Asset Tracking System
User Manual

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Asset Tracking System

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Welcome!

Thank you for purchasing ATS! It is quickly becoming one of the most popular asset tracking systems because of its ease-of-use and dependability. This User's Manual is designed to help you get going quickly and be ready to use ATS as soon as possible. It covers our standalone Access version along with our network Microsoft Access™ and Microsoft SQL Server™ versions. Access installations are quick and easy for anyone with a reasonable understanding of Windows operating systems. SQL Server is licensed separately and is best installed by someone knowledgeable in working with SQL Server administrative functions.

ATS Features

Four versions are now available.

Starter Edition

- Asset functions (Find, Information, History)
  - Includes binned items, warranty, depreciation, attached images and documents
- Check In/Out assets to employees or locations
- Reports
  - Includes ability to create PDF file and e-mail any report
- Import from TAB delimited TXT file for Assets and Employees
- Export to CSV file for Assets and Employees
- Barcode scanning with corded scanner attached to PC

Basic Edition

Adds to Starter Edition:

- Label design and printing
- Asset Reservations
- Mobile handheld scanning with Pocket PC terminals (batch and wireless available)
  - Functions include identify asset, check out/in, bin count, and audit
- Audit reports

Professional Edition

Adds to Basic Edition:

- User defined fields based on Class and Type of Asset (unlimited)
- Asset Maintenance functions
- Shows overdue assets on check out screen
- Maintenance reports

School Edition

Adds to Professional Edition:

- Members (can be renamed by user)
- 3 user defined Member categories (e.g. Student, Faculty, Staff)
- 4 user defined Member information fields
- Check In/Out assets to Members
- Import Members from TAB delimited TXT file
- Export Members to CSV file

Quick Start Overview

Now that you have installed ATS, you are probably wondering what to do next. This brief Quick Start card and the User's Manual (located on the CD) provide the general information you need to begin entering data into the system and using ATS for the first time! Take a good look through the system and manuals before proceeding too far!

1. Asset Types and Classifications

This function allows you to create classifications and types within each classification. Classifications (i.e. Office Equipment) and (sub-) Types (i.e. Desks, Chairs, etc.) are used to categorize assets. On the menu bar select Support → Asset Support Administration. You can rename the Class and Types designators in the Setup Options function if desired. See Asset Support Administration in the User Manual for more information.

2. Conditions

Add any number of Conditions that you desire (Excellent, Good, Poor, etc.) This is a searchable field and can be invaluable to locate equipment needing replacement, etc.

3. Funding Source and Accounts

The Funding Source is a standalone field that can be setup by you to use as needed. You can also rename the Funding Source in the Setup Options function if desired. The Accounts screen allows you to tie each Asset to an account number for added filtering.

4. Facilities

This function allows you to enter facilities, which are used to organize asset locations. On the menu bar select Support→ Facility Administration. See Facility Administration in the User Manual for a detailed explanation.

5. Locations

This function allows the user to create locations where assets are stored or to which assets are checked out. Locations can also be classified as "Storage" locations. Storage locations are typically where materials are centrally located until checkout. On the menu bar select Support→ Location Administration. See Location Administration in the User Manual for a detailed explanation.

6. Employees

This function has you enter employees. An employee may be an individual that will be using the ATS system or a person to which assets may be checked out. You can set ATS Access Rights for each employee here also. On the menu bar select File→ Employee Administration. See Employee Administration in the User Manual for a detailed explanation.

7. Printer Assignment

This function allows the user to specify which windows printer will be used for report printing and which one will be used for label printing. This function must be set on each workstation before printing. On the menu bar select File → Printer Assignment. See Printer Assignment in the User Manual for a detailed explanation.

8. Label Design

The system allows the user to design labels for assets, locations, and employees. These labels typically have barcodes and can be used to audit, check in, and check out assets. Several sample label designs are included and can be modified. You must select a DEFAULT label format in the Label Setup function before printing is allowed. On the menu bar select Labels → Label Designer. See Label Designer and Label Setup in the User Manual for a detailed explanation.

9. Assets

The asset administration screen allows for the creation and maintenance of assets which are tracked by this system. On the main button bar select the Asset button. See Asset Management in the User Manual for a detailed explanation.

Once you have setup your initial data, you are ready to start using ATS! Check out assets to employees or locations and create reservations. You can also check assets back “in” to storage. Be diligent on how you use the system and it will provide years of reliable tracking of all of your assets!

Backup your database daily!

Logging in to ATS

When the program starts, the Log In screen is displayed. The User Name and Password text boxes are blank. If this is the first entry into the program, you will use the Admin User's data.

The User Name is: ADMIN
The Password is: ADMINUSER

Once you are into the system, you may add other users. After users are entered into the system, each user should log in with their own User Name and Password.

Registration

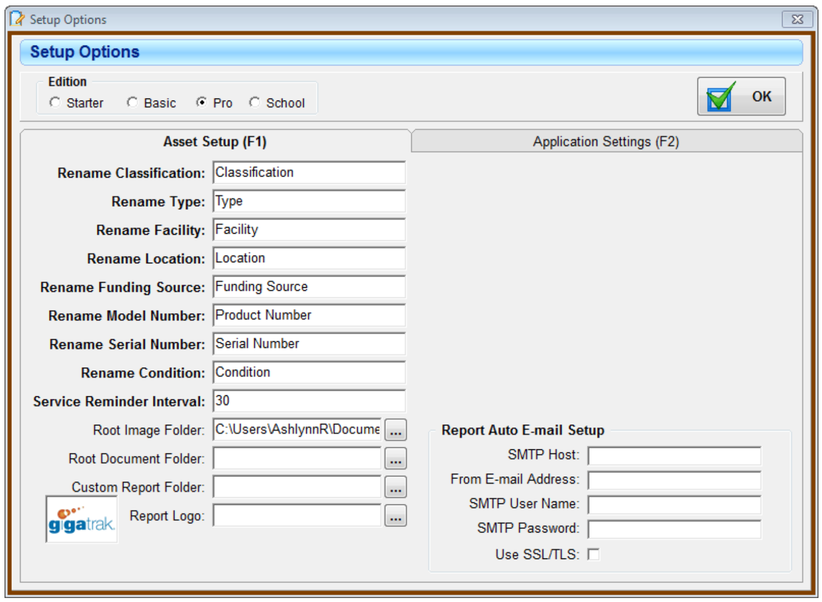
Access to the Registration screen is only available when the ADMIN login is used. After logging in, select Registration Form on the File menu.

The registration process is used to assign licensing rights to the user. When the program is purchased, GigaTrak will provide a four (4) digit identifier and a 16 digit registration key. Calling up the registration form from the file menu on the main screen and entering this information will unlock the program for licensed use.

Setup Options

Access to the Setup Options screen is only available when the ADMIN login is used. After logging in, select Setup Options on the File menu.

Asset Setup (F1)



The first tab in the Setup Options screen is used to change the name of eight parameters in the system and establish a default location for asset pictures, documents, custom reports, and the report logo.

Classification, Type, Facility, Location, Funding Source, Model Number, Serial Number and Condition are parameters tied to assets. These may be of use as tools to organize assets into groups.

To change these values, type in the value desired, then select the OK button.

The Service Reminder Interval is used to calculate when asset maintenance is due (default is 30 days).

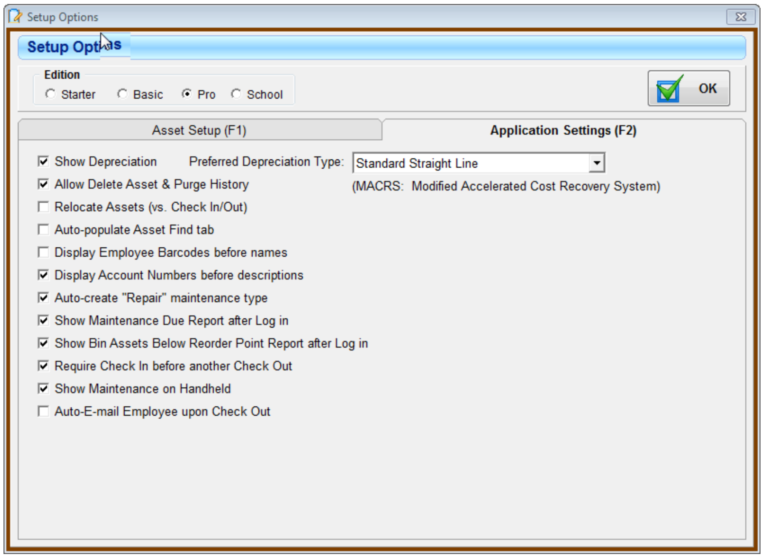
The root image folder is the default location for images that you wish to tie to an asset. If the image is in the default location, only the file name is required in the asset screen to identify the image.

The custom report folder is the location for custom report files. There are many standard reports built into ATS. However, you may need a report that is not in the system. If a custom report is ordered, the report file should be placed in a folder, and the path to the folder should be set in this option.

The report logo allows the display of a company logo on all reports. You can select any .bmp, .gif, or .jpg file. When a logo is selected, it will appear in the box at the left side of the screen. To clear a logo after it is selected, click the “Select” button and click Cancel on the selection screen.

Application Settings (F2)

The second tab controls various functions in the asset tracking application.



If Show Depreciation is checked, then the depreciation information will be visible on the Asset information screen. If the checkbox is not checked, the depreciation information will not be visible.

If Allow Delete Asset & Purge History is checked, then the Delete button will be displayed on the Asset screen, and the Purge History button will be displayed on the Asset History screen. If the checkbox is not checked, the Delete button and the Purge buttons will not be displayed.

If Relocate Assets is checked, the Check In/Out function will change to a relocate function. This option does not use storage locations and does not allow entry or tracking of binned items. Assets are relocated from one location (or person) to another location (or person) without being returned to a storage location.

The Auto-populate Asset and Member Find Tab has the listings filled in automatically when the asset or member screen is opened. If not checked, you must “Extract” data first to view a listing.

The Display Employee Barcodes before names setting will display the employee barcode and then employee name in dropdown lists when checked. If unchecked, the name will appear before the barcode.

The Display Account Numbers before descriptions will display the account number and then the account description in dropdown lists. If unchecked, the description will appear before the account number.

The Auto-create “Repair” maintenance type will insert a repair maintenance item anytime a new Classification and Type of equipment is created.

The Show Maintenance Due Report after Log In automatically displays the report of any upcoming maintenance items immediately following log in.

The show Bin Assets Below Reorder Point after Log In automatically displays the report of any bin items below the reorder point immediately following log in.

Require Check In before another Check Out will require a checked out tool to be checked back in to the storage location before it can be checked out again. Leaving this unchecked will allow a tool to be checked out from person to person (or location to location) without being returned to the storage location.

The Show Maintenance on Handheld will allow users to enter maintenance information on the handheld scanner.

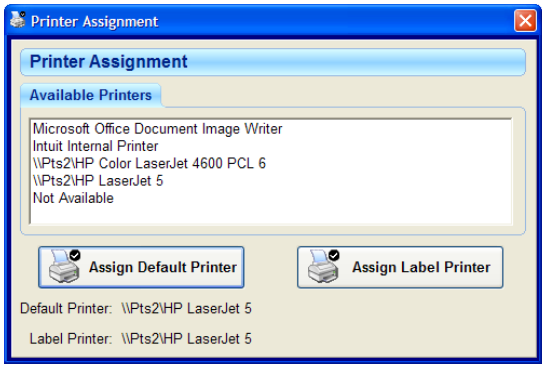
Auto E-mail Employee upon Check Out will email an employee a report of what they checked out through the system. This feature can be used if you use Microsoft Outlook and connect the systems.

To save the changes for both tabs on the screen, select the OK button. A confirmation message will appear, listing the items that you altered. Selecting “Yes” will save the changes and close the screen. Selecting “No” will reset the changes back to the original values.

To leave the process without changing any values, select the ☒ in the upper right corner of the screen.

Printer Assignment

The printer assignment process is used to set the printer the system will use for printing reports and barcode labels. Select Printer Assignment from the File menu and the screen below will be displayed.



The Available Printers list will display all the printers that are on the Windows printer list.

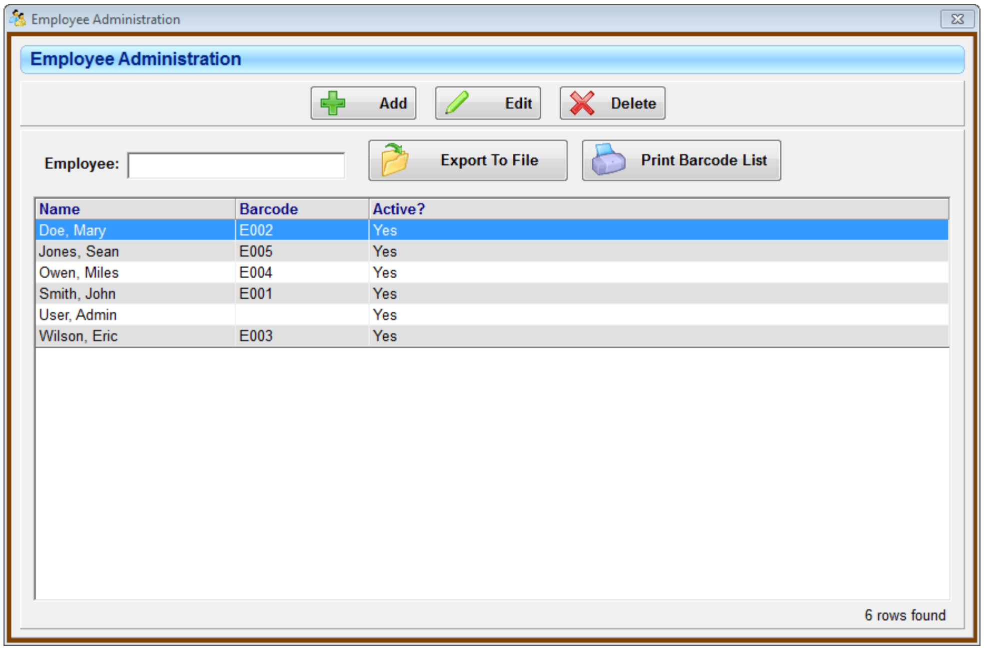
To select the report printer, select the printer of choice and then select the Assign Default Printer button. The Default Printer label will indicate the printer you selected. Any reports printed by the system will be directed to this printer. This does not affect the windows default printer selection.

To select the label printer, select the printer of choice and then select the Assign Label Printer button. The Label Printer label will indicate the printer you selected. Any labels printed by the system will be directed to this printer. If you do not have a label printer, assign the label printer to be the same printer as designated for the default printer.

To leave the process, select the ☒ in the upper right corner of the screen.

Employee Administration

Employees are people that will need to log in to the ATS system, or people to whom assets are or will be assigned. To manage employees, select Employee Administration under the File menu.

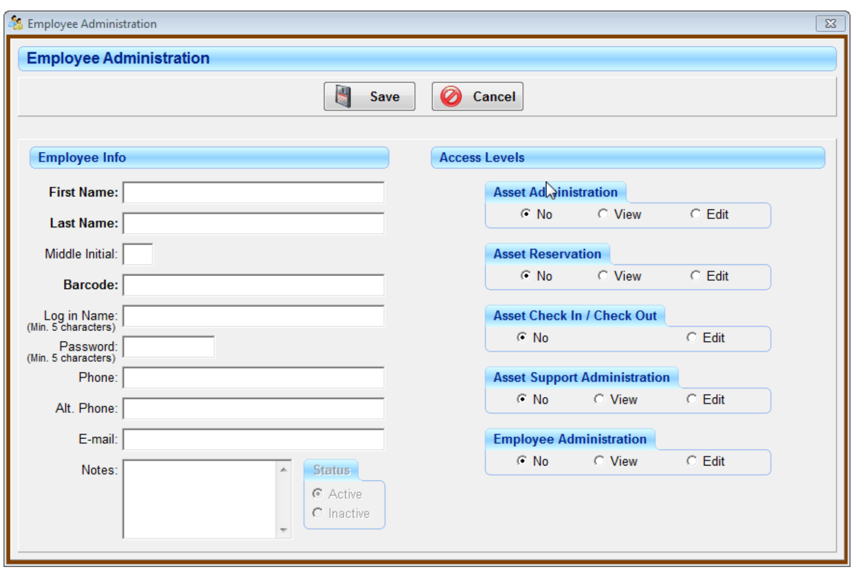


Initially the only employee will be the Admin User. As you can see you may Add, Edit, or Delete employee information.

After other employees are added, they will appear on the list.

To Add a new employee, select the Add button. The form will change as indicated. The items in bold text are required for all employees.

If the employee will be using the ATS system, he will require a Log in Name and Password.



