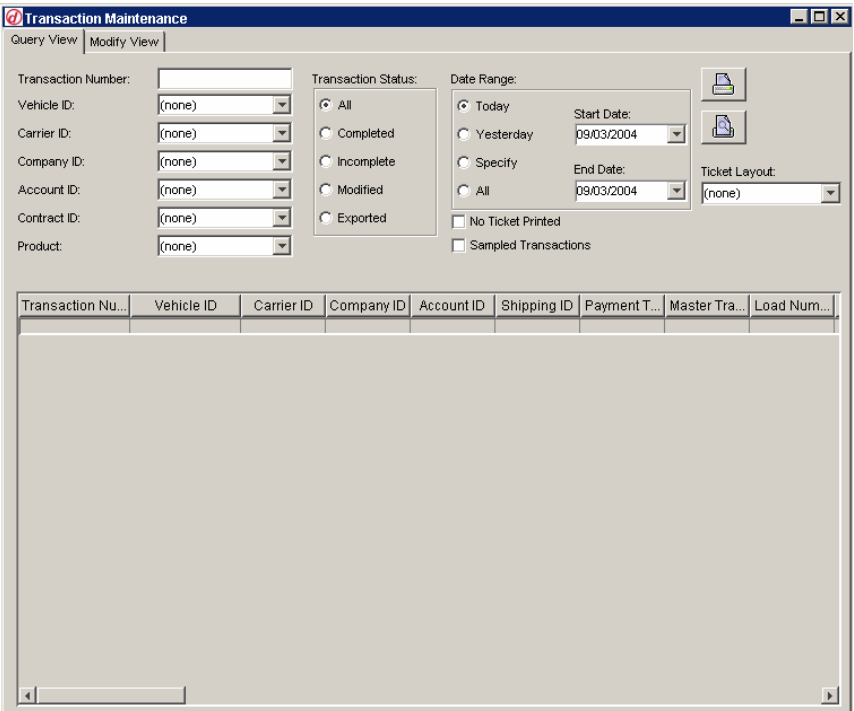
V Voided transactions

X Exported transactions

To view the status code for a transaction, display the transaction record on the **Query View** tab. The table where the records are displayed includes a **Status** column.

Query View

Use the **Query View** tab to search the database for transaction records. The data fields, radio buttons, and check boxes on the tab function as filters. If you set filters, a query will retrieve only those transactions that meet the specifications of the filters. To retrieve all transactions, make sure that no filters are set and make sure the **Transaction Status** and **Date Range** radio buttons are set to **All**.



A query involves the following steps:

1. Select filters to define the query.

2. Click the **Query** button.
3. The transactions that match the query specifications will be displayed in the table at the bottom of the **Query View** tab.

The filters interact with one another, so make sure that all filters are set correctly. If you perform a query and do not get the results that you expected, check the filter settings and try again. Note that the default date range setting is **Today**. To search for earlier transactions, you will need to change the setting.

Transaction Number

To search for a specific transaction number, enter it in the **Transaction Number** data field. Make sure that none of the other filter settings exclude the transaction number, and then click the **Query** button to retrieve the record.

ID Combo Boxes

You can search for transactions processed for a specific vehicle, carrier, company, account, contract, or product. Select the desired ID from one of the five combo boxes. You can specify more than one type of ID. For example, you can select an Account ID and a Product ID to search for transactions in which a specific account bought/sold a specific product.

Transaction Status

Use the **Transaction Status** radio buttons to search for transactions that belong to one of the following status groups:

- **All** – All transactions.
- **Completed** – Completed transactions only.
- **Incomplete** – Incomplete transactions only.
- **Modified** – Modified transactions only.
- **Exported** – Exported transactions only.

Date Range

Use the **Date Range** radio buttons to search for transactions processed during a specific time period:

- **Today** – Transactions processed today (this is the default selection).
- **Yesterday** – Transactions processed yesterday.
- **Specify** – Transactions processed during a specified time period. Use the calendar in the **Start Date** combo box to select the starting date for the period. Use the calendar in the **End Date** combo box to select the ending date for the period.
- **All** – All transactions.

No Ticket Printed

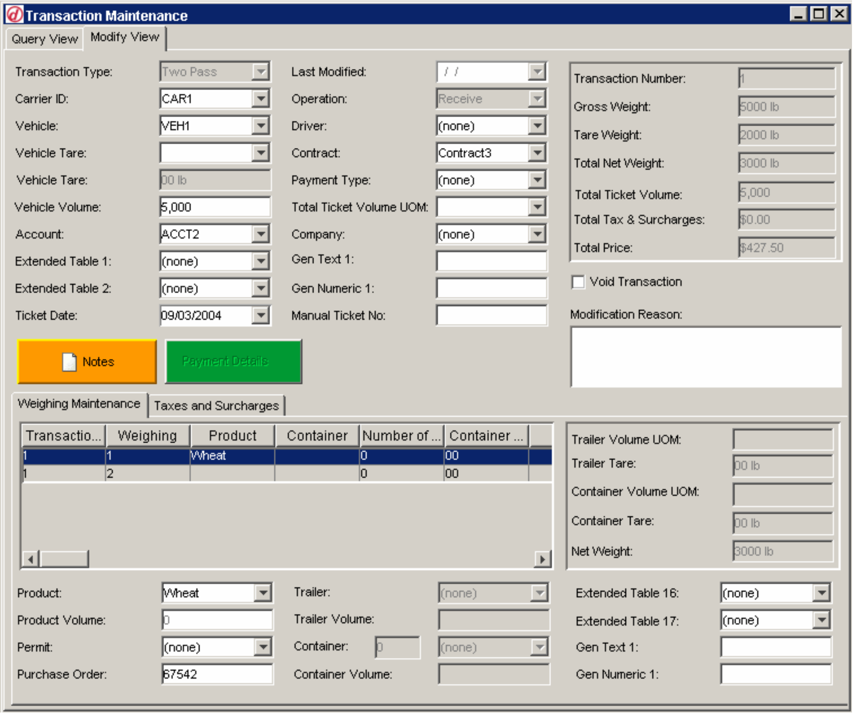
Check this box to limit a search to transactions for which no ticket was printed.

Ticket Layout

You can print or view ticket layouts. Select a layout in the **Ticket Layout** combo box, and then click the **Print** button to print a copy of the layout or click the **Print Preview** button to view the layout.

Modify View

The **Modify View** tab is used to view an existing transaction record and make changes to it. You will need to perform a query to locate the record before you can modify it.



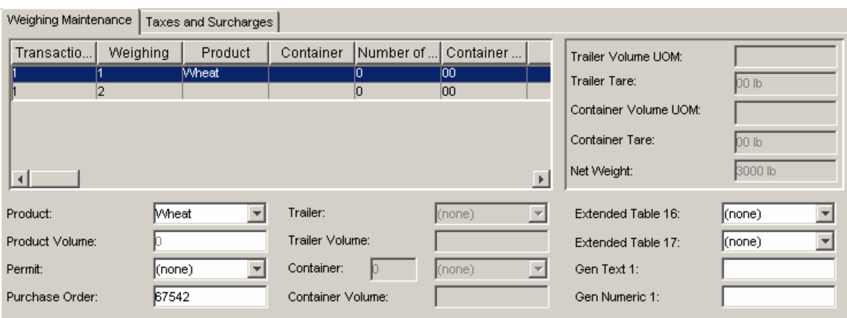
1. Use the **Query View** tab to locate a transaction record.
2. Highlight the transaction record in the table on the **Query View** tab.
3. Click the **Modify View** tab. The transaction data will be displayed on the tab.
4. Modify the transaction record by changing selections in the combo boxes and entering new data in the data fields. You can also modify data on the tabs at the bottom of the screen.
5. Enter a reason for the changes in the **Modification Reason** data field. You will not be able to save the changes unless you enter a modification reason. The system will automatically record the name of the operator who was logged in when the record was modified.
6. Click the **Save** button to save the modified transaction to the database.

Transaction type cannot be modified. Some data fields cannot be modified manually, for example, the **Vehicle Tare** field. The data displayed in that field is read from the **Vehicle** table record, so the only way to modify it is to select a new Vehicle ID or change the data stored in the **Vehicle** table record.

To void a transaction, check the **Void Transaction** box. The original transaction record will remain in the database (its status will be changed to **V**). If you change a Vehicle ID, Account ID, Contract ID, or Product ID, the transaction will be voided regardless of whether this box is checked or not. The original transaction record will remain in the database (its status will be changed to **V**), and the system will create a new transaction record (its status will be **M**). It will have a new transaction number but the same master transaction number as the original transaction.

