



Food Pantry Software



Food Pantry Software Installation and Setup

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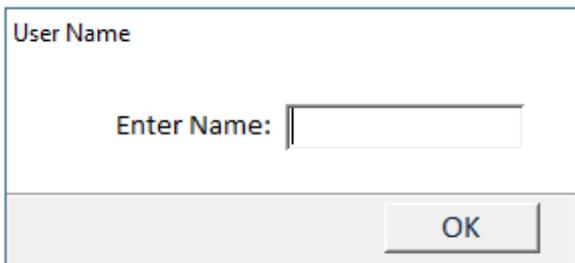
This software is free for any non-profit food pantry or
Society of St. Vincent de Paul conference

Pantry Software Installation and Setup

Installing the software

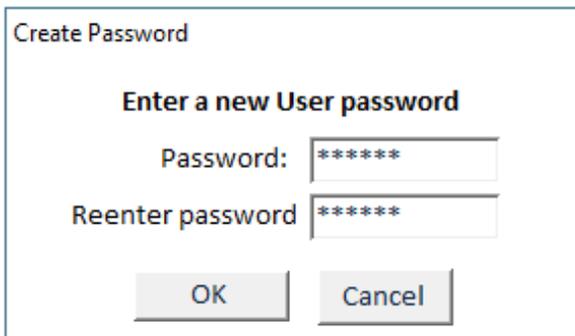
1. **IMPORTANT:** If you are installing an updated version of the application, be certain to back up your database before installing the new version or uninstalling the old version.
2. Before installing the application program files, your computer must be running a recent version of Microsoft Access. Recent versions include Access 2010, 2013 or 2016. The runtime version of Access 2010 is available for download on the Internet or available on the food pantry installation media.
3. Once Access is installed, install the pantry application and database files.
 - Copy the file **PantrySetup.exe** from the install media to your desktop and run it.
 - The setup program installs several files on your computer.
 - Pantry.mdb is the client application with all the forms and logic, and the other files contain the pantry data.
4. Next, open the application by clicking on the desktop shopping cart icon.
5. If you get a message stating “A potential security concern has been identified”, continue the program by clicking the **open** key. This message indicates that Access 2010 has determined that the program is executing a set of low-level database instructions. To suppress this message when opening the application in the future, see the section at the end of this document entitled **Eliminating the Access 2010 Security Message**.

Set the DBA and Administrative Passwords



A dialog box titled "User Name" with a text input field labeled "Enter Name:" and an "OK" button at the bottom right.

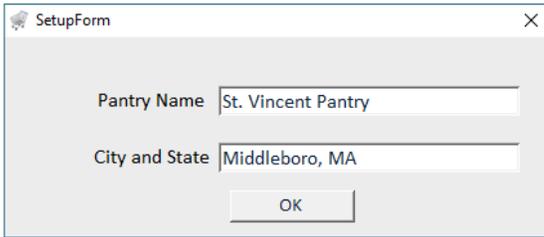
You will then be prompted to log in. Enter the user name DBA. The DBA can perform key database maintenance functions within the application.



A dialog box titled "Create Password" with the instruction "Enter a new User password". It contains two text input fields: "Password:" and "Reenter password", both containing six asterisks. There are "OK" and "Cancel" buttons at the bottom.

When prompted, create a password for the DBA. Enter the same password on both lines and click OK.

Set the name and location of the food pantry



SetupForm

Pantry Name St. Vincent Pantry

City and State Middleboro, MA

OK

You will be prompted to enter a pantry name, City and State. Enter the organizational name of the pantry on the first line, and on the next line enter the city and state. After you enter your pantry's values, click OK.

You will then be presented with the main menu. Since the system is configured initially to run against a database that resides in the local directory, the menu displays the text "Local connection."



Main Menu

St. Vincent Pantry
Middleboro, MA

Forms

Select a form

- Recipient Information
- Pantry Check-in
- Closed Accounts
- Utilities
- Export Data
- Database Maintenance

Open

Reports

Select a category

- Financial Assistance
- Food Distribution
- Intakes and Reviews
- Holiday Meals
- Households
- Search