Enter the appropriate employee information. A few fields have special requirements:

- The barcode entry must be unique. A barcode for an asset, location, or employee may not be the same. To keep the barcode as small as possible only use a combination of capital letters and numbers. If you use the supplied barcode labels, the employee's barcode must match the label placed on their badge.
- The Log in Name must be at least 5 and no greater than 10 characters long. It must be unique. No two employees may have the same log in name. Log in Names are not case sensitive.
- A password must be at least 5 and no greater than 10 characters long. Passwords are not case sensitive.

Once the employee information is entered, if the employee will require access to ATS, their access level should be set. To set the employee's access level, select the Access button.

There are 5 separate access levels that may be set for each employee. The default access level is for <u>no</u> access to ATS:

- Asset Administration applies to activities associated with creating and editing asset data.
- Asset Reservation applies to the activities where an individual may reserve an asset for a period of time.
- Asset Check In/Check Out applies to activities associated with assigning assets to an individual or location, or returning assets to storage.
- Asset Support Administration applies to activities that support the overall asset process. This will include managing facilities, locations, asset types, classifications, and conditions.
- Employee Administration applies to activities associated with managing employee information.

Select the access level appropriate for the employee in question and then select the OK button. Selecting the Cancel button will return the access levels to those that existed prior to opening this portion of the form. In either case, the form will return to the add employee screen.

To save the employee information, including the access level changes, select the Save button. Selecting the Cancel button will leave the present process without saving the employee information.

To edit an employee's information, select the employee from the list and then select the Edit button.

The form will change and display the employee's information similar to the add process.

Change the information or access levels as required and then select the Save button to save the changes, or the Cancel button to leave the Edit process without saving. Either process will return to the display above.

The system will not allow editing of the last name, first name, middle initial, or user name for Admin User.

To delete an employee, select the employee and then select the delete button.

If an employee is assigned an asset or has an outstanding reservation or is involved in a history record, the system will not allow the employee to be deleted. To prevent the employee from being selected in the future, Edit the employee and set the status to “Inactive”.

The employee information can be exported to a comma delimited CSV file, which can be opened in Microsoft Excel. Just select the Export To CSV File button. The button will only be available to users that have Edit permission to the Employee Administration screen.

A barcode list can also be printed by selecting the Print Barcode List button. This report contains employee barcodes that can be scanned with a corded or handheld scanner. Only active employees will appear on the list. Admin User will not be on the list.

To print Employee labels, select the Employee(s) to be printed and then select the Print Label button. If a label printer has been selected and if a default Employee label has been designated (see Label Design/Label Setup in this manual), the label(s) will be printed.

For label printing, multiple Employees may be selected. To select multiple Employees, do one of the following:

- Drag the mouse over the Employees desired while holding down the left mouse button.
- Select the first Employee by left clicking with the mouse. Select the last Employee in a range by holding down the Shift key and the left clicking on the last Employee. All Employees in between will be selected.
- Hold down the Control (Ctrl) key and select the Employees you wish to print by left clicking on each one with the mouse.

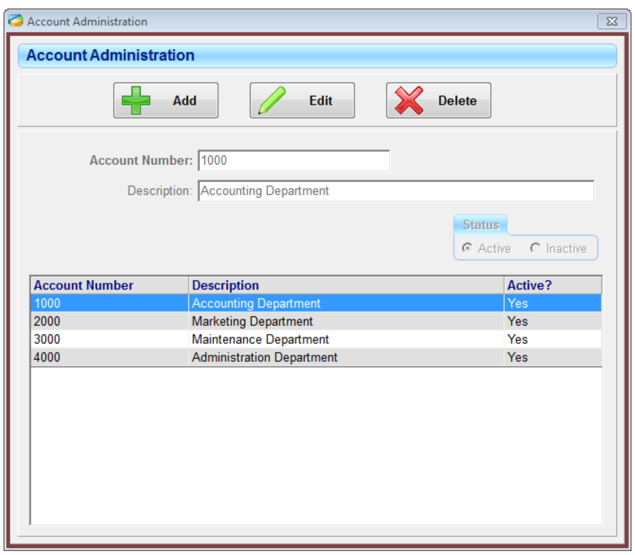
If the employee logged into the system only has view rights to Employees, the Add, Edit, and Delete buttons will not be available. Instead, a View button will be available to allow the user to look at but not change employee information.

To leave the process, select the ☒ in the upper right corner of the screen.

Account Administration

Account Administration is used to keep track of the account numbers that are used to purchase assets. Account numbers are not required to use ATS.

To begin the process, select Account Administration from the Support menu. The screen shown will be displayed.



Activities available for Accounts are:

- Adding a new Account,
- Editing an existing Account, or
- Deleting an existing Account.

To Add a new account, select the Add button. Enter the Account Number (required field) and a description (optional), then select the Save button.

Select the Cancel button to exit the Account addition without saving the new Account.

To Edit an Account, select the Account of interest and then select the Edit button.

Modify the information as desired. Select the Save button to save the Account changes.

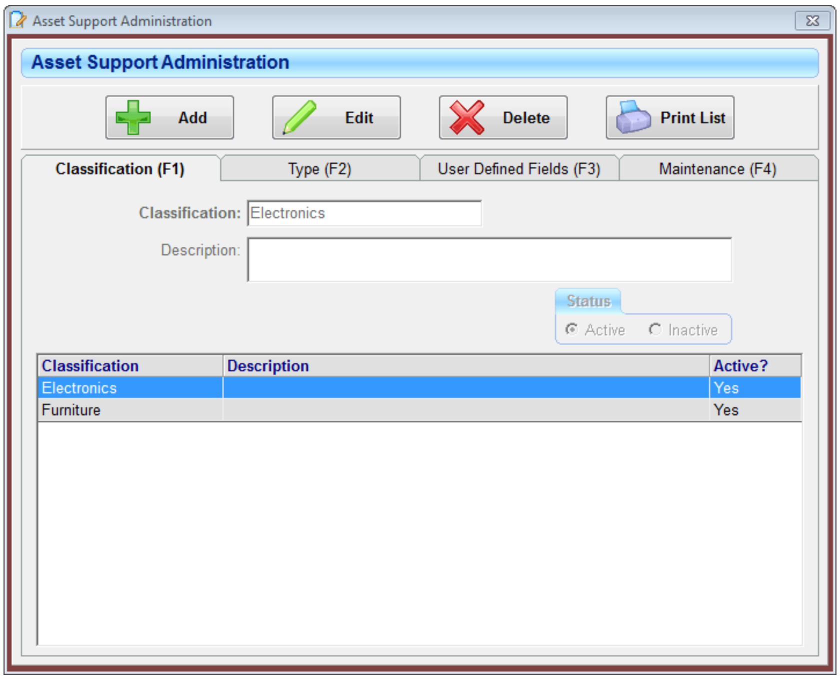
Select the Cancel button to exit the Account addition without saving the Account changes.

To delete an Account, select the Account to be deleted and then select the Delete button. The system will check to see if the account is tied to an asset. If so, the system will not allow the Account to be deleted. You may inactivate the Account to prevent it from being assigned to an asset in the future if you desire.

To leave the process, select the ☒ in the upper right corner of the screen.

Asset Support Administration

Asset Support Administration is used to administer Classifications, Types, and Maintenance (Pro/SE). To access this process, select Asset Support Administration under the Support menu. The screen shown will be displayed.



The Asset Support Administration screen has four (4) tabs: Classification, Type, User Defined Fields, and Maintenance. The names for Classification and Type may be changed in the Setup Options screen.

Classification (F1)

The first tab is Classification. Assets may be assigned a Classification to organize them in groups.

Each Classification has a name (Classification) and Description. In addition, a Classification may be designated as Active or Inactive.

- Classification (name) may be up to 20 characters and is required. The Classification (name) must be unique (i.e., no other Classifications may have the same Classification (name).
- Description may be up to 80 characters long and is not required.
- A Classification set as active may be assigned to an asset.
- A Classification set as inactive will not be available to be assigned to an asset.

Setting a Classification to inactive may be useful to reduce clutter when assigning Classifications to assets, yet it remains in the database for historical purposes. If a Classification does not need to be kept in the database for historical purposes, it should be deleted.

Activities available for Classifications are:

- Adding new Classification,
- Editing an existing Classification, or
- Deleting an existing Classification.

Adding a New Classification
To add a new Classification, select the Add button.

1. Enter the new Classification (name) and Description (optional).
2. Select the Save button to save the new Classification.

Selecting the Cancel button exits the Classification addition without saving the new Classification. If the Classification was saved, the new Classification will appear on the Classification list.

Editing an Existing Classification
To edit an existing Classification, select the Classification to be edited from the listing and then select the Edit button.

1. Modify the Classification (name), Description, or Status (Active vs. Inactive).
2. Select the Save button to save the changed Classification.
3. Select the Cancel button to exit the Classification change without saving the changed Classification.

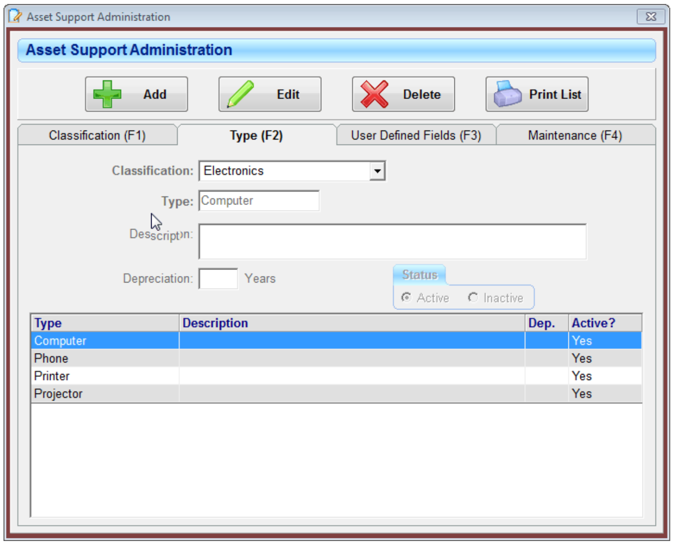
If the Classification was saved, the changed Classification will appear on the Classification list.

To delete a Classification, select the Classification to be deleted and then select the Delete button. The system will check to see if the Classification is assigned to an asset. If so, the system will not allow the Classification to be deleted. You may inactivate the Classification to prevent it from being assigned to future assets if you desire.

To leave the process, select the ☒ in the upper right corner of the screen.

Type (F2)

Type is a subclass of Classification. Each Classification can have several Types. In addition to grouping assets under a Type, the Type will also set the default depreciation period for assets assigned to it.



Each Type has a name (Type), Description, and Depreciation period in years. In addition a Type may be designated as Active or Inactive.

- Type (name) may be up to 20 characters and is required. The Type (name) must be unique (i.e., no other Types may have the same Type (name)).
- Description may be up to 80 characters long and is not required.
- Depreciation may be up to 255 years and is not required.
- A Type set as active may be assigned to an asset.
- A Type set as inactive will not be available to be assigned to an asset.

Setting a Type to inactive may be useful to reduce clutter when assigning Types to assets, yet it remains in the database for historical purposes. If a Type does not need to be kept in the database for historical purposes, it should be deleted.

Activities available for Types are:

- Adding new Type,
- Editing an existing Type, or
- Deleting an existing Type.

Adding a New Type

To add a new Type, select the Add button.

1. Select the appropriate Classification for the new Type.
2. Enter the new Type (name), Description, and depreciation period.
3. Select the Save button to save the new Type.

Select the Cancel button to exit the Type addition without saving the new Type.

If the Type was saved, the new Type will appear on the Type list.

Editing an Existing Type

To edit an existing Type, select the Type to be edited and then select the Edit button.

1. Modify the Type (name), Description, Depreciation, or Status (Active vs. Inactive).
2. Select the Save button to save the changed Type.

Select the Cancel button to exit the Type change without saving the changed Type. If the Type was saved, the changed Type will appear on the Type list.

To delete a type, select the Type to be deleted and then select the Delete button. The system will check to see if the Type is assigned to an asset. If so, the system will not allow the Type to be deleted. You may inactivate the type to prevent it from being assigned to future assets if you desire.

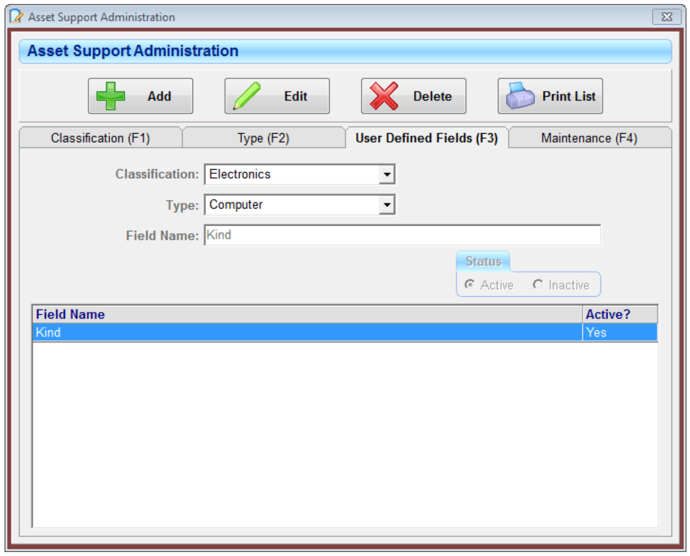
To leave the process, select the ☒ in the upper right corner of the screen.

User Defined Fields (F3)

The third tab is the User Defined Fields. Fields can be added specific to an asset “Type”. When new assets are added to the system, the added fields are displayed in the Asset Information screen for user entry.

After selecting the appropriate Classification and Type for the asset, a listing of the current User Defined Fields is displayed. Each field has a name and may be designated as Active or Inactive.

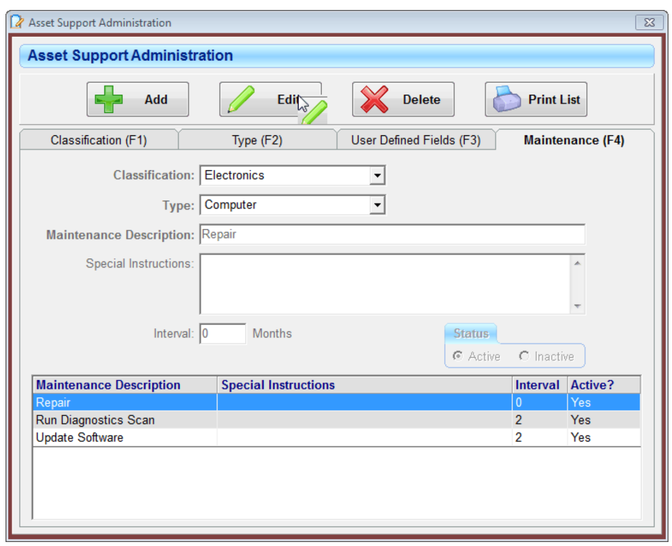
- The Field Name may be up to 50 characters and is required.
- A Field Name set as active will be assigned to each asset of that Type.
- A Field Name set as inactive will not be available.



Setting a User Defined Field to inactive does NOT remove the data already recorded for any asset of that type. It will not be displayed on the Asset Information screen. Returning the asset to active will restore prior data for each asset of that type.

Maintenance (F4)

The forth tab is Maintenance. Each “Type” of equipment may be assigned a group of specific Maintenance items with a preset interval in months for required performance. In addition, a “Repair” maintenance item may automatically be inserted when a new “Type” is created. This is created in Setup Options.



Each maintenance item has a Description and Special Instructions. In addition, a maintenance item may be designated as Active or Inactive.

- The Maintenance Description may be up to 50 characters and is required. The Description must be unique (i.e., no other Description may be the same.
- Special Instructions may be up to 255 characters long and is not required.
- A Maintenance item set as active may be assigned to an asset of that type.
- A Maintenance item set as inactive will not be available.

Setting a Maintenance item to inactive may be useful to reduce clutter when assigning Maintenance item to assets, yet it remains in the database for historical purposes. If a Maintenance item does not need to be kept in the database for historical purposes, it should be deleted.

Activities available for Maintenance item are:

- Adding new Maintenance item,
- Editing an existing Maintenance item, or
- Deleting an existing Maintenance item.

Adding a New Maintenance Item
To add a new Maintenance Item, select the Add button.

1. Enter the new Maintenance Description.
2. Enter any Special Instructions.
3. Select the Save button to save the new Maintenance Item.

Select the Cancel button to exit the Maintenance Item addition without saving the new Maintenance Item. If the Maintenance Item was saved, the new Maintenance Item will appear on the Maintenance Item list.

Editing an Existing Maintenance Item
To edit an existing Maintenance Item, select the Maintenance Item to be edited and then select the Edit button.