Weighing Maintenance Tab

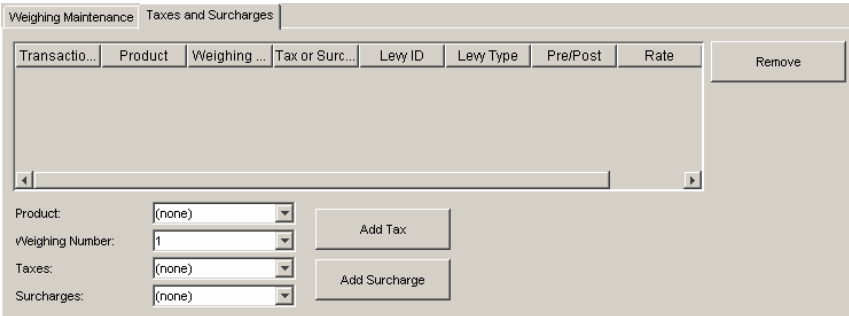
This tab displays data from the **Transaction** screen's **Product Detail** tab. All fields that cannot be modified manually will be disabled.



Two-pass transactions can include separate data entries for each pass. To switch between those entries, click the right or left arrow button on the **Modify View** tab.

Taxes and Surcharges Tab

This tab is used to modify taxes and surcharges applied to a transaction.



Adding a Tax

1. Select a Product ID in the **Product ID** combo box. If more than one product is involved in a transaction, you will need to apply the appropriate tax to each product. If more than one weighing is involved, apply the tax to each weighing.
2. Select the tax in the **Taxes** combo box.
3. Click the **Add Tax** button.
4. The tax information will be listed in the table on the **Taxes and Surcharges** tab.

Adding a Surcharge

1. Select a Product ID in the **Product ID** combo box. If more than one product is involved in a transaction, you will need to apply the appropriate surcharge to each product. If more than one surcharge is involved, apply the surcharge to each weighing.
2. Select the surcharge in the **Surcharges** combo box.
3. Click the **Add Surcharge** button.
4. The surcharge information will be listed in the table on the **Taxes and Surcharges** tab.

Deleting Taxes and Surcharges

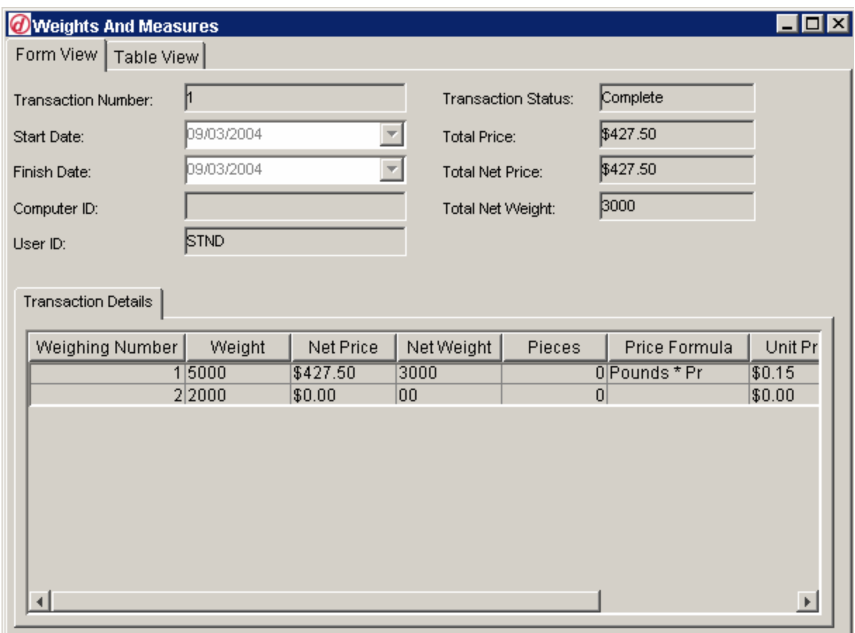
1. Highlight the tax or surcharge that you want to delete in the table on the **Taxes and Surcharges** tab
2. Click the **Remove** button.

Weights and Measures

The Weights and Measures log file stores a record of every transaction. These records are intended for Weights and Measures certification, so they are permanent records that cannot be changed or deleted. To view the file, open the **Weights and Measures** screen from the side tree.

Form View

Use the **Form View** tab to search the database for transaction records. The data fields on the tab function as filters. If you enter a filter, a query will retrieve only those transactions that meet the specifications of the filter. To retrieve all transactions, make sure that all data fields are empty.



A query involves the following steps:

1. Enter filters to define the query.
2. Click the **Query** button.

3. The first transaction that matches the query specifications will be displayed on the **Form View** tab. To view all transactions retrieved by the query, select the **Table View** tab.

The filters interact with one another, so make sure that all filters are set correctly. If you perform a query and do not get the results that you expected, check the filter settings and try again. Note that the filters are case sensitive.

Data Fields

Transaction Number: This data field shows the transaction number that is assigned when a transaction is processed. When you perform a query, you can retrieve a specific transaction record by entering the transaction number as a filter.

Start Date and Finish Date: When a transaction record is displayed, the **Start Date** data field shows the date on which the transaction was started and the **Finish Date** data field shows the date on which the transaction was completed. You can also use the calendars in the combo boxes to select a start date and a finish date as filters for a query:

- When you select a start date only, the query will retrieve transactions that were started on that date.
- When you select a finish date only, the query will retrieve transactions that were completed on that date.
- When you select both a start date and a finish date, the query will retrieve all transactions processed between the two dates.

Computer ID: This data field shows the ID for the computer on which the transaction was processed.

User ID: This data field shows the ID for the user who processed the transaction. The User ID is stored in the **Security Setup** screen. You can enter a User ID as a filter for a query.

Transaction Status: This data field shows the status of the transaction. You can enter a transaction status as a filter for a query.

Total Price: This data field shows the total price for the transaction, including taxes and surcharges. You can enter a total price as a filter for a query.

Total Net Price: This data field shows the total net price for the transaction. You can enter a total net price as a filter for a query.

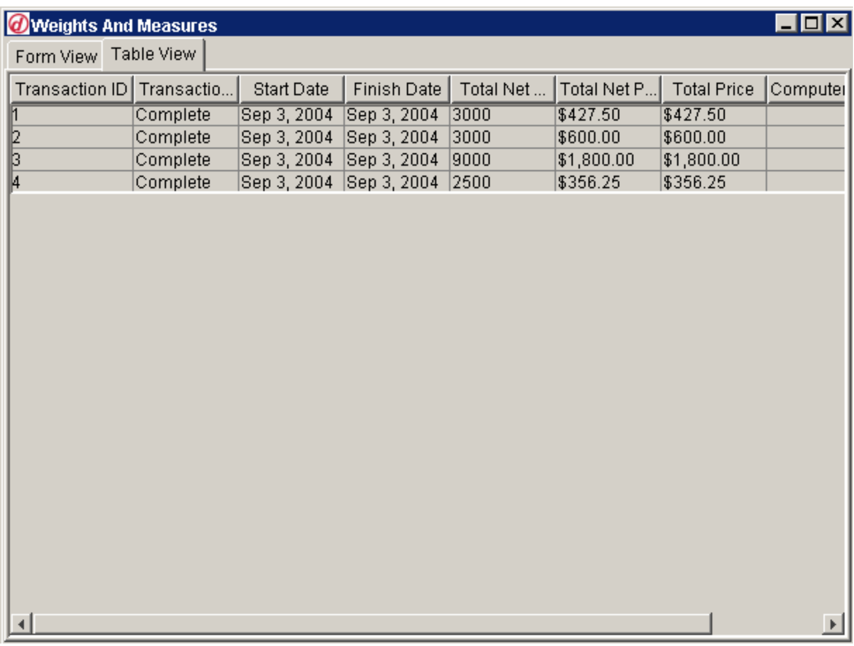
Total Net Weight: This data field shows the total net weight for the transaction. You can enter a total net weight as a filter for a query.

The **Transaction Details** table at the bottom of the **Form View** tab displays the data recorded for each weighing of a transaction. For example, when you retrieve the record for a two-pass transaction, the data for each pass will be shown on a separate line.

You can print a copy of a transaction record that is displayed on the **Form View** tab by clicking the **Print** button.

Table View

This tab displays all the transaction records that are retrieved when you perform a query. Highlighting one of the transactions in the table will display the transaction record on the **Form View** tab.