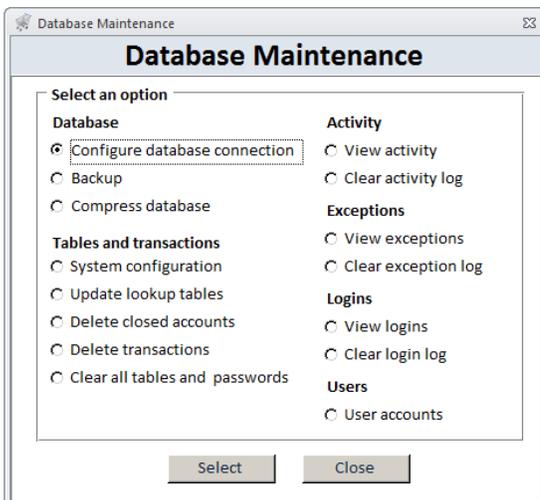
Run

Backup Exit Application Switch User

Local connection Build 20171107

Configuring the database

Under **Select a Form** on the main menu, click **Database Maintenance**. You are then presented with the **Database Maintenance** form.



Database Maintenance

Select an option

Database

- Configure database connection
- Backup
- Compress database

Tables and transactions

- System configuration
- Update lookup tables
- Delete closed accounts
- Delete transactions
- Clear all tables and passwords

Activity

- View activity
- Clear activity log

Exceptions

- View exceptions
- Clear exception log

Logins

- View logins
- Clear login log

Users

- User accounts

Select Close

Updating the system configuration table

From the **Tables and transactions** section of the **Database Maintenance** form, select **System Configuration** and you will be presented with the **System Configuration** form. The systems configuration form sets parameters that indicate whether certain optional features are supported and identifies a set of threshold values.

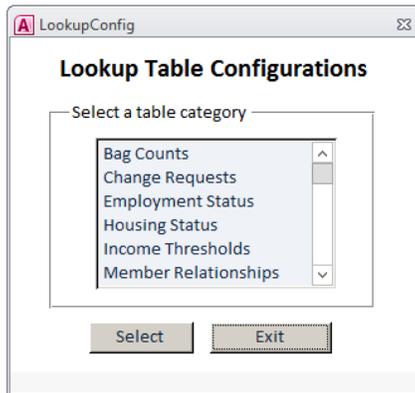
The following is a list of parameters and descriptions.

Identifier	Description
Food distribution frequency	The options are Monthly , Weekly or Other . If a pantry is open several times each month, such as the first four Saturdays, and recipients are assigned a specific day each month, select a frequency of Monthly . If a pantry is open several times each week, such as Tuesdays and Thursdays, and recipients are assigned a specific day each week, select a frequency of Weekly . Otherwise, select a frequency of Other .
Minimum days between visits	If not monthly or weekly distribution, minimum number of days between pantry visits. If no minimum, enter 0.
Calculate bag count	Identifies whether the system calculates bag distribution based on the size of the household. If bag count is calculated, see the Bag Counts section of this document.
Strictly enforce TEFAP eligibility	Permits pantry registration and food distribution only to households that meet TEFAP rule eligibility.
Non-food check-in	Allows check-in workers to issue certain non-food assistance
Require recipient documents	Identifies whether applicants must provide a personal ID and a proof of residency.
Enforce field validation	Identifies whether the system performs field-level validation as information is entered.
Holiday meals	Identifies whether the system supports the registration and distribution of holiday meals.
Bag count per meal	If holiday meals are supported, the number of bags that will be associated with the receipt of a holiday meal.
Last review within months	Holiday meal eligibility requires a recipient's last review within the time period. Zero indicates no holiday-specific review requirement.
Financial assistance	Identifies whether the system supports recording and reporting financial assistance.

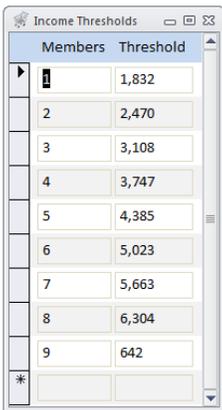
Identifier	Description
Approval threshold	If the system supports financial assistance, the maximum amount (in dollars) a worker can authorize without bringing the request to the conference.
Home visits	Identifies whether the system supports recording home visits.
Organization name	Organizational name that appears on forms and report
Organization location	Location of the organization in city, state format
Scheduled review type	The type of review that is scheduled if Review Frequency Months is greater than zero. Options include Residency , Full and Alternating (one year Residency and the next year Full)
Review frequency months	The frequency of recipient reviews in months. When a client checks in for food, if the last review was greater than the frequency, the system ¹ automatically schedules a review. The system notifies the check-in worker to provide the client with a review form that must be returned during the next visit, and the review status is set to RESIDENCY or FULL , depending on the value of Scheduled Review Type. A value of 0 indicates no reviews are scheduled.
Review address changes	Identifies whether a residency review will automatically be set when an address change is made and no proof-of-residency document has been provided.
Food distribution retention	Minimum retention period in years of food distribution records
Financial distribution retention	Minimum retention period in years of financial distribution records
Closed account retention	Minimum retention period in years of recipient account records after they are closed
User login retention	Minimum retention period in months of user logins
Record user logins	Identifies whether a log entry is created whenever a user logs in
Support recipient codes	Provides a field on the check-in and intake forms where workers can enter a code identifying the recipient as belonging to a category of recipients.