1. Modify the Maintenance Description, Special Instructions or Status (Active vs. Inactive).
2. Select the Save button to save the changed Maintenance Item.

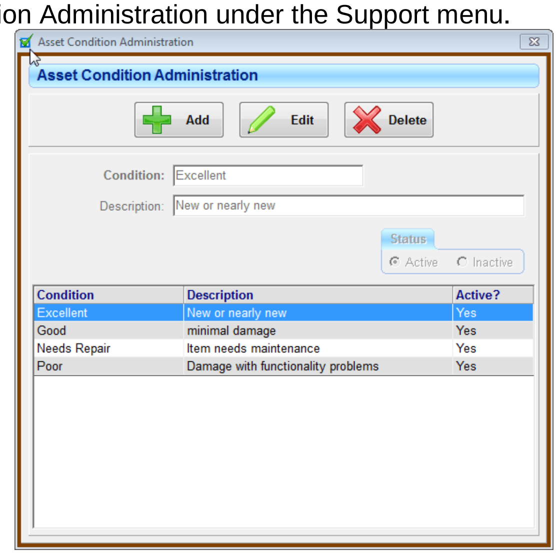
Select the Cancel button to exit the Maintenance Item change without saving the changed Maintenance Item. If the Maintenance Item was saved, the changed Maintenance Item will appear on the Maintenance Item list.

To delete a Maintenance Item, select the Maintenance Item to be deleted and then select the Delete button. The system will check to see if the Maintenance Item is assigned to an asset. If so, the system will not allow the Maintenance Item to be deleted. You may inactivate the Maintenance Item to prevent it from being assigned to future assets if you desire.

To leave the process, select the ☒ in the upper right corner of the screen.

Condition Administration

Assets may be assigned a Condition, which indicates the usefulness of the asset. To access this process, select Asset Condition Administration under the Support menu.



Each Condition has a name (Condition) and Description. In addition a Condition may be designated as Active or Inactive.

- Condition (name) may be up to 20 characters and is required. The Condition (name) must be unique (i.e., no other Conditions may have the same Condition (name).
- Description may be up to 80 characters long and is not required.
- A Condition set as active may be assigned to an asset.
- A Condition set as inactive will not be available to be assigned to an asset.

Setting a Condition to inactive may be useful to reduce clutter when assigning Conditions to assets, yet it remains in the database for historical purposes. If a Condition does not need to be kept in the database for historical purposes, it should be deleted.

Activities available for Conditions are:

- Adding new Condition,
- Editing an existing Condition, or
- Deleting an existing Condition.

Adding a New Condition

To add a new Condition, select the Add button.

1. Enter the new Condition (name) and Description.
2. Select the Save button to save the new Condition.

Select the Cancel button to exit the Condition addition without saving the new Condition. If the Condition was saved, the new Condition will appear on the Condition list.

Editing an Existing Condition

To edit an existing Condition, select the Condition to be edited and then select the Edit button.

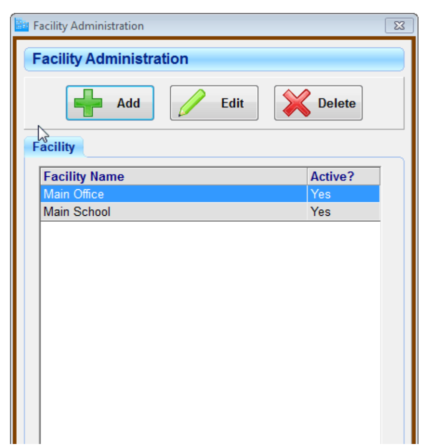
1. Modify the Condition (name), Description, or Status (Active vs. Inactive).
2. Select the Save button to save the changed Condition.

Select the Cancel button to exit the Condition change without saving the changed Condition. If the Condition was saved, the changed Condition will appear on the Condition list.

To delete a Condition, select the Condition to be deleted and then select the Delete button. The system will check to see if the Condition is assigned to an asset. If so, the system will not allow the Condition to be deleted. You may inactivate the Condition to prevent it from being assigned to future assets if you desire.

To leave the process, select the ☒ in the upper right corner of the screen.

Facility Administration



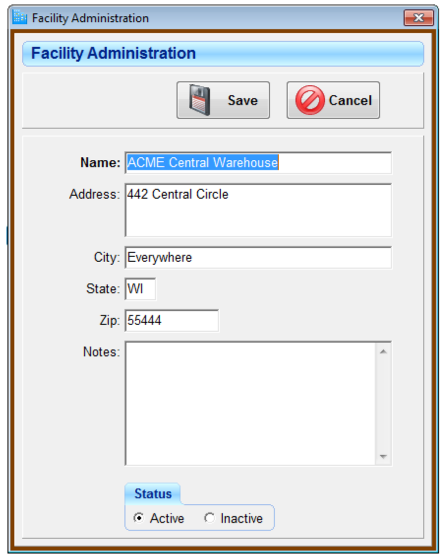
Facilities are the upper hierarchy of locations. In other words, locations are tied to a facility. Due to this structure, at least one facility is required by the system.

To begin the process, select Facility Administration from the Support menu. The screen shown will appear.

Activities available for Facilities are:

- Adding a new Facility,
- Editing an existing Facility, or
- Deleting an existing Facility.

Adding a New Facility
To Add a new facility, select the Add button.



Facility information consists of:

- Name may be up to 40 characters and is required. The Name must be unique (i.e., no other Facilities may have the same Name).
- Address may be up to 40 characters long and is not required.
- City may be up to 40 characters long and is not required.
- State may be up to 2 characters long and is not required.
- Zip may be up to 10 characters long and is not required.
- Notes may be up to 255 characters long and is not required.
- A Facility set as active is available for assignment of locations.
- A Facility set as inactive will not be available for assignment of locations.

Enter the information as desired. Select the Save button to save the new Facility.

Select the Cancel button to exit the Facility addition without saving the new Facility.

In either case the main screen, shown at the beginning of this section will appear. If the Facility was saved, the new Facility will appear on the Facility list.

Edit an Existing Facility
To Edit a Facility, select the Facility of interest and then select the Edit button.

The information on this screen was defined in the Add section above.

Modify the information as desired. Select the Save button to save the Facility changes. Select the Cancel button to exit the Facility addition without saving the Facility changes. In either case the main screen, shown at the beginning of this section will appear. If the Facility was saved, the changed Facility will appear on the Facility list.

To delete a Facility, select the Facility to be deleted and then select the Delete button. The system will check to see if a location is tied to the Facility. If so, the system will not allow the Facility to be deleted. You may inactivate the Facility to prevent a location from being assigned to it in the future if you desire.

To leave the process, select the ☒ in the upper right corner of the screen.

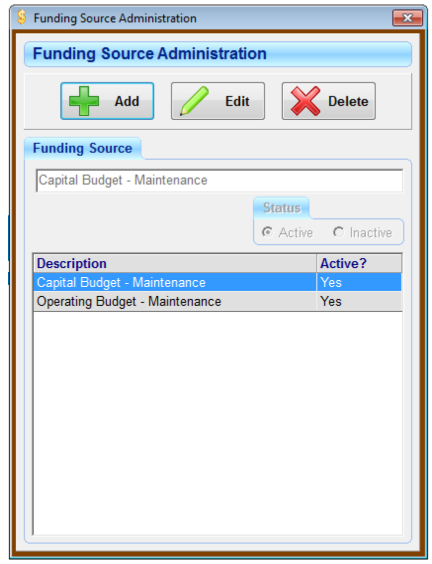
Funding Source Administration

Funding Source Administration is used to keep track of the agency that provided the asset. The Funding Source is not required to use ATS. Note that the name “Funding Source” can be changed on the Setup Options screen.

To begin the process, select Funding Source Administration from the Support menu. The screen shown will appear.

Activities available for Funding Source are:

- Adding a new Funding Source,
- Editing an existing Funding Source, or
- Deleting an existing Funding Source.



Adding a New Funding Source
To Add a new Funding Source, select the Add button. Enter the description, then select the Save button. Select the Cancel button to exit the Funding Source addition without saving the new Funding Source.

Editing an Existing Funding Source
To Edit a Funding Source, select the Funding Source of interest and then select the Edit button.

Modify the information as desired. Select the Save button to save the Funding Source changes. Select the Cancel button to exit the Funding Source addition without saving the changes.

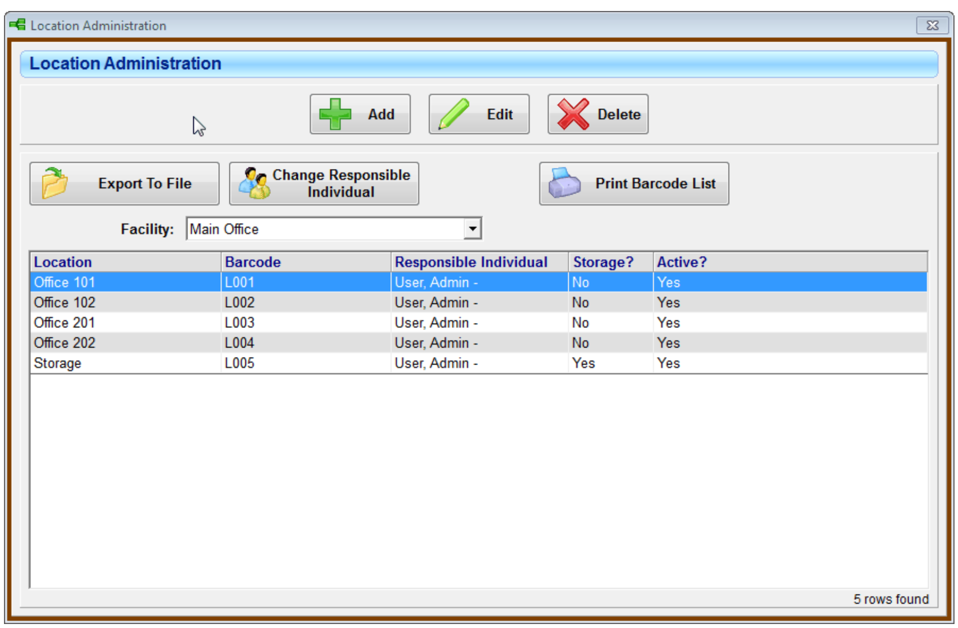
To delete a Funding Source, select the Funding Source to be deleted and then select the Delete button. The system will check to see if the Funding Source is tied to an asset. If so, the system will not allow the Funding Source to be deleted. You may inactivate the Funding Source to prevent it from being assigned to an asset in the future if you desire.

To leave the process, select the ☒ in the upper right corner of the screen.

Location Administration

An asset may be assigned to a location or a user. Location Administration is used to manage the locations to which assets may be assigned.

To start the process, select Location Administration from the Support menu. The screen shown will appear. It displays all the locations that exist in the system that are tied to the facility selected.



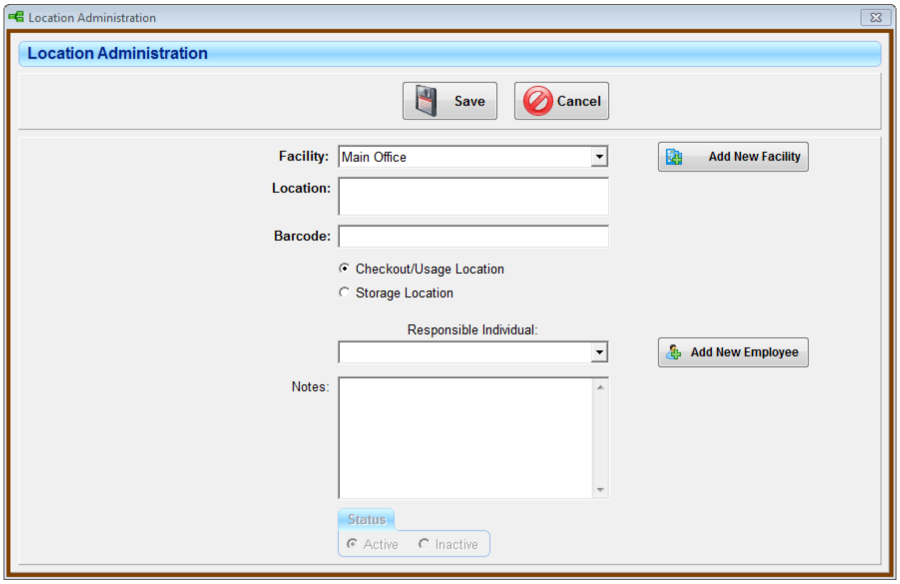
Activities available for Locations are:

- Adding a new Location,
- Editing an existing Location,
- Deleting an existing Location,

- Printing a Barcode List, or
- Printing a label for a Location.

Adding a New Location

To add a new Location, select the Facility to which it is to be added and then select the Add button. The screen will change as shown.



Location information consists of:

- Facility, which defaults to the facility selected on the main form but may be changed. Location (name) may be up to 50 characters and is required. The Location (name) must be unique for the Facility selected (i.e., no other Location tied to the facility may have the same Location (name)).
- Barcode may be up to 15 characters long and is required. The barcode is used by scanners to speed up check in, check out and inventory processes.
- Storage Location is a check box that is used to identify locations that are for storage rather than usage.
- Responsible Individual is a selection process to assign a User to be responsible for the assets in the location. This is not required. If the responsible individual is not in the system, you may go directly to the User Administration process by selecting the Add New Employee button.
- Notes may be up to 255 characters long and is not required.
- A Location set as active is available for asset assignment.
- A Location set as inactive will not be available for asset assignment.

Enter the information as desired. Select the Save button to save the new Location. Select the Cancel button to exit the Location addition without saving the new Location. In either case the main screen, shown at the beginning of this section will appear. If the Location was saved, the new Location will appear on the Location list.

Editing an Existing Location

To Edit a Location, select the Facility containing the Location, select the Location of interest and then select the Edit button. The same screen will appear with the selected data. The information on this screen was defined in the Add section above. Modify the information as desired. Select the Save button to save the Location changes.

Select the Cancel button to exit the Location addition without saving the Location changes.

In either case the main screen, shown at the beginning of this section will appear. If the Location was saved, the changed Location will appear on the Location list.

To delete a Location, select the Location to be deleted and then select the Delete button. The system will check to see if an asset is tied to the location or the Location is being used in a history record. If so, the system will not allow the Location to be deleted. You may inactivate the Location to prevent an asset from being assigned to the Location in the future if you desire.

A barcode list can also be printed by selecting the Print Barcode List button. This report contains location barcodes for the selected Facility that can be scanned with a corded or handheld scanner. Only active locations will appear on the list.

To print a Location label, select the location(s) to be printed and then select the Print Label button. If a label printer has been selected and if a default location label has been designated (see Label Design/Label Setup in this manual), the label(s) will be printed.

For label printing, multiple locations may be selected. To select multiple locations, do one of the following:

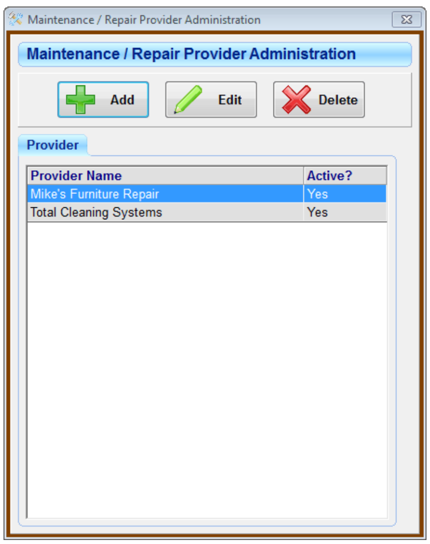
- Drag the mouse over the locations desired while holding down the left mouse button.
- Select the first location by left clicking with the mouse. Select the last location in a range by holding down the Shift key and the left clicking on the last location. All locations in between will be selected.
- Hold down the Control (Ctrl) key and select the locations you wish to print by left clicking on each one with the mouse.

To leave the process, select the ☒ in the upper right corner of the screen.

Maintenance / Repair Provider

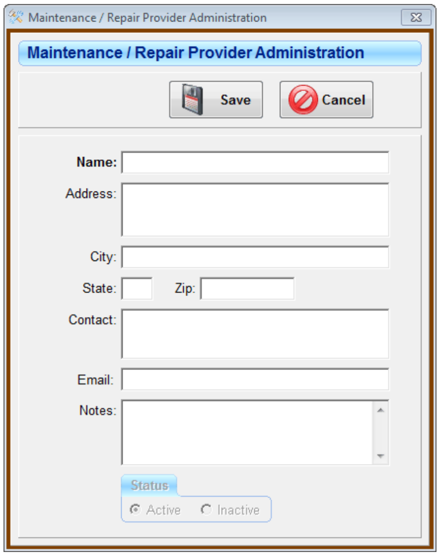
A Maintenance / Repair Provider Screen allows you to standardize the name of each provider who services your equipment. You can Add new provider names, edit the name, and delete those providers not already used for prior maintenance. You can also inactivate a company who is no longer on your list of approved maintenance providers.