Transaction ID	Transactio...	Start Date	Finish Date	Total Net ...	Total Net P...	Total Price	Compute
1	Complete	Sep 3, 2004	Sep 3, 2004	3000	$427.50	$427.50	
2	Complete	Sep 3, 2004	Sep 3, 2004	3000	$600.00	$600.00	
3	Complete	Sep 3, 2004	Sep 3, 2004	9000	$1,800.00	$1,800.00	
4	Complete	Sep 3, 2004	Sep 3, 2004	2500	$356.25	$356.25	

10 Reports and Tickets

Introduction

The system includes a selection of standard report and ticket formats. A report compiles information from the database. A ticket prints information about an individual transaction.

Printing Tickets

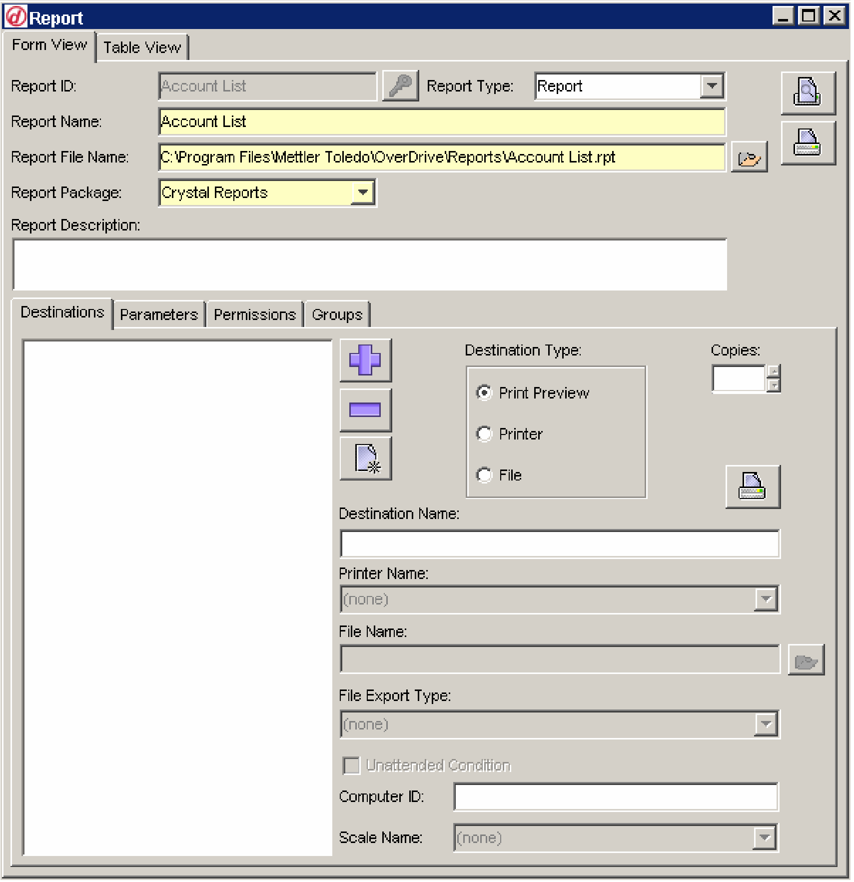
The system can print a ticket automatically for each transaction. In order to do that, you will need to select a ticket format for each account:

- To select a ticket format, open the **Account** table. On the **Form View** tab, you will see a **Ticket In** combo box for selecting an inbound ticket format and a **Ticket Out** combo box for selecting an outbound ticket format. You can select formats for either or both combo boxes. If you do not wish to print a ticket, select **(none)**. When you specify a ticket format for an account, you are instructing the system to print tickets for that account. If you want to print tickets for all accounts, you will need to specify a ticket format for each account record.

Report Screen

The **Report** screen is used to view an existing report/ticket or to create a new report/ticket format.

- To retrieve existing reports and tickets, select **Report** or **Ticket** in the **Report Type** combo box and then click the **Query** button. Data entered in any of the fields will act as a filter. All records that are retrieved will be listed on the **Table View** tab.



Data Fields

Report ID: Each report or ticket must have a unique alphanumeric identifier. To create a new record, type an ID in the data field or click the **Get System Generated Key** button to have the system assign an ID.

Report Type: Use the combo box to select the type of document: **Report** or **Ticket**.

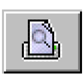
Report Name: A name assigned to the report or ticket.

Report File Name: The file name and directory location for the report or ticket. When creating a report or ticket, click the **Browse** button to open a window that will allow you to enter a file name and select a location.

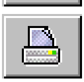
Report Package: The software package used to create the report or ticket. The standard software is Crystal Reports.

Report Description: A description of the report or ticket.

The buttons on the right-hand side of the screen are used to open, view, and print reports and tickets:



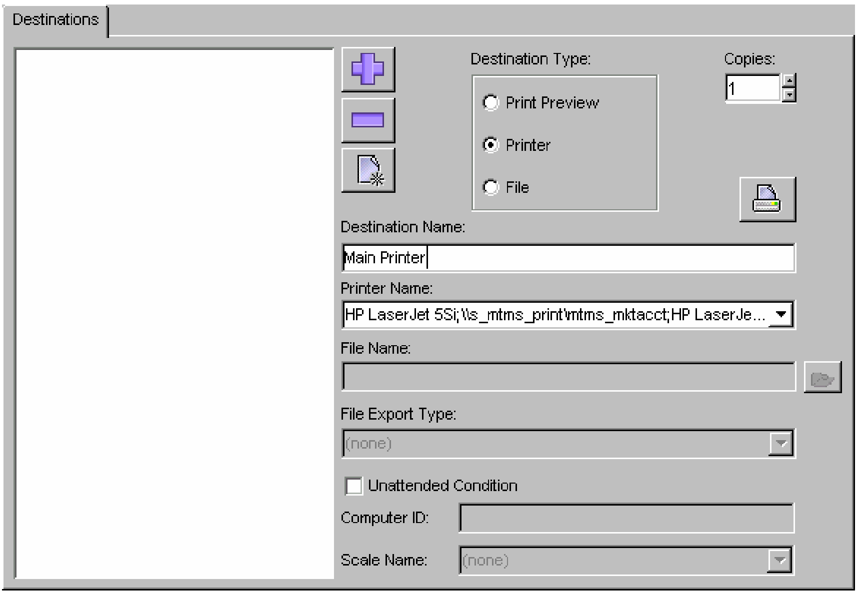
- The **Print Preview** button opens a window that displays a preview of the report or ticket.



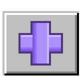
- The **Print** button prints a copy of the report or ticket.

Destinations

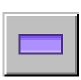
The **Destinations** tab lets you specify destinations for printing a report/ticket or for creating a file.



1. Display the report or ticket in the **Report ID** data field at the top of the **Report** screen.



2. Fill in the data fields to specify a destination, and then click the **Add** button to add the destination to the list box. You can add more than one destination. Simply click the **Clear** button to clear the data fields and then specify another destination.
3. Click the **Save** button on the tool bar.



To delete an item from the list box, highlight it and then click the **Remove** button.

Data Fields

Destination Type:	Use the radio buttons to select how you want to output the report/ticket: **Print Preview**, **Printer**, or **File**. **Print Preview** displays the report/ticket on the computer screen, **Printer** sends a print command to a Windows-compatible printer, and **File** creates an electronic file.
Copies:	Enter the number of copies that you want to print. This field is used only if **Printer** is selected as the destination type.

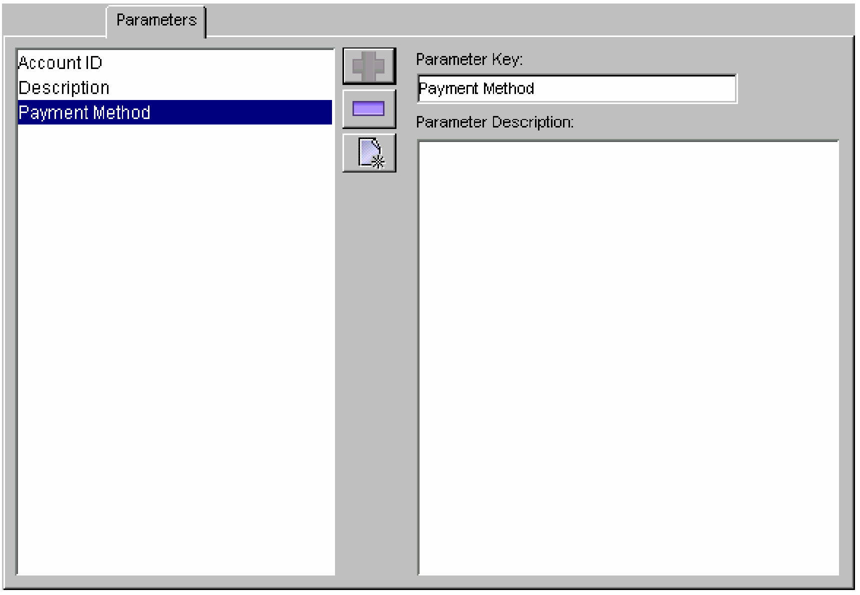
Destination Name:	Enter a name for the destination record that you are creating.
Printer Name:	If the destination type is **Printer**, select the printer to which you want to send the document. You can select a local or network printer.
File Name:	If the destination type is **File**, click the **Browse** button to select a directory location for the file that will be created.
File Export Type:	If the destination type is **File**, select the type of file that you want to create.