Updating lookup tables

From the **Tables and transactions** section of the **Database Maintenance** form, select **Update lookup tables** and you will be presented with the **Lookup Table Configurations** form. Select the following tables on that form:



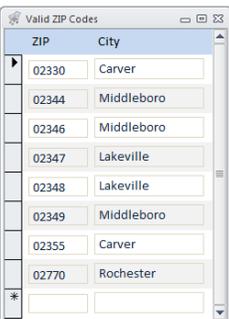
Income thresholds



Members	Threshold
1	1,832
2	2,470
3	3,108
4	3,747
5	4,385
6	5,023
7	5,663
8	6,304
9	642
*	

Select **Income Thresholds**. This table defines the current year's TEAP monthly income qualifying thresholds based on the size of a household. The first 8 entries are associated with the corresponding household size. The 9th entry is the amount added for each of the additional household members.

ZIP Codes



ZIP	City
02330	Carver
02344	Middleboro
02346	Middleboro
02347	Lakeville
02348	Lakeville
02349	Middleboro
02355	Carver
02770	Rochester
*	

Select **ZIP Codes**. Enter ZIP code and city combinations that correspond with those serviced by your food pantry. To add an entry, type the information on the row preceded by the asterisk. To delete an entry, select the row you wish to delete, click the arrow on the left of that row, and click the delete key on your keyboard.

Bag counts

If the system configuration table value of **Calculate Bag Count** is checked, select **Bag Counts**. This table indicates the number of bags that are distributed each time a client receives food, based on the size of the household.

Service categories

Category	Default value	Default cost	Check-in screen
Appliance			<input type="checkbox"/>
Car Repair			<input type="checkbox"/>
Clothing Voucher	\$45.00	\$0.00	<input checked="" type="checkbox"/>
Diapers/Wipes	\$20.00	\$20.00	<input checked="" type="checkbox"/>
Electric			<input type="checkbox"/>
Furniture			<input type="checkbox"/>
Gas/Propane			<input type="checkbox"/>
Gasoline	\$25.00	\$25.00	<input type="checkbox"/>
Gift Card			<input type="checkbox"/>
Heating Oil			<input type="checkbox"/>

Select **Service categories** to identify the various categories of financial services that are provided by the conference. The table can also indicate the **Default value** and **Default cost** of each service category. Finally, if the system configuration table value of **Non-food check-in** is checked (indicating certain categories of financial assistance can be distributed by a check-in worker), select the **Check-in screen** check box for each category that check-in workers can distribute.

Pantry Day

If the **Food Distribution Frequency** is either **Weekly** or **Monthly**, you must configure the Pantry Day table. For **Weekly**, enter the three character abbreviation of each day of the week when the pantry is open (MON, TUE, ...). For **Monthly**, the format is the three-character abbreviation for the day of the week plus the ordinal for that day of the month. For example, if the pantry is opened on the first and second Saturday, the entries would be SAT1 and SAT2.

Adding users

As the database administrator, one of your first tasks will be to add users and configure their level of entitlement. From the **Tables and transactions** section of the **Database Maintenance** form, select **Users** and you will be presented with the **User Accounts** form.

For each user, select Add from the list of dropdowns and enter a user name. Next select a security level for the user. Finally click the Add button. The security level entitlements are listed below.

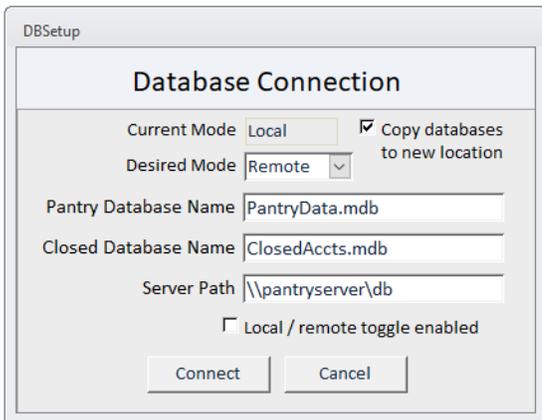
Security Level	Entitlement
Normal	Perform pantry check-in and run reports
Confidential	Perform normal functions plus view and update recipient information (perform intakes and reviews)
Admin	Perform confidential functions plus perform administrative tasks from the utilities menu
DBA	Perform all functions including database maintenance functions

Pantry database configuration and maintenance

Migrating the database to a file server

The application is initially configured to utilize the database files that were installed on the same directory as the application program. If you require more than 1 workstation to access the data, the database can be migrated to a windows file server.