To start the process, select Maintenance/Repair Provider Administration from the Support menu. The screen shown will appear.



Adding a New Maintenance/Repair Provider

To add a new Maintenance/Repair Provider select the Add button. The screen shown below will appear.



Provider information consists of:

- Name may be up to 50 characters long and is required.
- Address may be up to 100 characters long and is not required. If an address is entered, it will appear on the Maintenance Request report.
- City may be up to 40 characters long.
- State may be up to 2 characters long.
- Zip may be up to 10 characters long.
- Contact may be up to 100 characters long.
- Notes may be up to 255 characters long.

Enter the information as desired. Select the Save button to save the new Provider. Select the Cancel button to exit the Provider addition without saving the new Provider. In either case the main screen, shown at the beginning of this section will appear. If the Provider was saved, the new Provider will appear on the Provider list.

Editing an Existing Provider
To Edit a Provider, select the Provider of interest and then select the Edit button. The same screen will appear with the selected data. The information on this screen was defined in the Add section above. Modify the information as desired. Select the Save button to save the Provider changes.

Select the Cancel button to exit the Provider addition without saving the Provider changes.

In either case the main screen, shown at the beginning of this section will appear. If the Provider was saved, the changed Provider will appear on the Provider list.

To delete a Provider, select the Provider to be deleted and then select the Delete button. The system will check to see if an asset maintenance record is tied to the Provider. If so, the system will not allow the Provider to be deleted. You may inactivate the Provider to prevent its use in the future if you desire.

To leave the process, select the ☒ in the upper right corner of the screen.

Asset Management

The Asset management portion of the process is used to:

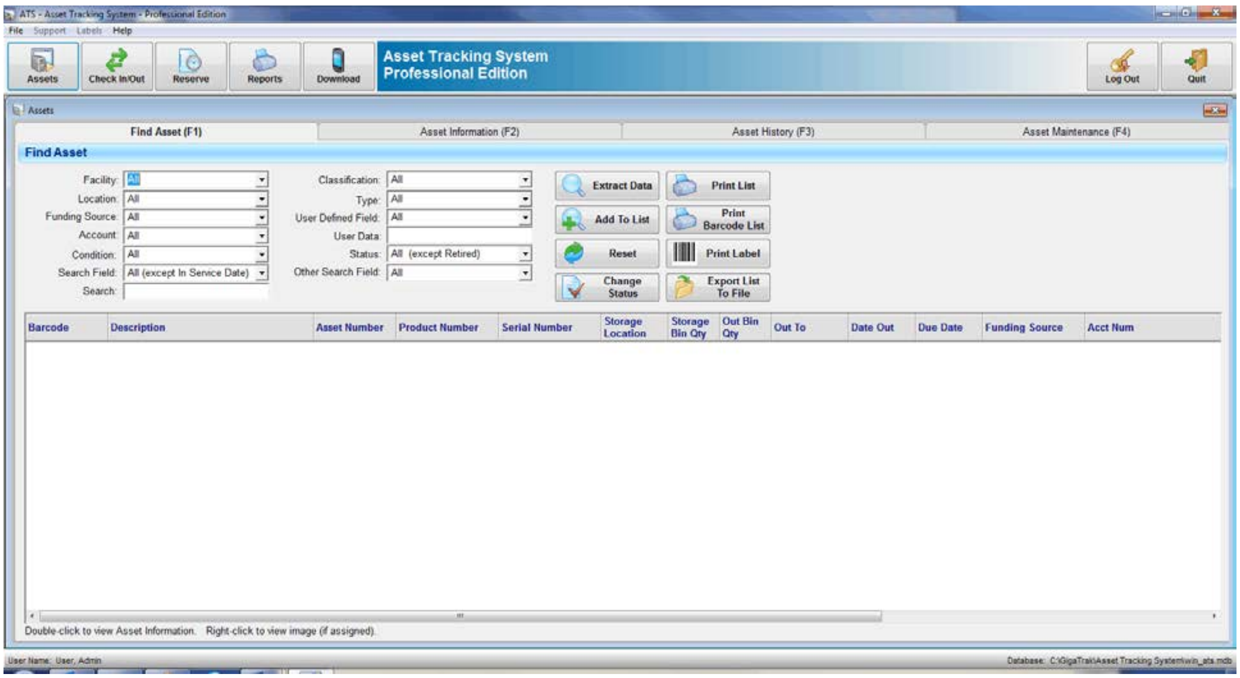
- Add assets to the system,
- Print barcodes for the assets,
- View asset history, and
- Limited reporting.

The Asset management process is started by selecting the Asset button on the main toolbar, which displays the screen below.

The Asset management form is composed of four tabs:

- Find Asset,
- Asset Information,
- Asset History, and
- Asset Maintenance.

Find Asset (F1)



The first tab, shown above, is used to view assets, print a list of assets, and print asset labels. The list of Assets on the screen is controlled by the multiple selections on the upper part of the form. These selections are:

- Facility
- Location
- Funding Source
- Account
- Search (by barcode, description, model number, serial number, and in service date)
- Classification
- Type
- User Defined Field
- User Data (for the selected User Defined Field)
- Condition
- Status

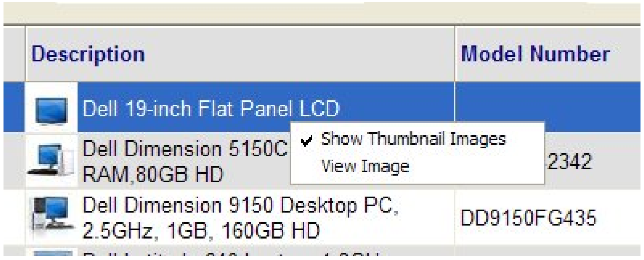
All of these selections are administered under the support menu of the main form. Each is tied to an asset in the Asset Information tab of this form. Select the parameters of choice and then select the Extract button to change the asset display.

Groups of assets can also be displayed by typing words in the Search Description box, and then selecting the Extract button. For example, type the word chair into the box and click Extract. Only assets that have the word chair in the description will be displayed. If a Location is also selected, only assets that are located at that location and have the word chair in the description will be displayed.

By selecting different filters and clicking the Add To List button, you can create a custom list to fill any need. This button allows you to add additional assets to the asset grid without clearing it first. A row can be removed from the grid by selecting it and pressing the “Delete” key on the keyboard. This does NOT delete any information from the database.

Several key aspects are available on the form. As an example, selecting the Reset button will return all selections to All. In addition, the Asset list can be sorted by one of its columns by clicking on the heading of that column. A second click will reverse the sort order of the items in the listing.

If an image is assigned to an asset, a thumbnail picture will be displayed in the Description column of the grid. The thumbnail display can be turned on or off by right-clicking in the grid and selecting “Show Thumbnail Images” in the popup menu.



A larger view of the image can be displayed by selecting “View Image” from the popup menu.

To find a specific Asset by its barcode:

- Select Barcode in the Search Field box.
- Select the Search text box (background turns yellow).
- Type in the barcode and select the Enter key or scan the barcode with a wedge type barcode scanner attached to the PC. You can also select the Extract Data button to display the asset.
- If the barcode matches that of an Asset, the Asset will appear on the list.

To find assets by the in service date:

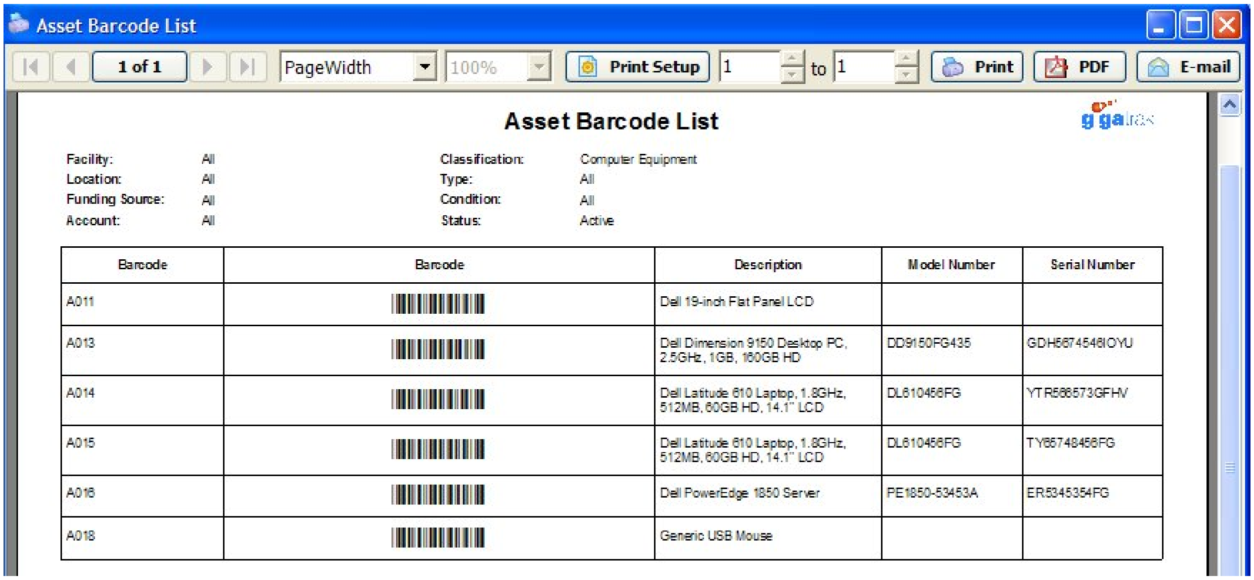
- Select In Service Date in the Search Field box.
- The Search text box will automatically default to a date range of the first and last days of the current month. This allows you to quickly find the assets that were added during the current month.
- You can enter a single date to find assets that were entered on a particular day.
- Select the Extract Data button to display the assets.

The status of a group of selected assets can be changed all at once instead of just one asset at a time. Select the rows in the grid of the assets you want to change. Then click the Change Status button. A pop-up screen will appear where you can select the new status. Click the OK button to proceed. Note that binned items cannot be changed to a status of Lost or Broken.

Note that the Status column in the grid does not display a status of Active. This makes any status that is not Active stand out.

To print the Assets in the list, select the Print List button. A report is displayed and if the default printer is set, the Assets displayed on the screen will be printed when Print is selected. You may also PDF or Email the report directly.

A barcode list can also be printed by selecting the Print Barcode List button. This report contains asset barcodes that can be scanned with a corded or handheld scanner.



Asset Barcode List

Facility:	All	Classification:	Computer Equipment
Location:	All	Type:	All
Funding Source:	All	Condition:	All
Account:	All	Status:	Active

Barcode	Barcode	Description	Model Number	Serial Number
A011		Dell 19-inch Flat Panel LCD		
A013		Dell Dimension 9150 Desktop PC, 2.5GHz, 1GB, 160GB HD	DD9150FG435	GDH5674546IOYU
A014		Dell Latitude 610 Laptop, 1.8GHz, 512MB, 60GB HD, 14.1" LCD	DL610456FG	YTR566573GFHV
A015		Dell Latitude 610 Laptop, 1.8GHz, 512MB, 60GB HD, 14.1" LCD	DL610456FG	TY65748456FG
A016		Dell PowerEdge 1850 Server	PE1850-53453A	ER5345354FG
A018		Generic USB Mouse		

To print asset labels:

- Select one or more Assets in the list,
- Select the Print Label button.

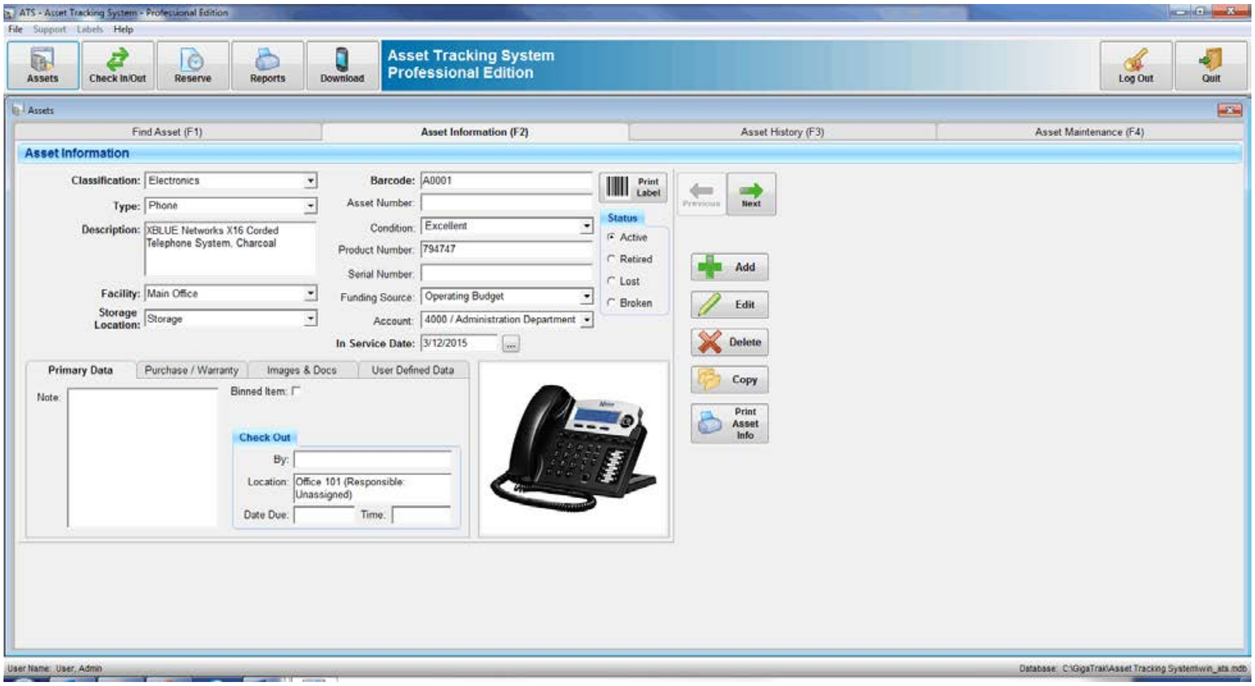
For label printing, multiple Assets may be selected. To select multiple Assets, do one of the following:

- Drag the mouse over the Assets desired while holding down the left mouse button.
- Select the first Asset by left clicking with the mouse. Select the last Asset in a range by holding down the Shift key and the left clicking on the last Asset. All Assets in between will be selected.
- Hold down the Control (Ctrl) key and select the Assets you wish to print by left clicking on each one with the mouse.

The asset list can be exported to a comma delimited CSV file. This file can be opened in Microsoft Excel.

Asset Information (F2)

Selecting an Asset and then selecting the Asset Information tab, or double-clicking on an Asset, will bring up the Asset Information screen below.



As a note, the Asset Information screen changes slightly if the Check In/Out option on the System Status screen is set to Relocate Assets.

Asset information with bold text above is required. Many of the fields listed below are included in the sub-tabbed section in the lower portion of the form. The available asset information is:

- Classification is a method of grouping Assets.
- Type is a subset of Classification and a second method of grouping Assets.
- Description is up to 80 characters describing the Asset.
- Facility is the building in which the Asset is located.
- Storage Location is the default storage location for the Asset.
- Funding Source is the agency that provided the Asset. (User Definable Field.)
- Binned Item is used for small items that cannot be individually bar coded. If the Binned Item checkbox is checked, a box will appear to enter a Bin Quantity. There will also be an option to set the item as a Consumable. Consumable assets can be checked out, but are not expected to be checked back in (e.g., gloves). Note that Binned Item is not available when the Relocate option is selected on the Setup Options screen.
- Original Value is the cost basis for depreciating the Asset.
- Current Value is the current depreciated value of the Asset (calculated).
- Date for Current Value is the date used to calculate the current value.
- Depreciation period in years (does not apply to bin items).
- Straight Line Depreciation Type. The system will calculate depreciation based on five methods: Straight Line, MACRS Half-Year straight Line, MACRS Mid-Quarter Straight Line, MACRS Double Declining Half Year, MACRS Double Declining Mid Quarter.
- Barcode is the barcode that identifies the Asset. You must enter the first asset's barcode number manually in a format that all barcodes will use (i.e. A00001). The system will then automatically increment the numerical portion of the barcode number one at a time.
- Condition is the physical condition of the Asset. Condition does not apply to bin items.