After you have defined a destination for a report/ticket, you can use the **Print** button to send the report/ticket to the destination. Highlight the destination name in the list box, use the radio buttons to select a destination type, and then click the **Print** button. If a destination is not selected, clicking the button will display a print preview.

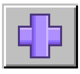
Parameters

The **Parameters** tab lets you specify the parameters to be included in the report or ticket. Parameters correspond to the data fields on the **Transaction** screen and **Data Setup** tables (for example, **Transaction Number** and **Product ID**).

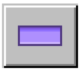
CAUTION: Do not change the parameters unless you are familiar with Crystal Reports and how to use it to set parameters.



1. Display the report or ticket in the **Report ID** data field at the top of the **Report** screen.
2. Enter the name of the parameter (for example, **Transaction Number** or **Product ID**) in the **Parameter Key** data field.
3. Enter a description of the parameter in the **Parameter Description** data field.



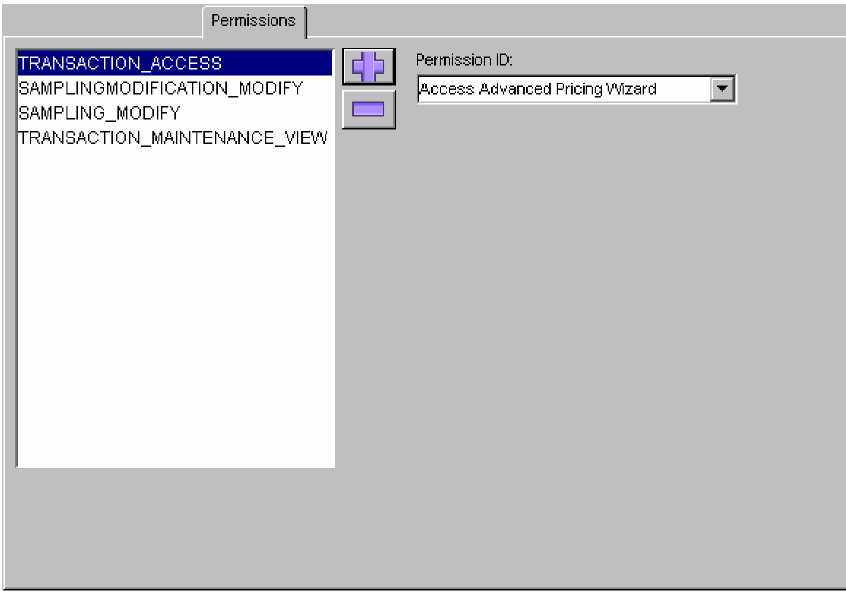
4. Click the **Add** button to add the parameter to the list box. You can add more than one parameter. Simply click the **Clear** button to clear the data fields and then specify another parameter.
5. Click the **Save** button on the tool bar.



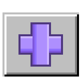
To delete an item from the list box, highlight it and then click the **Remove** button.

Permissions

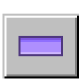
The **Permissions** tab lets you limit access to a report or ticket by linking it to the user's permissions specified on the **Security Setup** screen. When you select a permission from the **Permission ID** combo box, you limit access to the report/ticket to users who have that Permission ID assigned to them. NOTE: User's permissions are not available with the OverDrive 1st program.



1. Display the report or ticket in the **Report ID** data field at the top of the **Report** screen.
2. Add permissions to the list box on the **Permissions** tab. Select a permission from the **Permission ID** combo box, and then click the **Add** button to add it to the list box. You can add more than one permission to the list box.



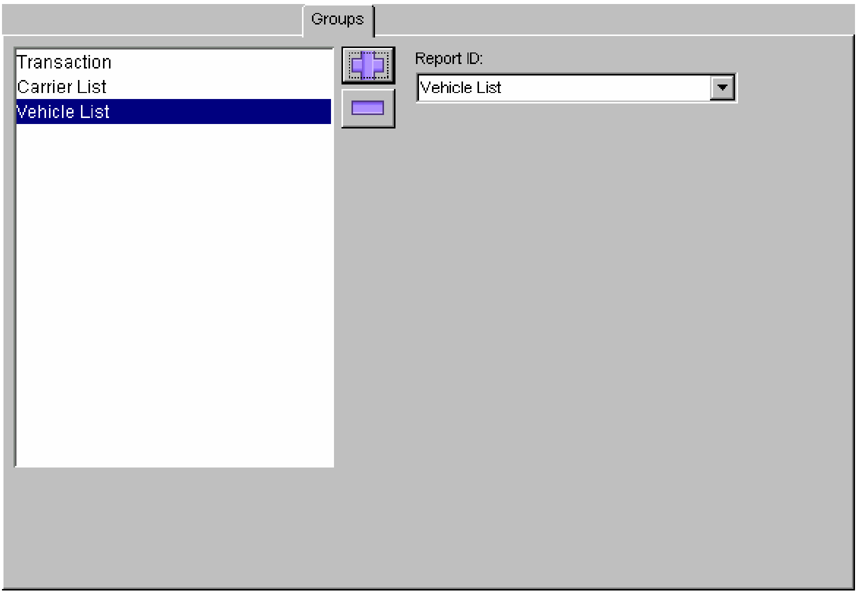
3. Click the **Save** button on the tool bar.



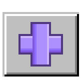
To delete an item from the list box, highlight it and then click the **Remove** button.

Groups

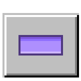
The **Groups** tab lets you can create a group of reports/tickets that will act as a subset of another report or ticket. When you print a copy of the main report or ticket, the reports/tickets in the subset will automatically be printed along with it.



1. Display the main report or ticket in the **Report ID** data field at the top of the **Report** screen.



2. Add the members of the subset group to the list box on the **Groups** tab. Select a report from the **Report ID** combo box, and then click the **Add** button to add it to the list box. You can add more than one report to the list box.
3. Click the **Save** button on the tool bar.



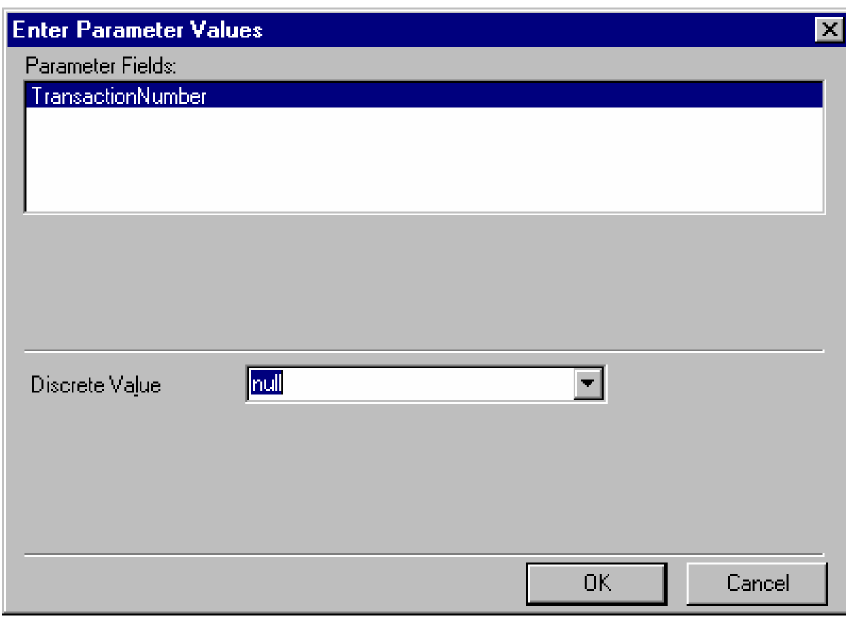
To delete an item from the list box, highlight it and then click the **Remove** button.

Printing

You can print reports and tickets from the **Report** screen.