From the main menu, in the **Select a Form** list, select **Database Maintenance**, and in the **Database Maintenance** form, select **Configure database connection**. The connection form will appear as below.



The screenshot shows a dialog box titled "DBSetup" with a sub-header "Database Connection". It contains the following fields and controls:

- Current Mode:** A dropdown menu set to "Local".
- Desired Mode:** A dropdown menu set to "Remote".
- Copy databases to new location:** A checked checkbox.
- Pantry Database Name:** A text box containing "PantryData.mdb".
- Closed Database Name:** A text box containing "ClosedAccts.mdb".
- Server Path:** A text box containing "\\pantryserver\db".
- Local / remote toggle enabled:** An unchecked checkbox.
- Buttons:** "Connect" and "Cancel".

On the **Database Connection** form, check the box labeled **Copy database to new location**. Next select **Remote** in the **Desired Mode** list box. Set the **Server Path** to the network server location that will contain your database. Next click **Connect**, and the database will be copied to the server location and the application will be linked to the remote server database. In this example, the database will be stored in the **db** directory on the server named **pantryserver**.

Important: After configuring the server database, when you install the application file (pantry.mdb) on another workstation, configure the database connection in a similar manner, but **DO NOT** check the box labeled **Copy database to new location**. To do so would overwrite the database on the server.

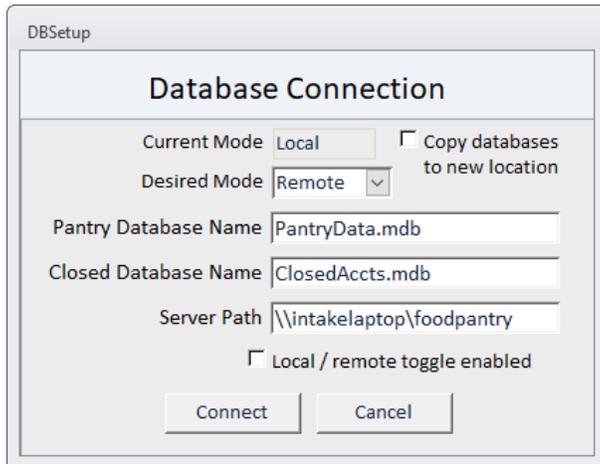
Toggling between local and remote mode

If you want the ability for users to connect to a remote database when the workstation is connected to the database server's network, or connect locally to a copy of the database when the workstation is not connected to the network, check the box labeled **Local / remote toggle enabled**. If enabled, a copy of the remote server databases will be copied to the local directory whenever the user exits the pantry program. When the program reopens, the system will attempt to connect to the remote server, and if the remote server is not accessible, it will connect to the database in the local directory.

A non-server network configuration

The following describes a simple way to network two workstations that share the same database tables on a local area network. This model could be used when configuring one workstation that acts as a check-in computer and another that performs intakes and reviews.

After installing the software on the check-in workstation, configure that computer's program directory as a shared read/write network directory. (The default installation directory is C:\foodpatry.)

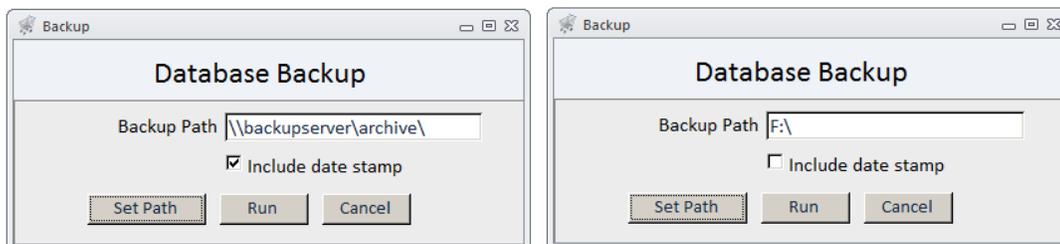


The screenshot shows the 'DBSetup' dialog box with the 'Database Connection' tab selected. The 'Current Mode' is set to 'Local' and the 'Desired Mode' is set to 'Remote'. The 'Copy databases to new location' checkbox is unchecked. The 'Pantry Database Name' is 'PantryData.mdb' and the 'Closed Database Name' is 'ClosedAccts.mdb'. The 'Server Path' is '\\intakelaptop\foodpantry'. The 'Local / remote toggle enabled' checkbox is unchecked. There are 'Connect' and 'Cancel' buttons at the bottom.