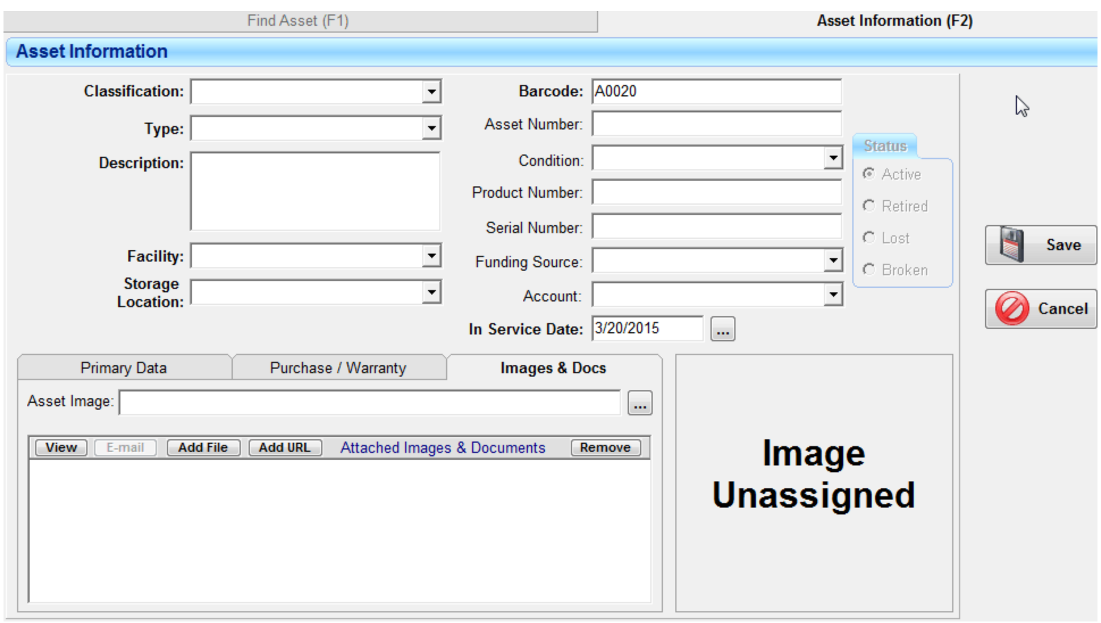
- Model is the model number of the Asset.
- Serial Number is the Serial Number of the Asset.
- Image is the path to a file that contains a picture of the asset. If the image information is entered and a file is at the proper location, the picture will be displayed as a thumbnail in the area to the right of the check out section (see above). Double clicking on the thumbnail will display a full sized image of the picture. In addition, linked document, PDF, and other related files can be assigned to the Asset.
- Note is up to 255 characters of information about the Asset.
- Account is the account number used to purchase the Asset.
- Purchased From allows entry of general supplier information.
- Warrant expiration date tracks when a warranty period expires.
- User Defined Fields stores additional information specific to the type of Asset.
- Status. An Active asset may be checked out. A Retired, Lost, or Broken Asset may not be checked out.
- Check Out is whether an Asset is checked Out or not. If it is checked out, the following information will be available:
- By is the User to whom the Asset was checked out.
- Location is the Location to which the Asset was checked out.
- Due Date is the date the Asset is due to be checked in.

Administrative actions for an Asset are:

- Add a new Asset,
- Edit an existing Asset,
- Delete an existing Asset,
- Copy the Asset information to be used in creating a new Asset,
- Print Asset information, or
- Depreciating an Asset.

Adding a New Asset

To Add a new Asset, select the Add button. The screen will be changed as indicated below.



All information is cleared and the Save and Cancel buttons appear.

The system will automatically generate a unique barcode for the asset. If this barcode is unacceptable, it can be typed over by the user. Select or enter the required information (bold labels). Enter the non-required information if desired. Save the Asset by selecting the Save button. The screen will return to the original state with the new Asset information.

Cancel the process without saving by selecting the Cancel button. The screen will return to the original state with the information displayed that was present prior to selecting the Add button.

Editing an Existing Asset
To Edit an existing Asset, select the Edit button.

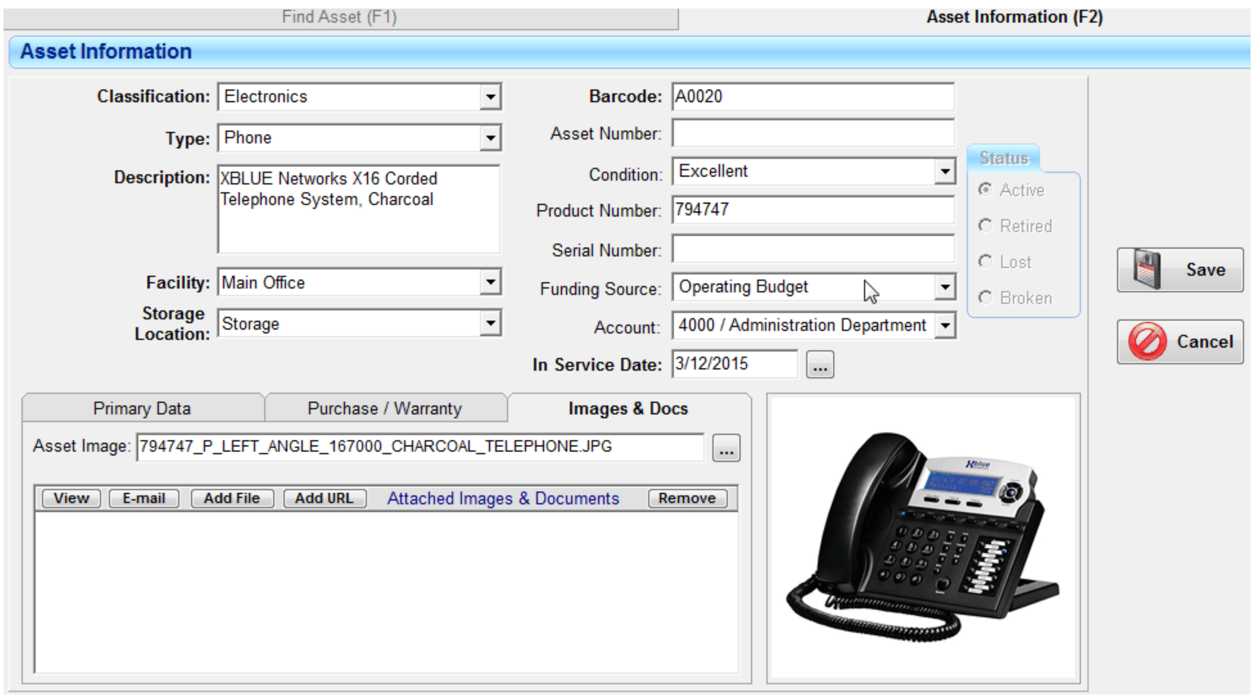
The Save and Cancel buttons appear.

Change the Asset's information as desired. Information with a bold label is required. Save the Asset by selecting the Save button. The screen will return to the original state with the changed Asset information.

Cancel the process without saving by selecting the Cancel button. The screen will return to the original state with the Asset information unchanged.

Copying an Existing Asset's Information to a New Asset
This is one of the most helpful features when multiples of the same type of asset needs to be entered. To Copy an existing Asset's information to use in creating a new asset, select the Copy button. The majority of data is copied to a new record. The exception is that the barcode number, serial number and checkout information is cleared and the Save and Cancel buttons appear.

The screen will be changed as indicated below.



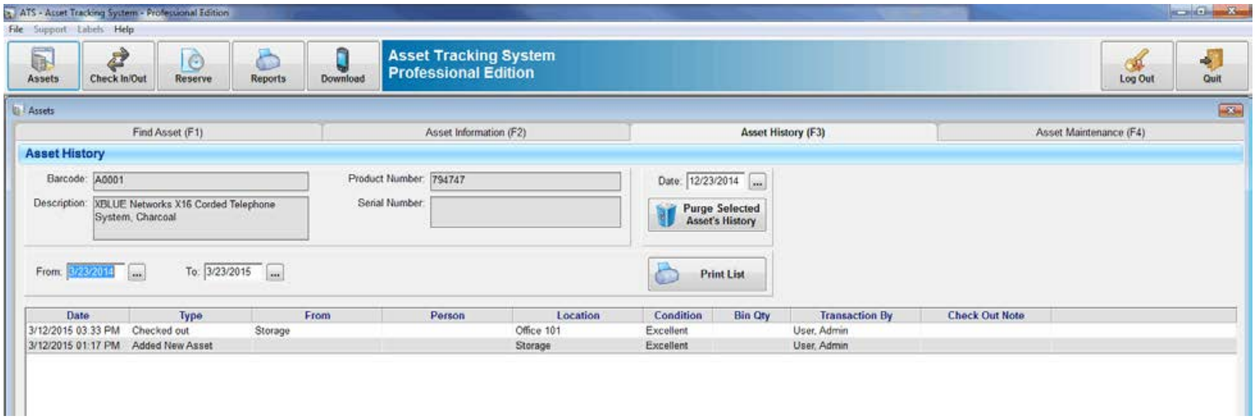
The system will automatically generate a unique barcode for the asset. If this barcode is unacceptable, it can be typed over by the user. Change the Asset's information as desired and add the new barcode. Save the Asset by selecting the Save button, the screen will return to the original state with the new Asset information.

Cancel the process without saving by selecting the Cancel button. The screen will return to the original state with the Asset information unchanged.

To Delete an existing Asset, select the Delete button. After asking if you are sure, the system will delete the asset.

Asset History (F3)

Selecting an Asset and then selecting the Asset History tab will bring up the Asset History screen below.



The screen displays the history of the selected asset for the date range selected. The system defaults the date range to the last 12 months. Change one of the dates and select the Enter key or select a new date with one of the calendar controls and the list will change to reflect the new date range.

To print the history displayed on the screen, select the Print List button.

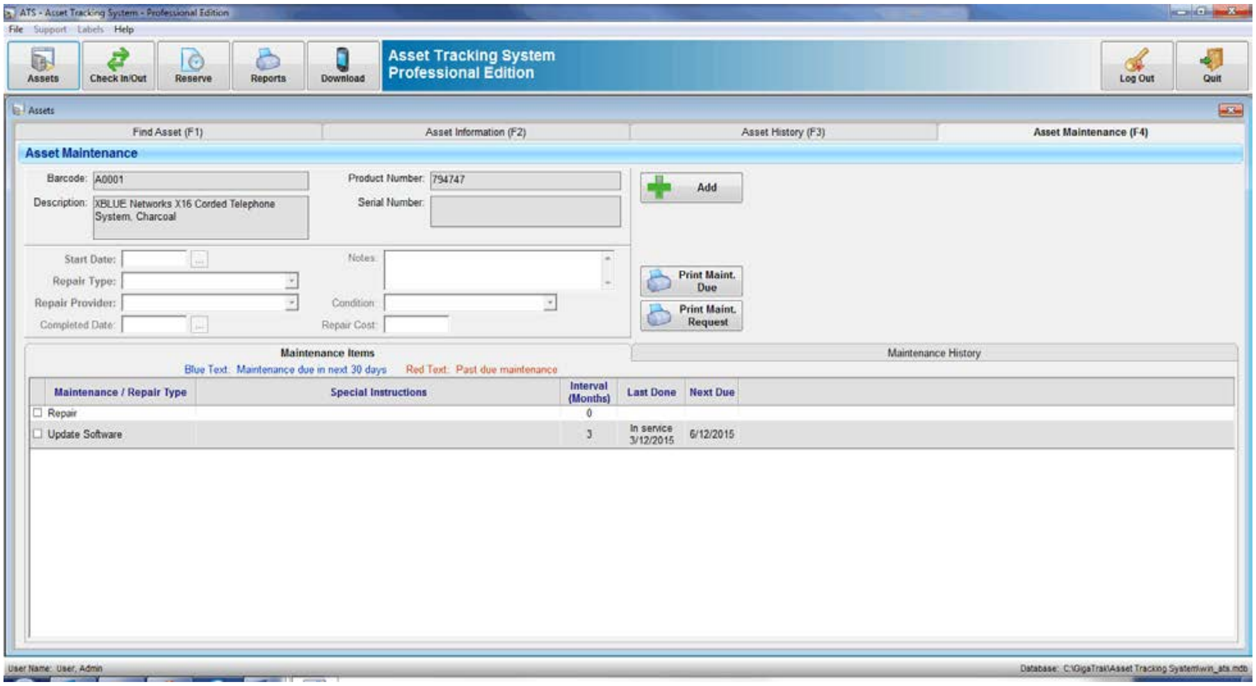
To remove all history records for the selected asset prior to a specified date, enter the date in the Date text box and then select the Purge button. All history records for the asset prior to the date specified will be deleted. The Purge button is only available if the “Allow Delete Asset & Purge History” checkbox is checked on the Setup Options screen.

To leave the process, select the ☒ in the upper right corner of the screen.

Asset Maintenance (F4)

Selecting an Asset and then selecting the Asset Maintenance tab will bring up the Maintenance Items/History screen below.

The first tab lists the Maintenance/Repair Type(s) setup previously on the Asset Support Administration screen. Special instructions, the interval required and the dates last done and due are shown. If the type is due in the next 30 days it will be shown in blue. Note that the Service Reminder Interval (30 days) can be changed on the Setup Options screen. Past due types are in red. Double-click to select a maintenance action and select the Repair Provider then save. The system will offer to print a Maintenance Request form to send with the item to the provider. An “open” maintenance record is then inserted into History. When the item is returned, select the open record on the Maintenance History tab by double-clicking. Now enter the Completed Date along with Notes and a Repair Cost if appropriate. Once saved, it is now a completed record in history.



To print the history displayed on the screen, select the Maintenance History tab, then select the Print Maintenance History button.

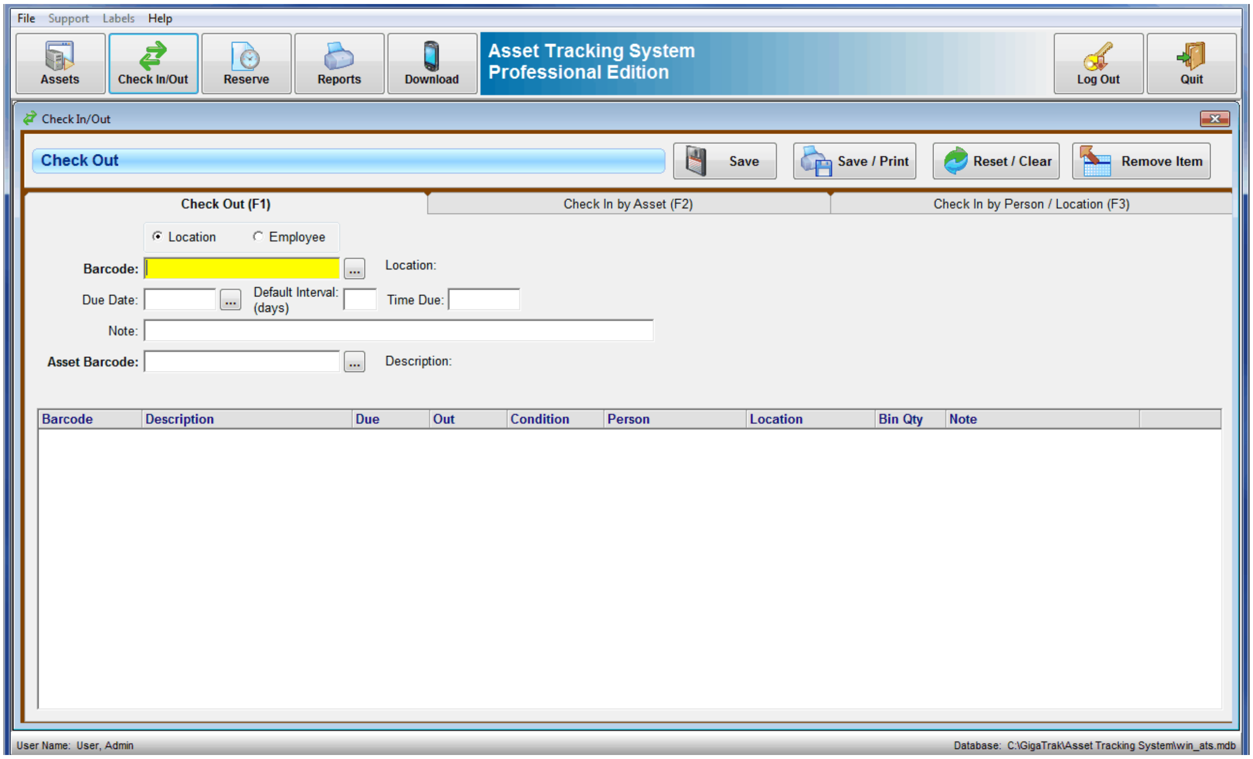
To leave the process, select the ☒ in the upper right corner of the screen.