1. Select **Report** or **Ticket** in the **Report Type** data field.

2. Click the **Query** button to retrieve a list of reports or tickets.
3. Select the report or ticket that you want to print. You can use the arrow buttons on the tool bar to scroll through a list or switch to the **Table View** tab and highlight the desired item.
4. Click the **Print** button (or click the **Print Preview** button to view the report/ticket on the computer screen).
5. If a parameter is required, the **Enter Parameter Values** window will open. Enter a parameter in the **Discrete Value** data field (or enter a date range), and then click the **OK** button.
   - **Reports:** You must enter a date for some reports.
   - **Tickets:** You must enter a transaction number for transaction tickets.



Standard Reports

Report Name	Fields Included
Account List	Account, Description, Contact, Phone, Credit Limit, Credit Balance
Account Summary	Account, Description, Load #, Load %, Wt., Wt. %, Volume, Volume %, Cost, Cost %
Account Summary by Product	Account, Product, Loads, Wt., Units, Total Cost
Carrier List	Carrier, Description, Address, City, State, Zip
Cash Report	Transaction #, Account, Product, Payment Method, Date, Payment Amount
Company List	Company, Description, Address, City, State, Zip
Container List	Container, Description, Volume, Volume Unit, Tare Wt.
Contract Information	Contract, Description, Discount, Product, Price, Contract Wt., Current Wt., Account
Customer Product	Product, Account, Transaction #, Date, Wt., Fees, Taxes, Total Price
Daily Ticket Report	Date, Ticket #, Account, Carrier, Vehicle, Product, Time In, Time Out, Wt., Units, UOM, Revenue
Driver List	Driver ID, Name, License #
Peak Graph Report	Hourly traffic by loads and weight
Permit List	Permit, Description, Issuing Authority, Product, Expiration Date
Product List	Product, Description, Stock Level, Unit Price, Minimum Price
Product Summary	Product, Description, Load #, Load %, Wt., Wt. %, Volume, Volume %, Cost, Cost %
Tare Expiration Report	Carrier, Vehicle, Tare Date, Expiration Date, Tare Wt., Scale ID
Trailer List	Trailer, Description, Volume, VIN, Tag #, Expiration Date
Vehicle List	Vehicle, Description, Carrier, Volume, Minimum Wt., Maximum Wt., Tag #, Tag Expiration Date
Vehicle Tare	Carrier, Vehicle, Tare Date, Expiration Date, Tare Wt., Scale ID
Void Ticket Report	Transaction #, Date/Time Out, Wt., Cost, Reason/User

Standard Tickets

Ticket Name	Fields Included
Standard Ticket	Transaction #, Scale ID, Date, Time In, Time Out, Gross Wt., Tare Wt., Net Wt., Account, Carrier, Trailer, Container, PO#, Product, Quantity, Measure, Rate, Amount, Taxes, Fees

11 Database Import/Export Wizard

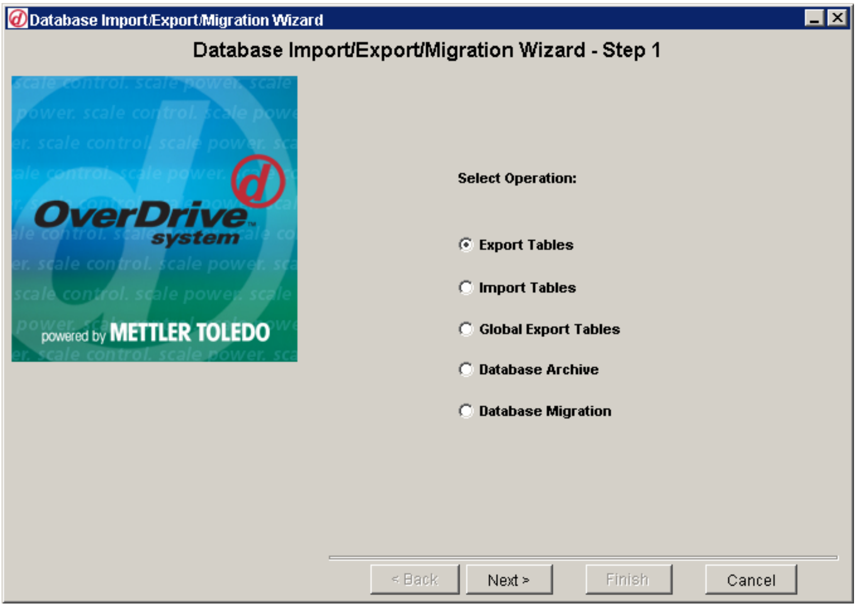
Introduction

The Database Import/Export Wizard is used to import information to or export information from the system's database. You can limit the data to be exported to specific tables, specific columns from each table, and specific data entries (for example, a specific Product ID).

Export

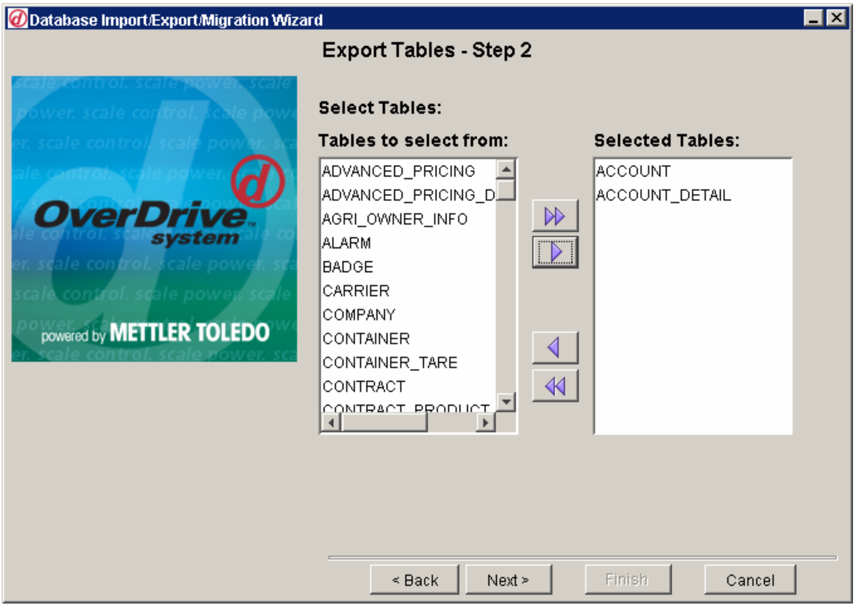
This operation exports individual tables or portions of tables from the database (the data is copied, not removed from the database). To begin the export procedure, select **Database Import/Export/ Migration Wizard** from the **Wizards** folder in the side tree.

Step 1



1. Select the **Export Tables** radio button from the list of operations.
2. Click the **Next** button.

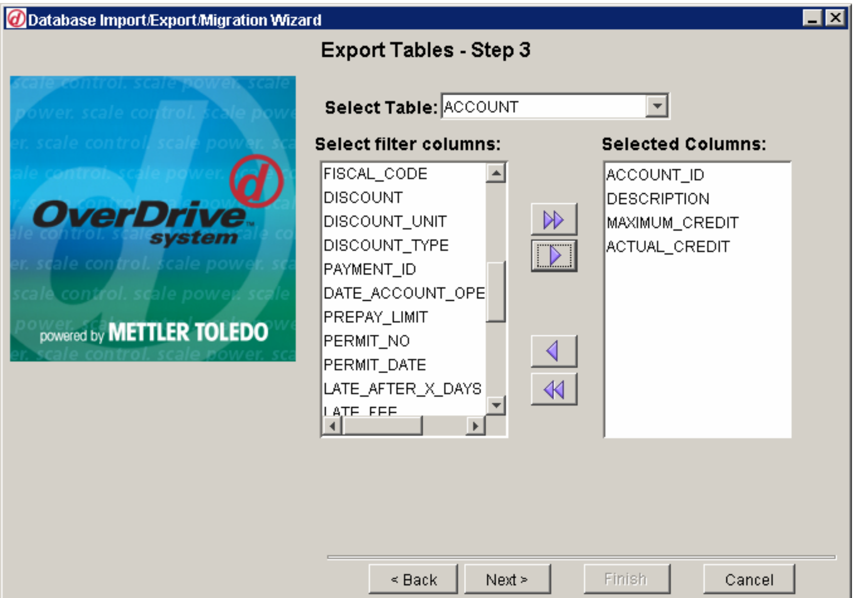
Step 2



Select the tables that you want to export. All of the tables contained in the database are listed in the **Tables to select from** list box on the left.