Next configure the intake and reviews computer to access the check-in computer's database tables. This example will link to tables on the check-in workstation that is named *intakelaptop*.

Database backups

To reduce the risk of losing data due to a hardware failure, you will want to back up the database files periodically to an external device or to a network archival server. The system supports backing up the database tables to another device or server. From the main menu, in the **Select a Form** list, select **Database Maintenance**, and in the **Database Maintenance** form, select **Backup**. When the **Database Backup** form appears, enter the path of the backup device and indicate whether backup file names will include a date stamp. When you have entered those to values, click the **Set Path** button. In the first example below, the user has indicated that backups are to be written to the archive directory on the network's backup server computer, and the backup files names should include a time stamp. In the second example, the user has indicated backups are to be written to the root directory of the computer's F drive, which corresponds with an attached USB flash drive.



The first screenshot shows the 'Database Backup' dialog box with the 'Backup Path' set to '\\backupserver\archive\' and the 'Include date stamp' checkbox checked. The second screenshot shows the same dialog box with the 'Backup Path' set to 'F:\' and the 'Include date stamp' checkbox unchecked. Both screenshots have 'Set Path', 'Run', and 'Cancel' buttons.

Once the target device and path has been set, the user can back up database tables by clicking the **Run** button on the Database Backup form. Similarly, backups can be performed by clicking the **Backup** button located on the program's main menu.

Automated backups

To automate backups, it is recommended that you set up a scheduler script on the database server that performs a nightly backup of files from the database server to the archive server. A sample script is included on the installation media.

Database compression

Over time the database will grow in size even when records are deleted. For that reason, it is recommended that you perform data compression periodically. To do so, go to the **Database Maintenance** form and select the option labeled **Compress database**. Note that you can perform database compression only when other users are not accessing the database. It is recommended that you perform a database backup before running a database compression.

Creating an empty database

If it becomes necessary to initialize the database and delete all records from the database files, there is an option entitled **Clear all tables and passwords**. Obviously, this option should be used seldom if at all, and with a great deal of discretion.

Eliminating the Access 2010 Security Message

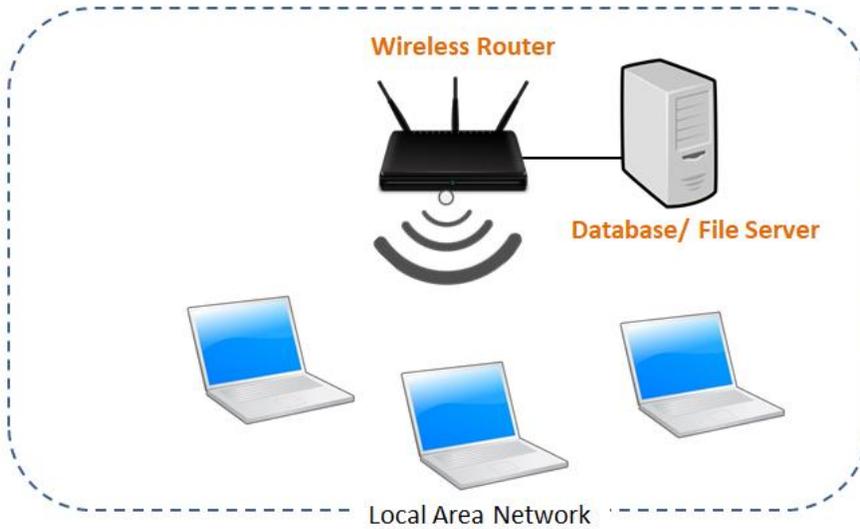
If you encounter the message “A potential security concern has been identified” when starting the program, do the following:

1. Download the file AddPath2010.
2. Using Windows Explorer, copy the file to the pantry program directory (C:\Foodpantry).
3. Run the program by double clicking it from the windows explorer.

Typical server-based pantry configurations

The first configuration supports LAN-based access from the pantry workstations a common back-end database via a WIFI connection. The second configuration adds remote user access, employing either a virtual packet network or a remote desktop running on the server.

Simple LAN Configuration



LAN and Remote Access