Check In/Check Out Assets

Check In/Out is available is used to check assets into storage from a user or location. The Check In process is used to check assets into storage from a user or location. The Check Out process is used to check assets out from a user or location to another user or location. Check Out and Check In can also be performed on the handheld unit. To start these processes, select the Check In/Out button. The screen below will be displayed.

Check Out Process

The Check In/Check Out process is composed of three (3) tabs. The first tab is the Check Out process as shown below.



To check out assets:

- Select a Location or Employee to which the asset will be checked out.
- If desired enter the due date for the return of the Asset. Alternately, you can enter the number of days the Asset can be checked out in the Default Interval box. The due date will automatically be calculated.
- Scan the Asset barcode.
- If the Asset is a binned item, a box will appear below the barcode to enter the quantity being checked out.

The asset checkout information will be displayed in the grid. If an image is assigned to the asset, it will appear in the image box. To check out another asset to the same location/employee and with the same due date, scan another asset barcode.

If no scanner is available, you may enter the barcode information into the barcode text boxes and then press the enter key on the keyboard. You may also select the find button next to the textboxes to display a list to choose from.

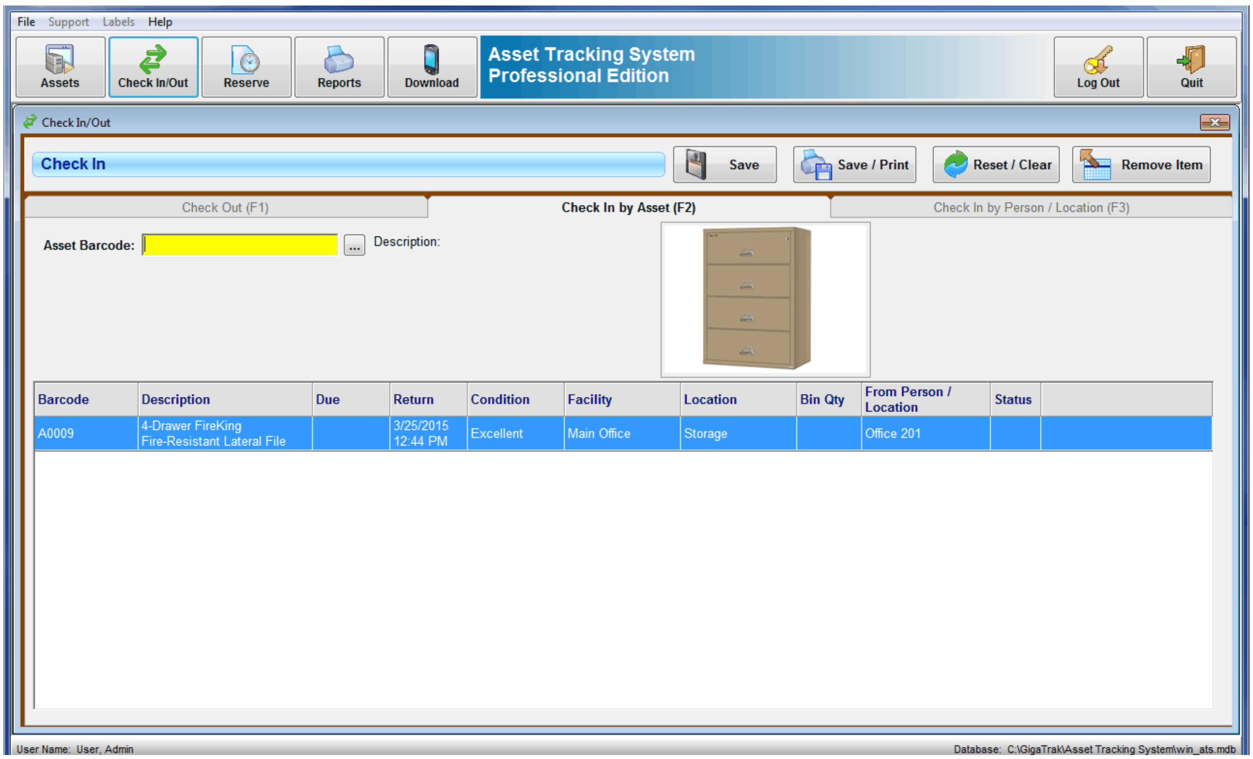
Items that are entered into the grid by mistake can be removed by selecting the item and clicking the Remove Item button.

When all desired assets have been checked out, select the Save or the Save/Print button. Selecting the Save button will save the check out information and clear the check out list. Selecting the Save/Print button will save the check out information and print the check out report. The system will then clear the check out list.

To cancel the check out process, select the Reset/Clear button. After confirming you wish to reset the check out process, the system will clear the check out list without saving it.

Check In Process – By Asset Barcode

To check in an individual asset select the Check In by Asset tab. The screen will change as indicated below.



To check an asset into storage, scan the asset barcode or enter the asset barcode and then press the Enter Key on the keyboard. If the asset is a binned item, a box will appear to enter the quantity being checked in. The check in information will be entered in the list. Condition, Facility, and Storage Location may be changed. Select the column you wish to change, select the Enter key and pick the new Condition, Facility, or Storage Location from the list.

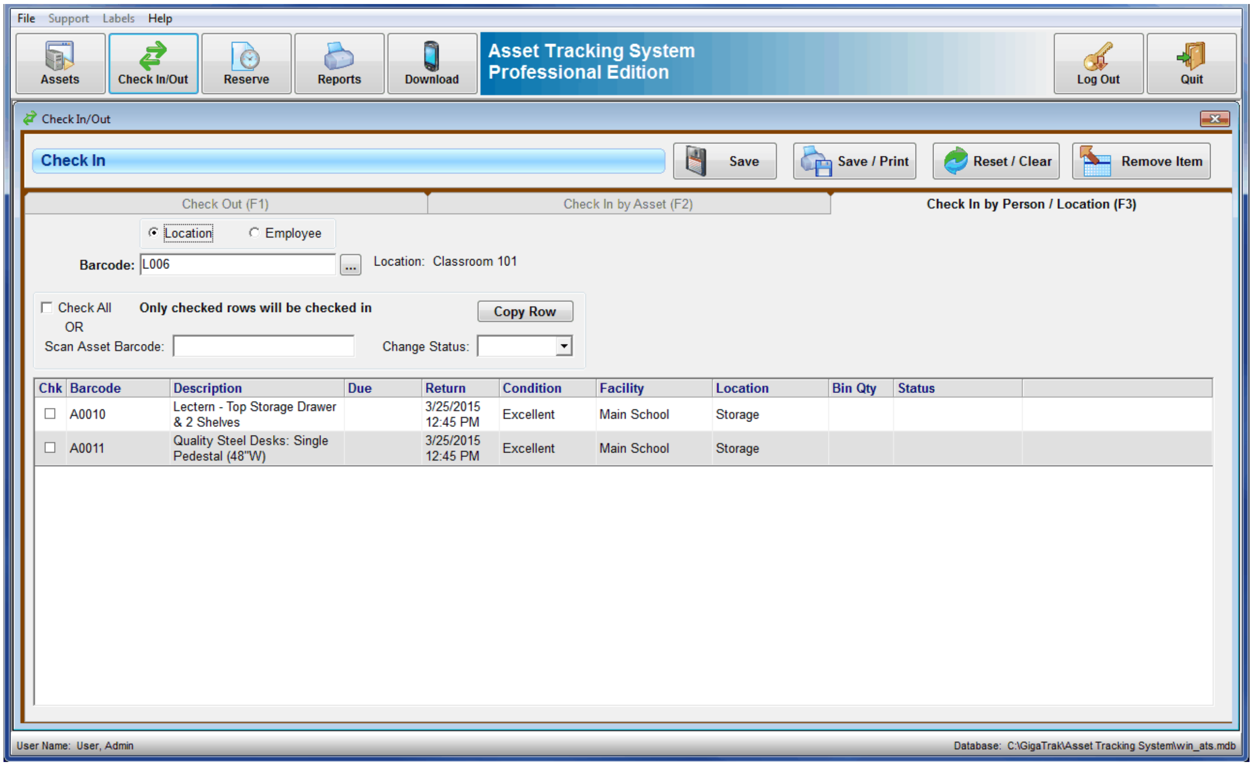
When all assets have been checked in, select the Save or the Save/Print button. Selecting the Save button will save the check in information and clear the check in list. Selecting the Save/Print button will save the check in information and print the check in report. The system will then clear the check in list.

To cancel the check in process, select the Reset/Clear button. After confirming you wish to reset the check in process, the system will clear the check in list without saving it.

To leave the process, select the ☒ in the upper right corner of the screen.

Check In Process – By Person / Location

To check in assets assigned to either an employee or a location select the Check In by Employee / Location tab. The screen will change as indicated below.



To check an asset into storage, first select or scan the employee or location ID the items are being returned from. A listing of all items checked out to the employee/location will be displayed. You can then click the check box for each line item being returned. If all items are being returned, select the Check All check box. This will select all of the line items for check in. The Status of all checked line items can be changed with a single click. Select a new status in the Change Status drop down list. After confirming the change status message, the new status will appear in the Status column of the grid. The status of a single line item can also be changed by double clicking the Status column of the line item. Select a new status from the drop down list that will appear. Binned item quantities can also be changed in the grid if desired. The Copy Row button is used only for binned items. This is useful if more than one item was checked out, but one or more of the items was lost or broken and cannot be checked in. Select the bin item in the grid and select the Copy Row button. An identical row will appear in the grid. Change the Bin Qty and Status as necessary and check the check box in the first column.

When all assets have been checked in, select the Save or the Save/Print button. Selecting the Save button will save the check in information and clear the check in list. Selecting the Save/Print button will save the check in information and print the check in report. The system will then clear the check in list.

To cancel the check in process, select the Reset/Clear button. After confirming you wish to reset the check in process, the system will clear the check in list without saving it.

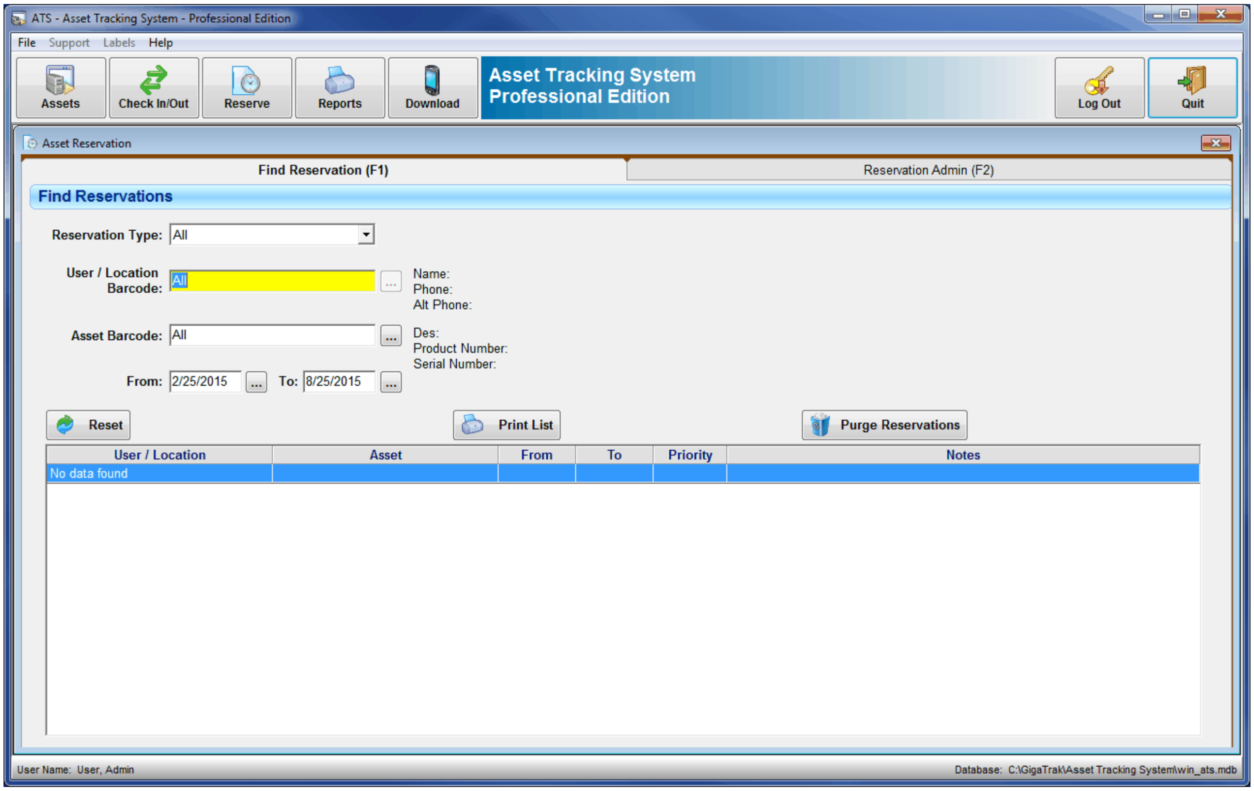
To leave the process, select the ☒ in the upper right corner of the screen.

Check In can also be performed on the handheld unit.

Reserving Assets

Reserving Assets is a process used to reserve the use of an asset for a specified period of time. This is not available in the Starter edition. To start this process, select the Reserve button. The screen below will be displayed, showing all reservations that fall within the default date range (one month prior to the current date and five months after the current date).

The Reserve Assets process is composed of two (2) tabs.



Find Reservation (F1)

The first tab is the Find Reservations process as shown. The find reservation process is used to view the current reservations for an Asset or User.

The Reservation Type determines the type of reservations to display. Choose from All, Location, or Employee.

To view the reservations for a User, scan the User barcode into the User Barcode textbox and the reservations for the User in the date range specified will be listed.

To view the reservations for an Asset, scan the Asset barcode into the Asset Barcode text box and the reservations for the Asset in the date range specified will be listed.

If no scanner is available, you may also enter the barcode in the barcode text boxes followed by pressing the Enter key on the keyboard. Another option is to select one of the find buttons, to display a list from which you may select.

If the Reservation Type is an employee, there will be the  button to search a list of users. Enter an employee barcode and select the Extract Data button. If a matching barcode is found, the employee will appear in the list. Alternately, you can enter a Last Name and select the Extract Data button. All employees with the entered last name will appear in the list. Select the user desired and then select the OK button. You may notice that All is available. If you select all, then the reservations for everyone will be displayed.

Select the Cancel button to return to the reservation process without selecting a user.

If the Reservation Type is a location, there will be the ... button to search a list of locations. If the Reservation Type is All, the Find button will be disabled.

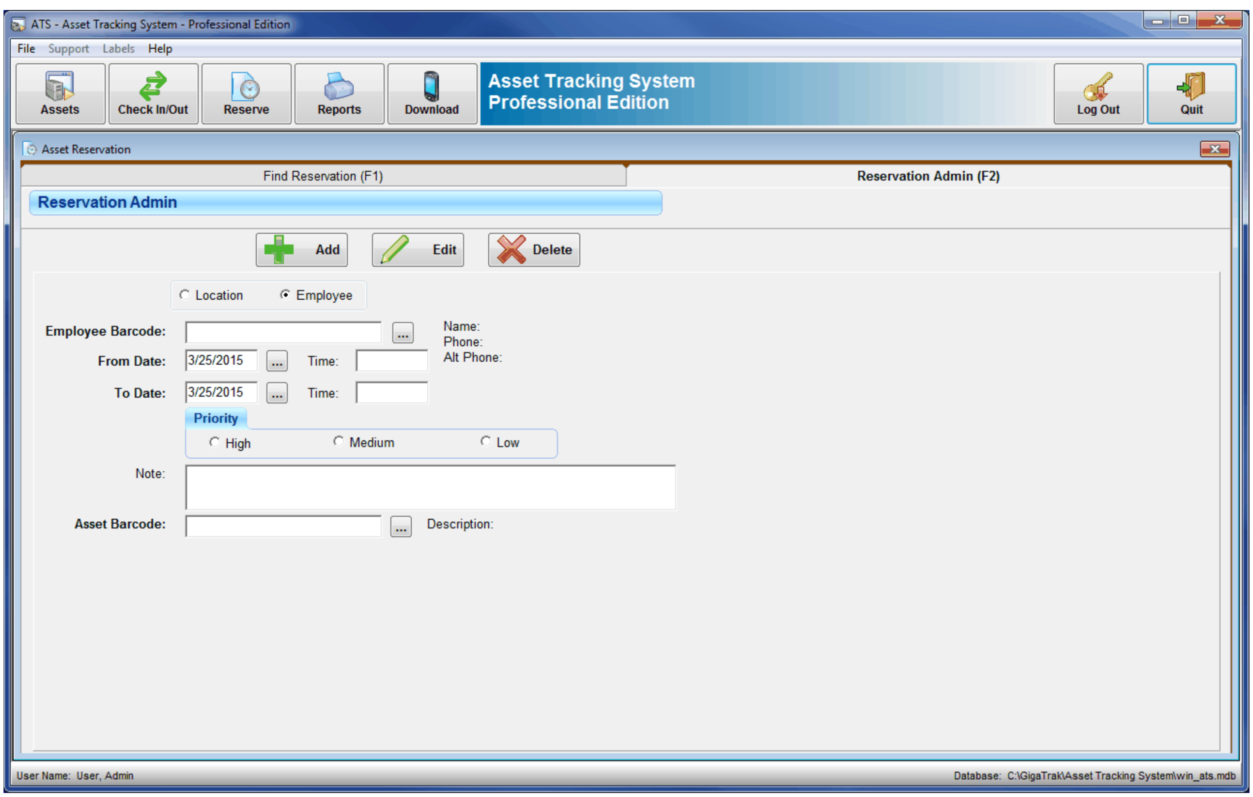
If the Reservation Type is an asset, there will be the ... button to search a list of assets. Select the asset desired, and then select the OK button. You may notice that All is available. If you select all, then the reservations for all assets will be displayed.