1. Move the tables that you want to export to the **Selected Tables** list box on the right. Use the arrow keys to move tables from one list box to the other.
2. When the tables that you want to export are displayed in the **Selected Tables** list box, click the **Next** button.

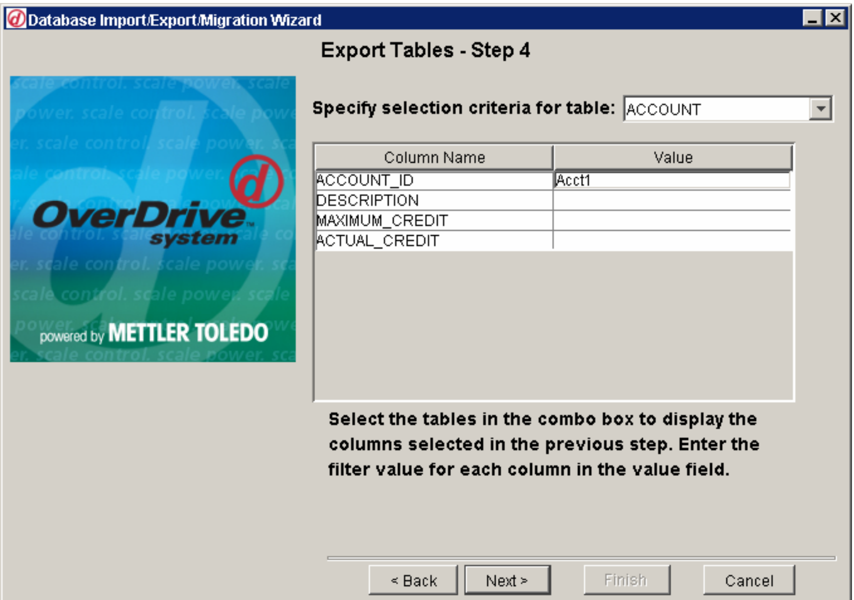
Step 3



The filters in Steps 3 and 4 are used to select data from individual columns (fields). For example, you can export data for accounts located in a specific state. Select only the columns for which you want to specify a filter. Step 5 is used to select the columns that will be exported.

1. Select the first table in the **Select Table** combo box. That will display all of the table's columns in the **Select filter columns** list box on the left.
2. If you want to select a filter for a column, move the column to the **Selected Columns** list box on the right. Use the arrow keys to move columns from one list box to the other.
3. When you have selected the desired columns for each table in the combo box, click the **Next** button.

Step 4

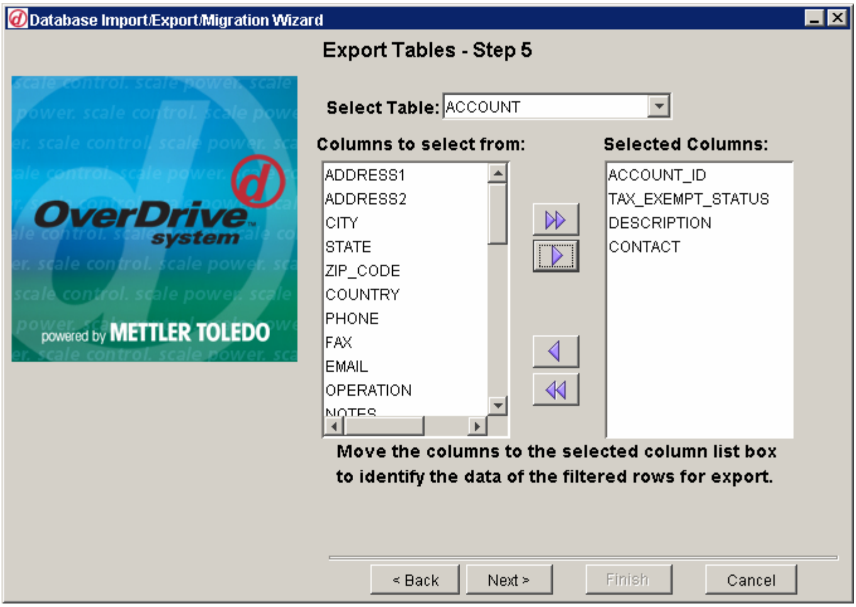


This step allows you to specify a filter for each of the columns selected in the previous step.

1. Select the first table in the **Specify selection criteria for table** combo box. The columns selected in the previous step will be listed in the table below the combo box.
2. For each column name, enter the appropriate data in the **Value** column. For example, if you have selected the Product ID column from the **Product** table, enter a specific Product ID as the value.
3. When you have entered all the values, click the **Next** button.

NOTE: Use the following format for date fields: YYYY-MM-DD. To select all records processed before a given date, use a less-than sign (<YYYY-MM-DD). To select all records processed after a given date, use a greater-than sign (>YYYY-MM-DD).

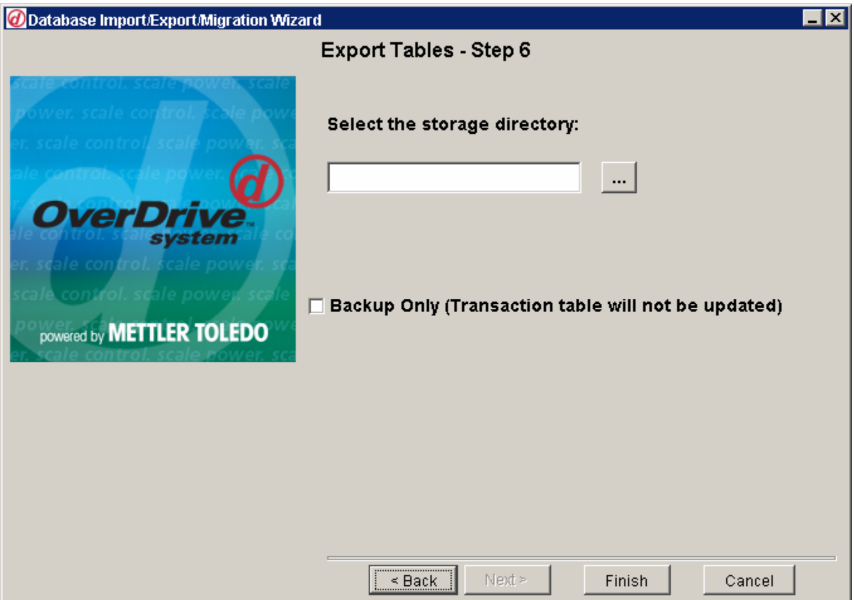
Step 5

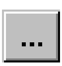


Select the columns that you want to export from each table.

1. Select the first table in the **Select Table** combo box. That will display all of the table's columns in the **Columns to select from** list box on the left.
2. Move the columns that you want to export to the **Selected Columns** list box on the right. Use the arrow keys to move columns from one list box to the other.
3. When you have selected columns for each of the tables in the combo box, click the **Next** button.

Step 6



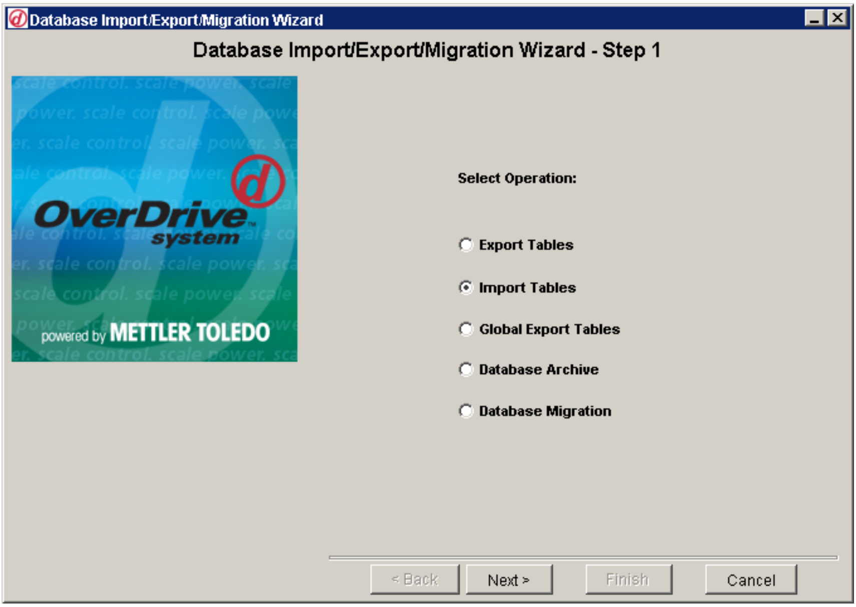


1. Select the directory to which you want to export the database information. Type the directory location in the **Select the storage directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. Check the **Backup Only** box if you are exporting data to back up your system. If the box is not checked, the transaction status will be changed to exported (X).
3. Click the **Finish** button to export the data.