Select the Cancel button to return to the reservation process without selecting an asset.

To change the date range for the reservation list, enter a new date and then select the Enter key or set the date using the calendar control. The list will change to reflect the new date range.

The Reset button will return the screen to the default settings.

The Purge Reservations button will remove expired reservations from the system. Expired reservations are those that have a “To Date” that is older than the default “From Date”. They do not appear on the screen when the Reservation form is opened. They can be displayed by setting the “To Date” back to an earlier date. A message will appear on the screen to confirm the purge operation. It will also show the number of reservations that will be removed. Respond “Yes” to the message to remove the records.



Reservation Admin (F2)

The second tab is the Reservation Admin process, as shown. The Reservation Admin process is used to add new reservations and edit or delete existing reservations.

To add a new reservation:

- Select the Reservation Admin tab.
- Select the Add button, the screen changes as indicated below.
- Select the Location or Employee option.
- Scan the Location/Employee barcode or select the Find button.
- Scan the Asset barcode or select the asset Find button.
- Set the date range for the reservation.
- If you desire, add a note and set the priority.

Select the Save button to save the reservation. The screen will return to the initial display with the new reservation information.

To cancel without saving, select the Cancel button. The screen will return to the initial display.

To edit an existing reservation:

- Find the reservation in the Find Reservation process.
- Select the Reservation of interest.
- Select the Reservation Admin tab.
- Select the Edit button.
- Modify the information as desired.

Select the Save button to save the reservation. The screen will return to the initial display with the changed reservation information.

To cancel without saving, select the Cancel button. The screen will return to the initial display.

To delete an existing reservation:

- Find the reservation in the Find Reservation process.
- Select the Reservation Admin tab.
- Select the Delete button.

After verifying the deletion, the system will delete the reservation.

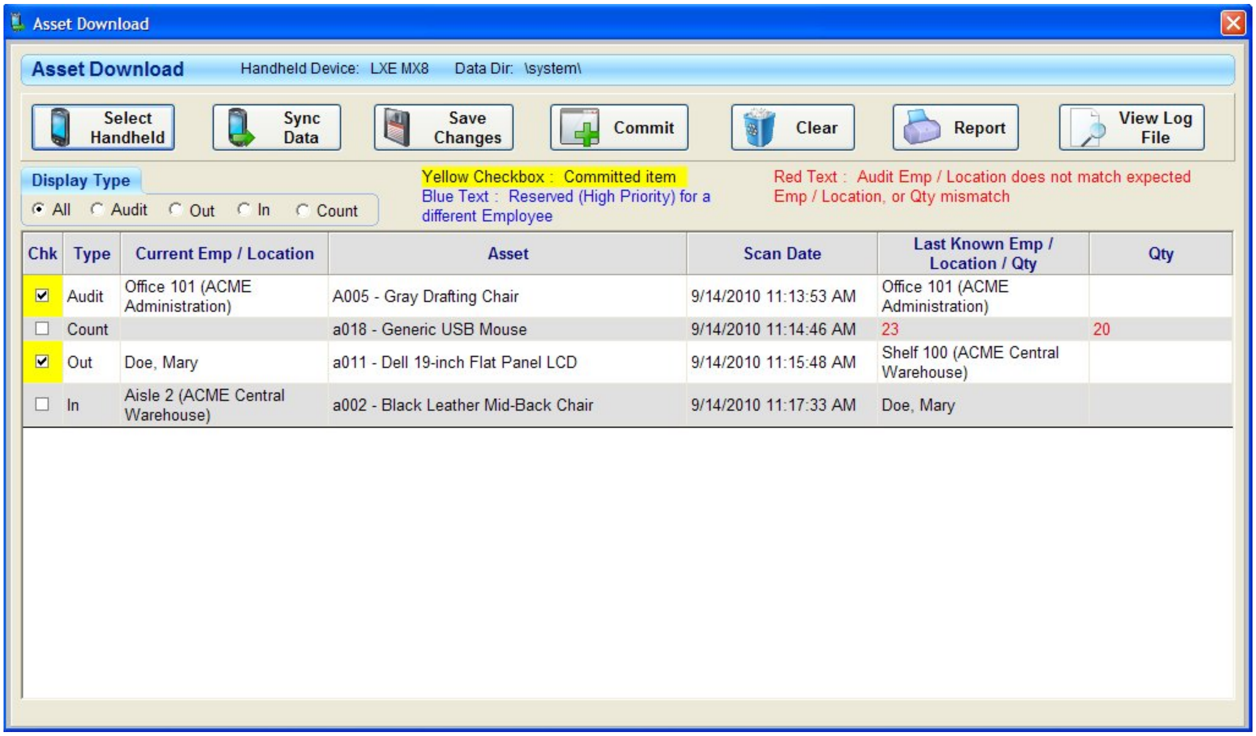
To leave the process, select the ☒ in the upper right corner of the screen.

Download Handheld

The system provides for a handheld scanner download process. The user must first configure the PC for the handheld in use (See Handheld Configuration). The Handheld Configuration screen can be displayed by choosing the Select Handheld button. The selected handheld device is shown in the blue banner of the Download screen.

Check in/out records can be mixed with audit records and count records on the handheld unit. When the unit is downloaded, the records will be shown with the appropriate type displayed. The records displayed can be limited to a specific type by clicking the appropriate Display Type button.

When a handheld unit is ready for download, select the Download button from the main screen. The form below is displayed.



Batch handhelds must be loaded with a reference file before they can be used. Dock the handheld to the host PC and select the Sync Data button. **Handhelds should be synced with the PC before each use to ensure that they have the latest data.**

If there are download records stored in the temporary database table, the grid will display the existing downloaded records. New handheld records can be added as long as the existing download has not started the commitment process. If commit has been started or the handheld audit is separate from the existing audit, then the existing records must be completed and cleared from the database prior to uploading the new handheld records.

To download handheld data:

- Place the handheld in the downloader.
- Select the Sync Data button.
- Follow the on-screen instructions.

If the download is successful, the grid will be rebuilt with the new records. If the records were downloaded successfully but there were some problems, the system will provide a message and the problems will be documented in a log file. This file can be viewed and printed by selecting the View Log File button. Note that the log file will be deleted whenever a new Sync Data function is performed.

There could be some erroneous data in the grid. Therefore the system will only commit those records that have the Chk column checked. During download the system will check those records where the audited location matches the expected location, however the user may change the value if desired. This allows the user to control what records will be loaded into the database. If the audited location does not match the expected location, the text will be displayed in red.

The Save Changes button will save the changes in the Chk column to the temporary audit table in the database. This does not change any asset data.

If a checkout record is recorded on the handheld for an item that has a high priority reservation for a different employee than the one entered on the handheld, the text will be displayed in blue. The Chk column can be manually checked to allow the checkout of the item to the scanned employee, but this is not recommended. Always check with the employee who originally reserved the item on the Reservation screen before allowing the item to be checked out.

The Commit button will save the information in the downloaded records that have been checked to the permanent portion of the database. The background color of the checkbox will turn yellow after those records have been committed. The Commit function may be performed several times. Records that were previously committed will be skipped. Once a Commit function has started, no further downloads will be accepted from a handheld until the downloaded records are cleared.

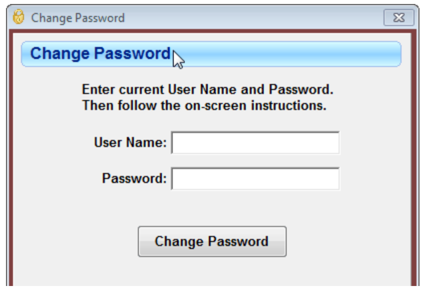
IMPORTANT! -- The Commit function changes asset data. A message will appear to alert the user to sync all handhelds with the PC to update the reference file on the handheld.

The Clear button will remove all records from the temporary download table in the database, making way for new download information. The system displays a warning message prior to clearing the records.

The Report button will print a report of the records displayed on the grid.

Change Password

A user currently logged into ATS may change their password at any time. Select Change Password from the File menu and the screen shown appears.



Type in your current user name and password and then select the Change password button.

The screen changes as indicated.

Passwords must be at least 5 characters but no greater that 10 characters long.

Type in your new password and then select the Change Password button.

Type in your new password again. If the password matches the new password you typed earlier, the system will save the new password and the Change Password screen will disappear.

If the password does not match the password typed in earlier, the system will state the passwords do not match and ask if you wish to try again,

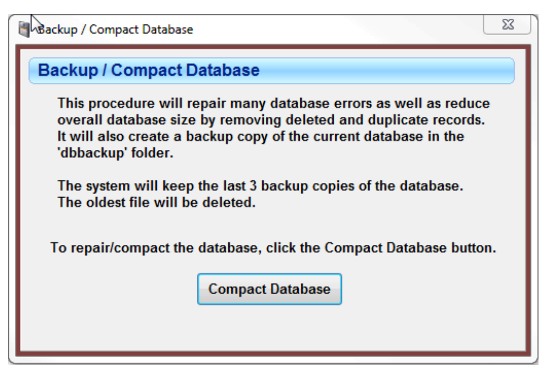
If you answer yes, the screen will be returned to the state above and you may try to type the second password again.

At any time during the process, the user may select the ☒ in the upper right corner of the form to cancel the process.

Backup / Compact Database

If you have the Access version of ATS, Compact Database is used to periodically repair, compact, and backup the ATS database.

It is possible that the Access database can get corrupted. Compacting the database may repair the damage. In addition, a previous compact operation will have created a backup of the database that can be used if the current database is corrupted beyond repair.



The system will retain three backup copies of the database in the dbbackup folder. Backing up frequently will minimize the loss of data if the current database is corrupted beyond repair.

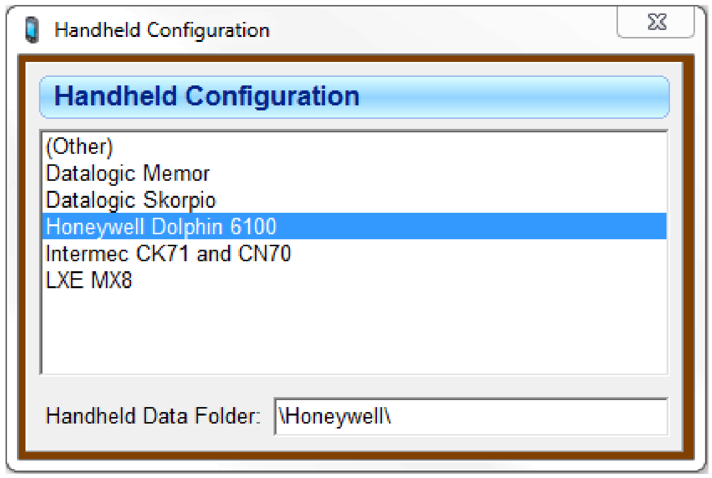
MS Access does not automatically remove data that is deleted by the system. Compacting the database will remove data that has been deleted. This will reduce the size of the database file and improve performance.

Access to the Backup/Compact screen is only available when the ADMIN login is used. After logging in, select Backup/Compact Database on the File menu. Then select the Compact Database button.

The system will backup, compact, and repair the database. When complete, the Compact Database screen will disappear.

To leave the process, select the ☒ in the upper right corner of the screen.

Handheld Configuration

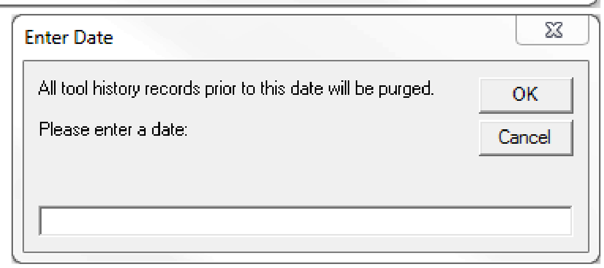


The Handheld Configuration screen is used to select the batch handheld scanner being used. This version of ATS currently supports Pocket PC scanners.

To view the Handheld Configuration screen, click the File menu item and select Handheld Configuration.

Pocket PC devices require Microsoft ActiveSync (Windows XP) or Windows Mobile Device Center (Windows Vista or Windows 7) to communicate with ATS.

Purge History



If you would like to purge all history before a certain date, you can enter a specific date and then click OK. **WARNING!!** Be very careful with this feature, when you click OK, all tool history records will be purged for good.

Imports

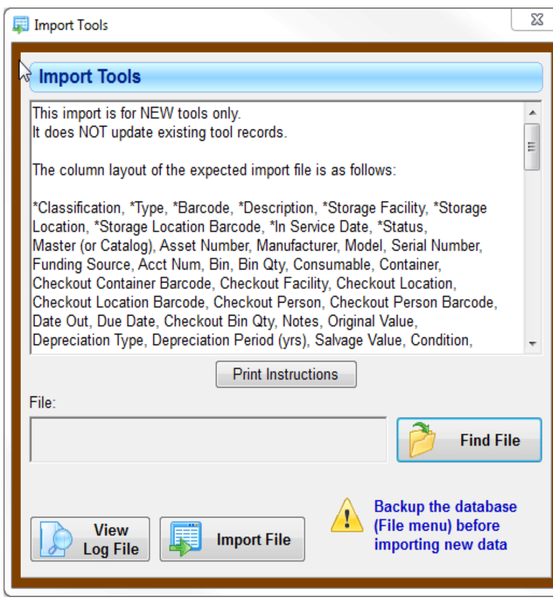
Several Import Options are now available. Each import has specific instructions included on the import screen that delineates data formatting requirements along with any special instructions you may need. Imports are available for the following:

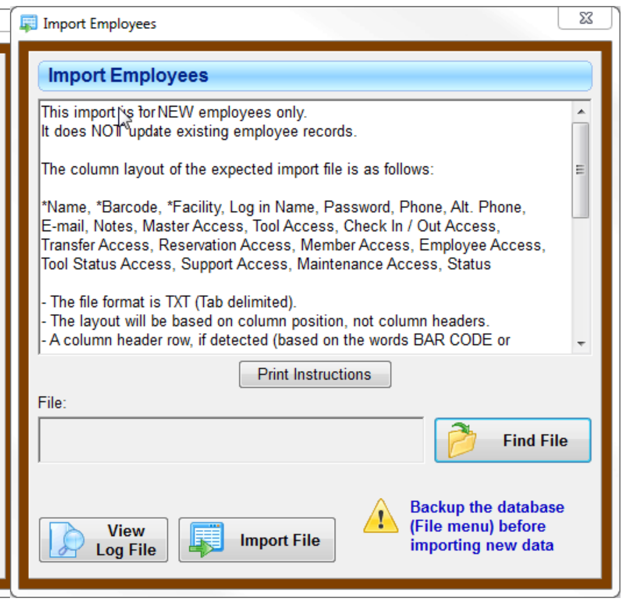
- Import Accounts: Allows the import of account data into the Account Administration table.
- Import Employees: Allows the import of employee data into the Employee Administration table. The import even allows for the granting of specific access rights to the various functions in TTS.
- Import Funding Sources: Allows the import of funding source data into the Funding Source Administration table.
- Import from ToolWatch®: ToolWatch® is a product of ToolWatch Corporation and licensed and copyrighted specifically for their own purpose. As with any software product, you the user have specific rights to your own data. We at GigaTrak have been requested to accept data from ToolWatch® so an import for specific data is made available. You must be careful when

moving data from one system to another and make sure that all procedures are followed to avoid data problems. Contact GigaTrak for additional information.