Import

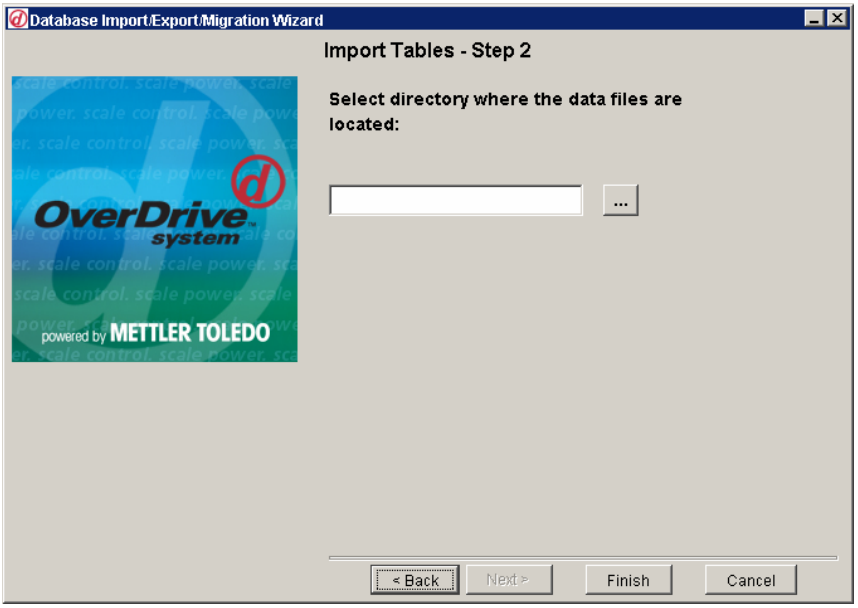
This operation imports information into the database. The data to be imported must be in a *.CSV file, and its format must match that of the OverDrive database. To see an example of how the file should be formatted, open a file that has been exported from the OverDrive database. This procedure should be attempted only by properly trained personnel. To begin the import procedure, select **Database Import/Export/Migration Wizard** from the **Wizards** folder in the side tree.

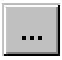
Step 1



1. Select the **Import Tables** radio button from the list of operations.
2. Click the **Next** button.

Step 2



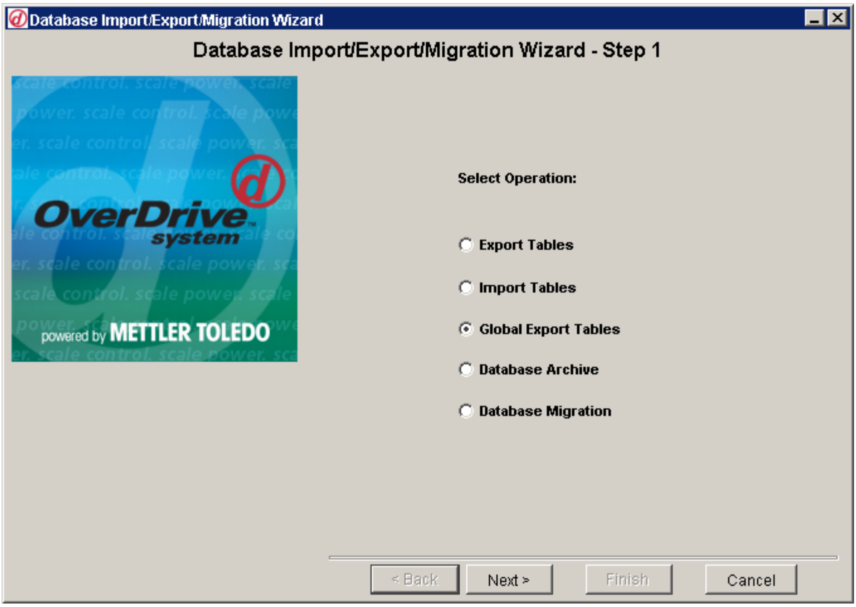


1. Select the directory from which you want to import database information. Type the directory location in the **Select directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. After selecting a storage directory, click the **Finish** button to import the data.

Global Export

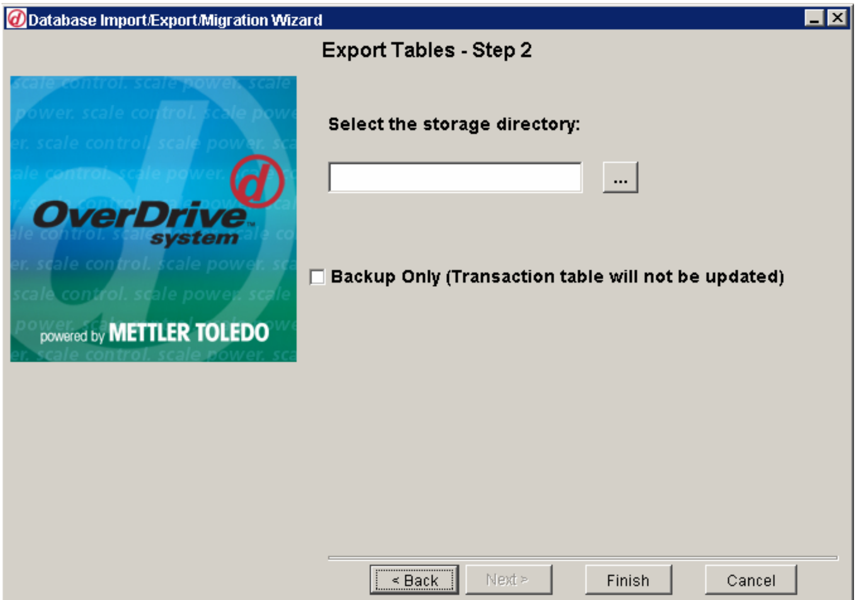
This operation exports all tables in the database. To begin the global export procedure, select **Database Import/Export/Migration Wizard** from the **Wizards** folder in the side tree.

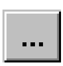
Step 1



1. Select the **Global Export Tables** radio button from the list of operations.
2. Click the **Next** button.

Step 2



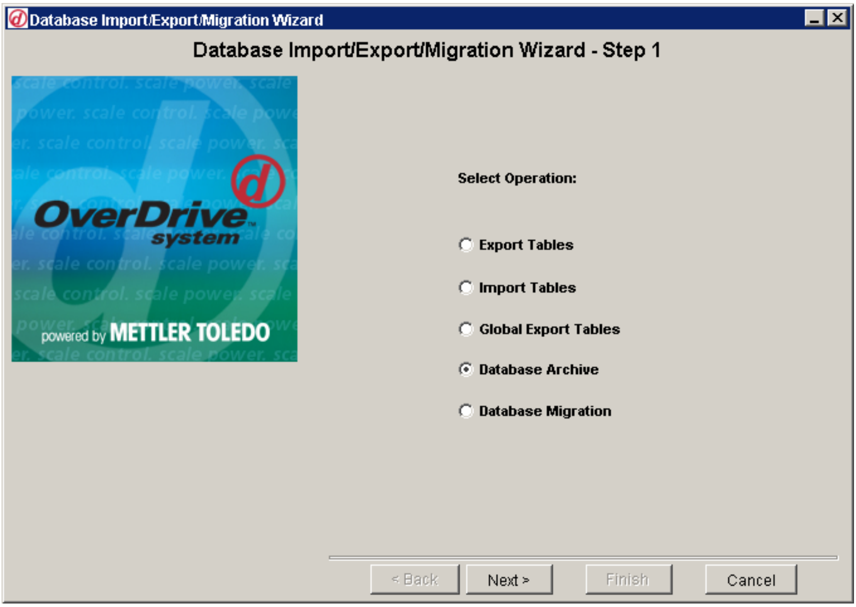


1. Select the directory to which you want to export the database information. Type the directory location in the **Select the storage directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. Check the **Backup Only** box if you are exporting data to back up your system. If the box is not checked, the transaction status will be changed to exported (X).
3. Click the **Finish** button to export the data.