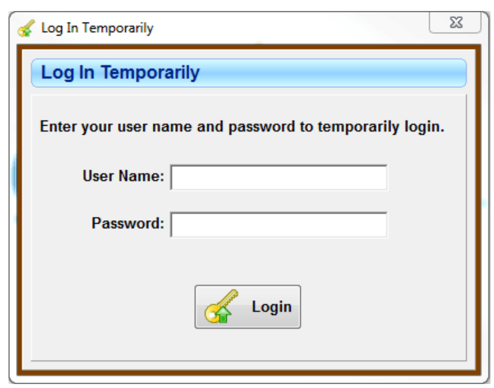
- Import Locations: Allows the import of location data into the Location Administration function. Careful – Locations are Facility Specific so the data must be accurate.
- Import Master/Catalog Items: Allows the import of master/catalog data from outside sources. Additional data may be desired but requires user editing after the import is completed.
- Import Tools: If you have spent years managing your inventory in an Excel formatted file, this can help you save time by importing your existing tool inventory quickly and safely. It is critical to ensure that the data is accurate and formatted properly to avoid bad data upon import!

Typical examples of imports are shown at the right.





Log In Temporarily



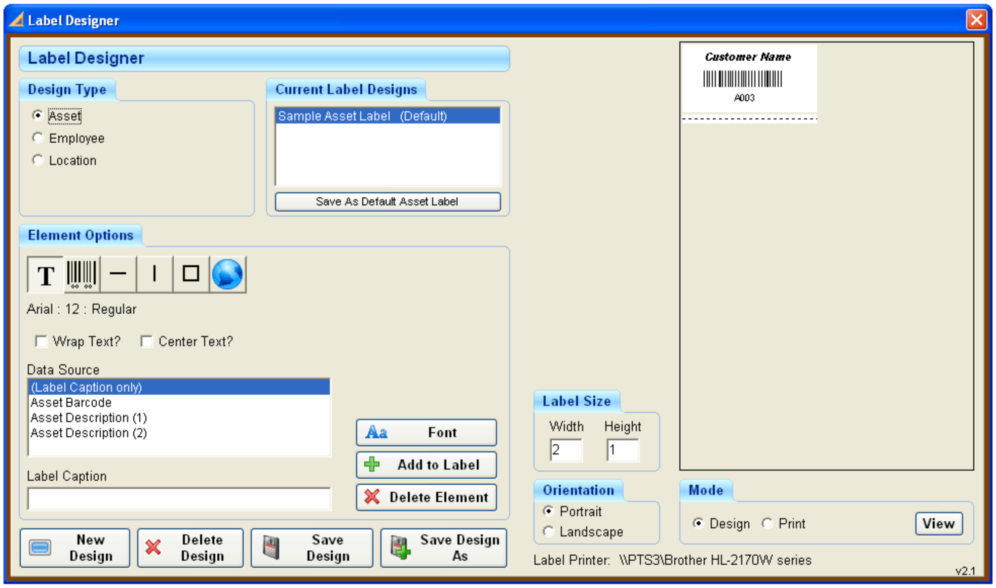
Log in temporarily is a function that is used for a supervisor to log in to perform some function that the current user may not perform without the current user having to exit the program. Select Log In Temporarily under the file menu. The screen at right will appear. Enter your user name and password, and then select the Log In button.

Print Screen

Print screen is used to print the current screen that is displayed in the ATS system to the default printer set for the computer. It will not print the main screen. To print the current screen, select Print Screen under the File menu.

Label Designer

The Label Designer process is used to design labels for the various processes in the system that prints barcode labels.



The processes that will print labels are:

- Asset
- Employee
- Location

These processes can be selected in the Design Type section of the form, which is located in the upper left corner.

To design a label, first select the design type.

The Data Source List will contain the possible fields that may be included in the label. The list on the example contains the possible data sources for an asset label.

The Current Label Design list will contain any labels that have already been created for the design type. The list currently contains a sample asset label. When one of these labels is selected, the box on the right will display the label design, as indicated above for the sample asset label.

To create a new label, select the Design type and then select New Design button. Set the label size (Width and Height in inches). Set the label orientation (Portrait or Landscape). For Portrait, the height is vertical on the screen. For Landscape the Height is Horizontal on the screen.

There are 6 different elements that may be placed on the label. They are from left to right: text, barcode, horizontal line, vertical line, box, and a graphic.

Label Quick Start

To put the asset barcode on your label as a barcode:

1) In "Element Options" select the barcode button.
2) In the "Data Source" list box, select "Asset Barcode".
3) Click the "Add to Label" button to put it in your label design.
4) Drag the element to the desired position.

To put the asset barcode on your label as a text field:

1) In "Element Options" select the "T" button.
2) In the "Data Source" list box, select "Asset Barcode".
3) Set the desired Font options.
4) Click the "Add to Label" button to put it in your label design.
5) Drag the element to the desired position.

Adding a Text Element
Select the Text (T) button in the Element Options panel. Select (Label Caption only) in the Data Source box, and type a label caption in the Label Caption textbox. You can select Wrap Text or Center. To set the font style and size, click the Font button. Click the Add to Label button. The text element will appear in the upper left corner of the label design. Drag it to the desired position on the label.

To edit the text caption or font after a text element has been placed in a label design, right click on the element and choose the option desired.

Adding a Database Field Text Element
In the Data Source box, select the desired database field. You can select Wrap Text or Center. To set the font style and size, click the Font button. Click the Add to Label button. A sample of the data will appear in the upper left corner of the label design. Drag it to the desired position on the label. When the label is printed, the actual data for that field will be printed on the label.

To edit the text caption or font after a database field text element has been placed in a label design, right click on the element and choose the option desired.

Adding a Barcode Element
Select the Barcode button in the Element Options panel. Select (Label Caption only) in the Data Source box, and type a label caption in the Label Caption textbox. You can select Center. Select the barcode font and size desired. Click the Add to Label button. The text will be added to the label in the barcode font. Drag it to the desired position on the label.

If a database field is needed as a barcode, select the field from the Data Source box, and add it to the label. When the label is printed, the actual data for that field will be printed on the label as a barcode.

Adding a Horizontal Line Element
Select the Horizontal Line button in the Element Options panel. Click the Add to Label button. A horizontal line segment will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label. To change the size of the line, place the mouse cursor over the right end of the line. When the cursor changes to a double arrow, click and drag the endpoint to the desired length.

Adding a Vertical Line Element
Select the Vertical Line button in the Element Options panel. Click the Add to Label button. A vertical line segment will be added to the label design in the upper left-hand corner of the label. Drag it to the desired position on the label. To change the size of the line, place the mouse cursor over the bottom of the line. When the cursor changes to a double arrow, click and drag the endpoint to the desired length.

Adding a Box Element
Select the Box button in the Element Options panel. Click the Add to Label button. A box will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label. To change the size of the box, place the mouse cursor over the lower right-hand corner of the box. When the cursor changes to a double arrow, click and drag the endpoint to the desired size.

Adding a Graphic Element
Select the Graphic button in the Element Options panel. Click the Find Graphic File button to find a file on your computer to place on the label. File types supported are bmp, gif, jpg, wmf, and ico. Click the Add to Label button. The graphic will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label.

Graphic elements are resizable. **Save the label design before attempting to resize a graphic element.** Right click on the graphic in the label and select Resize Graphic. A Resize Graphic box will appear above the Label Size box. Enter the desired Height and Width (in inches) and click the OK button. It may be possible to enter a size that causes the graphic to disappear from the label design. If this happens, select a different label design. When prompted to save changes, respond NO to the prompt. Then go back to the label design and try again.

Deleting a Label Element
Select the element to be deleted from the label design. Click the Delete Element button, or press the Delete key on the keyboard. Elements can also be deleted by right-clicking on the element and selecting Delete from the popup menu.

Deleting a Label Design
To delete an entire label design, select the design from the Current Label Designs list. Click the Delete Design button at the bottom of the screen.

Save an Existing Design as a New Design
Time may be saved by copying an existing label design and modifying it. Select the design from the Current Label Designs list, and click the Save Design As button at the bottom of the screen. Enter a new design name and click the OK button. Design names must be unique.

Viewing/Printing a Label
The work space on the right-hand side of the screen provides a feel for how your label will print. If you need to view exactly how your label will print, click on the View button with the Mode setting set to Design. An exact replica of the label will appear. To print the label on your label printer, change the Mode setting to Print, enter the number of labels you want to print and click the Print button.

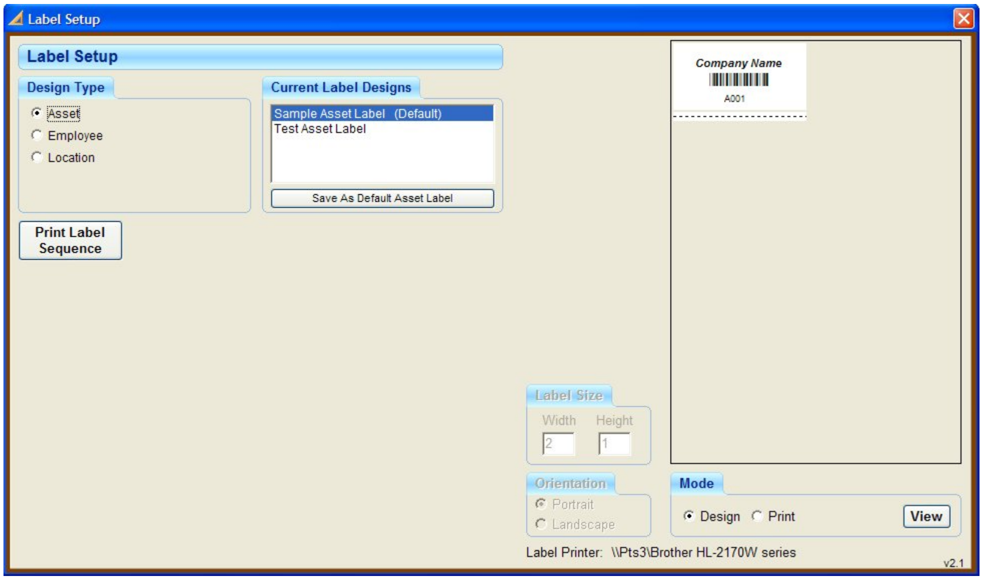
To save a label design as default for a specified process, select the Design Type (process), and select the label design from the Current Label Designs list. Then select the Save as Default button.

When a label is set as the default label, the word "Default" will appear after the label design.

To leave the process, select the ☒ in the upper right corner of the form.

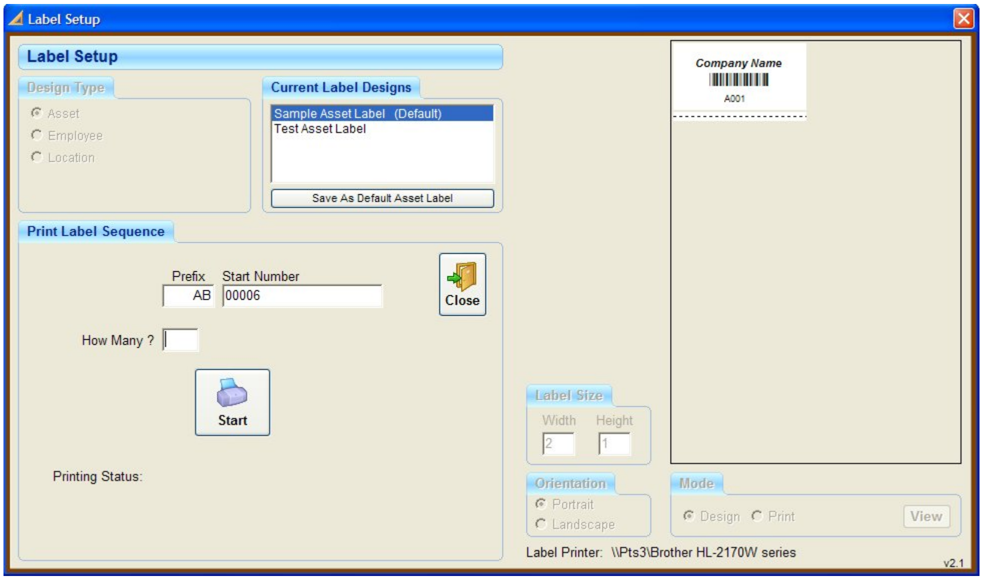
Label Setup

The Label Setup screen allows the printing of barcode labels in sequence. This feature is only available for the Asset Design Type. This allows printing of asset barcode labels that can then be attached to assets, and entered on the Asset Information screen.



Any Asset Label design can be chosen, it does not have to be the "Default" design. The label design must contain the barcode design element or it will not print. Note that if the label design contains an asset description, the description will be blank. They have not yet been assigned to an asset.

On the Label Setup screen, select the Asset Design Type, then select the Print Label Sequence button. The screen below will be displayed.



A three (3) character prefix can be entered if desired. The Start Number will initially start at 00000001 but can be changed to any number desired (up to 8 characters). Enter the number of labels to print in the How Many box and select the Start button.

The system will check the barcodes already assigned to assets in the database to be sure that the barcode to be printed is unique. If it is unique, the label will print. If it is not unique, the number will be skipped, and the next number in the sequence will be checked. If the number of characters in the Start Number is incremented beyond 8 characters, a message will be displayed and printing will stop.

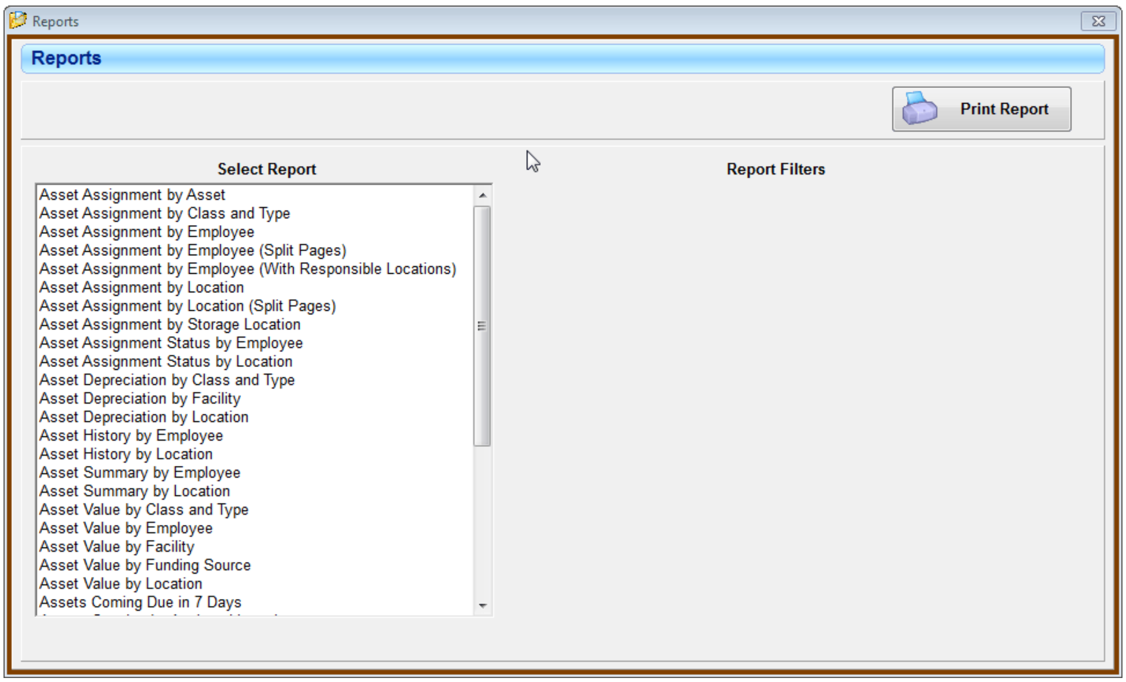
After printing starts, a Cancel button will appear. Selecting the cancel button will stop the printing process. Pressing the Esc key on the keyboard will also stop printing.

The prefix and the last barcode number printed will be saved in the database. These values will then appear the next time the Print Label Sequence function is used. The Start Number will automatically be increased to the next value.

To exit the Print Label Sequence function, select the Close button.

Reports

Selecting the Reports button on the main screen displays the screen below.



If custom reports are ordered, they will also be listed on this screen.

Select the report of interest and the report filters will appear on the right portion of the screen.

Some reports have an Ignore Due Date greater than a specified date. This is useful if some assets are checked out to a location or employee over a long period of time, and you do not want these assets to appear on monthly reports.

After the desired report filters are selected, select the Print Report button. A print preview screen will be displayed from which the report may be printed.

Support

GigaTrak provides 90-days of telephone support for ATS from the date of purchase. GigaTrak will advise on installation issues but the customer is responsible for network and SQL Server installation. Our hours are 8am to 5pm central time Monday through Friday. During this time you are entitled to any updates or new releases issued by GigaTrak. By purchasing an extended support one, two or three year agreement, these services are extended. Onsite support is available at additional cost. Please call 262-657-5500 with any questions.

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