Database Archive

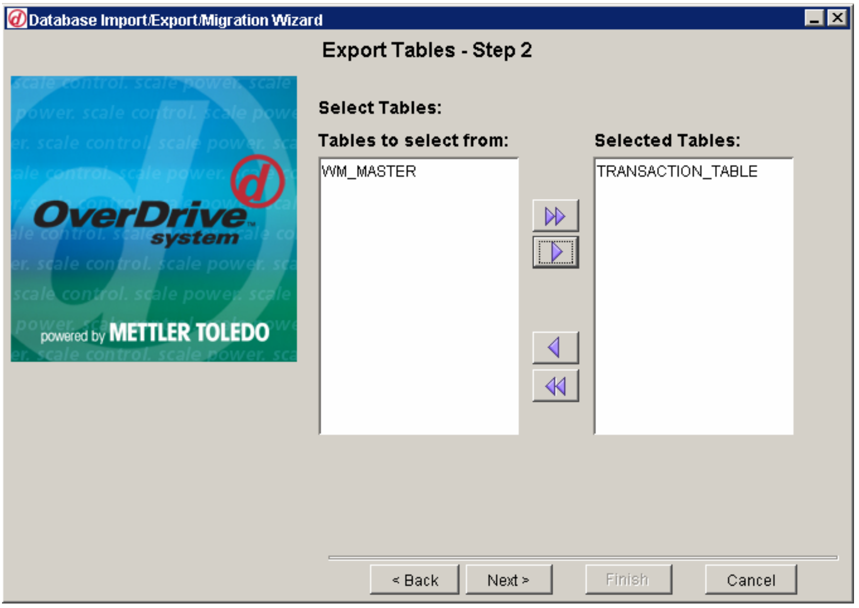
This operation archives data from specific tables. When data is archived, it is deleted from the database. To begin the database archive procedure, select **Database Import/Export/Migration Wizard** from the **Wizards** folder in the side tree.

Step 1



1. Select the **Database Archive** radio button from the list of operations.
2. Click the **Next** button.

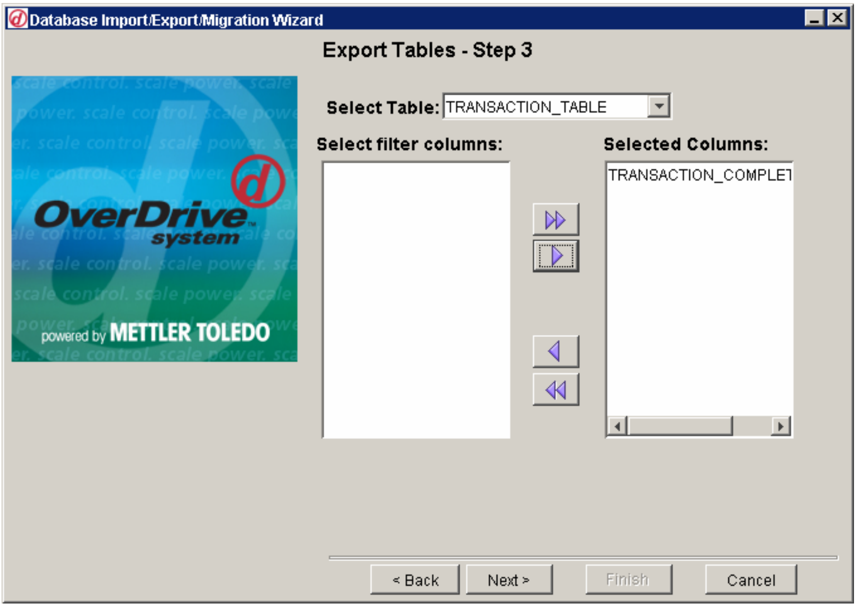
Step 2



Select the tables that you want to archive. You can select the **Transaction** and **Weights and Measures** tables (detail tables are selected automatically). The tables that can be selected are listed in the **Tables to select from** list box on the left.

1. Move the tables that you want to archive to the **Selected Tables** list box on the right. Use the arrow keys to move tables from one list box to the other.
2. When the tables that you want to archive are displayed in the **Selected Tables** list box, click the **Next** button.

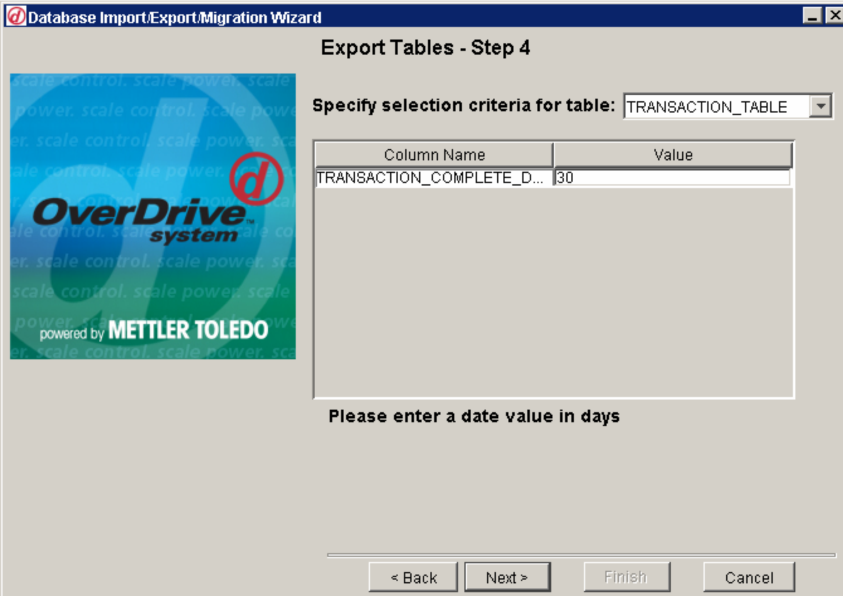
Step 3



After you have selected the tables to be archived, select each table's completion date column as a filter.

1. Select the first table in the **Select Table** combo box. That will display the table's completion date column in the **Select filter columns** list box on the left.
2. Move the column to the **Selected Columns** list box on the right. Use the arrow keys to move columns from one list box to the other.
3. When you have selected a filter column for each table in the combo box, click the **Next** button.

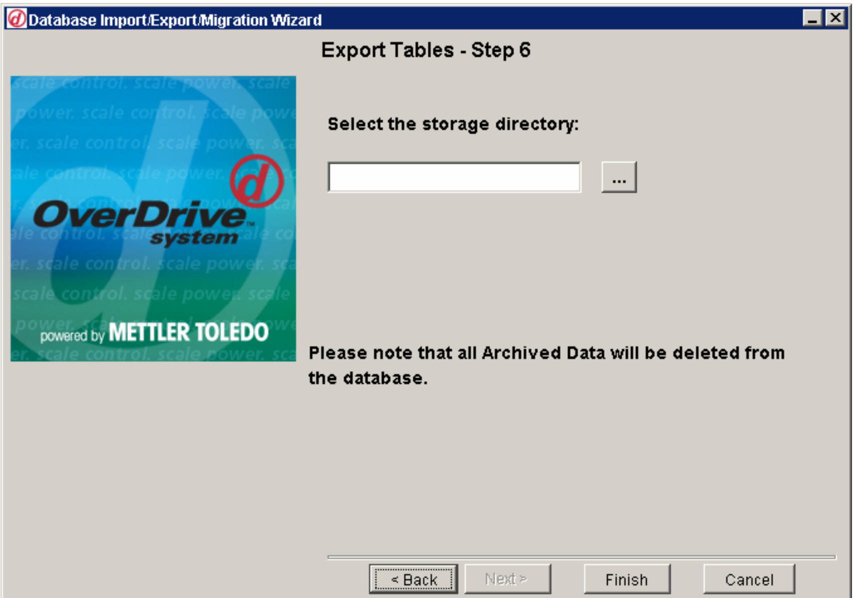
Step 4



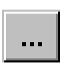
You can archive data only if it is more than 90 days old. In the **Value** column, enter the number of days worth of data you want to archive. For example, enter 30 to archive data that was recorded during the 30-day period between 90 days ago and 120 days ago.

1. Select the first table in the **Specify selection criteria for table** combo box. The columns selected in the previous step will be listed in the table below the combo box.
2. For each column name, enter the desired number of days in the **Value** column.
3. When you have entered all the values, click the **Next** button.

Step 5



Select the directory to which you want to archive the database information.



1. Type the directory location in the **Select the storage directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. Click the **Finish** button.

Database Migration

This operation migrates data from an earlier version of the software (1.1.0 or later) to a later version (2.0.0 or later). Database migration is not available with the OverDrive 1st program.

Push Buttons

The following push buttons are used to navigate through the wizard:

Back: Goes back to the previous screen.

Next: Goes forward to the next screen.

Finish: Accepts any changes made to the settings and closes the wizard.

Cancel: Closes the wizard without accepting any changes made to the settings.

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