



Tool Tracking System User Manual

Version 1.24

Copyright © 2014 GigaTrak®
All Rights Reserved



1250 Touhy Avenue
Elk Grove Village, IL 60007
877-204-9237



Table of Contents

Welcome	1
TTS Hardware Options	1
Zebra Printer Driver Configuration	3
Zebra TLP2824 Plus Printer Driver Configuration	4
Windows CE/Mobile Handheld Installation (Batch Only)	6
Quick Start Overview	7
Logging in to TTS	9
Registration	9
Setup Options	9
Tool Setup (F1)	9
Application Settings (F2)	10
Member Settings (F3)	12
Printer Assignment	13
Employee Administration	14
Employee Information	15
Employee Access Levels	15
Import Employees	16
Account Administration	16
Import Accounts	16
Tool Support Administration	17
Classification (F1)	17
Type (F2)	18
User Defined Fields (F3)	19
Maintenance (F4)	20
Condition Administration	21
Facility Administration	22
Funding Source Administration	23
Import Funding Source	23
Location Administration	23
Export List To File	25
Change Responsible Individual	25
Print Barcode List	25
Print Location Label	25
Import Locations	25
Maintenance / Repair Provider	26
Tool Management	26
Tool Master (Commonly Referred to as the Catalog)	26
Find Master (F1)	27
Search Field	27
Add To List	27
Print List	27
Print Barcode List	27
Export List To File	27
Master Information (F2)	28
Import Master Items	28
Tools Screen	29
Find Tools (F1)	29
Show Thumbnail Images	30
Search Field	30
Add To List	30
Change Status	31
Change Storage Location	31

Print List	31
Print Barcode List	31
Print Tool Label	31
Export List To File	32
Tool Information (F2)	32
Primary Data Sub-tab	33
Purchase / Warr. Sub-tab	33
Images & Docs Sub-tab	33
User Defined Data Sub-tab	33
Miles / Hours Sub-tab	33
Binned and Consumable Items	34
Import Tools	35
Import Miles and Hours	35
Tool History (F3)	35
Tool Maintenance (F4)	36
Check In/Check Out Tools	36
Check Out (F1)	37
Check In By Tool (F2)	38
Check In By Container / Person / Location (F3)	39
Transfer Tools	40
Transfer Out (F1)	40
Cancel Transfer (F2)	40
Transfer In (F3)	41
Reserving Tools	41
Find Reservations (F1)	41
Reservation Admin (F2)	42
Download Handheld	43
Commit Download Data to the Database	44
Change Password	44
Backup / Compact Database	45
Handheld Configuration	45
Label Designer	46
Label Quick Start	47
Log In Temporarily	48
Print Screen	49
Import Options	49
Reports50	
Check For Update	50
TTS Mobile Handheld Application	51
Batch vs. Wireless Handhelds	51
Communication With Host PC	51
Microsoft Active Sync Installation (For Windows XP)	51
Windows Mobile Device Center Installation (For Windows Vista or Windows 7)	51
Install GigaTrak Handheld Application	51
Sync With Host PC	52
Sync Manually via SD Card	52
Sync Manually with Terminal Services / Citrix	52
TTS Handheld Application Functions	54
Handheld Application Login	54
Wireless Application Login	54
Wireless Application Admin	54
Check Out	55
Check In	55
Audit	56
Count Bin	56
Identify	57

Add New Tools	57
Assign Barcode (Batch application only)	58
Maintenance	58
Download Data Back to the Host Application	59
Support60	
Software License Agreement	61
Limitations on Warranty and Liability	61
Appendix A Honeywell 6100 Handheld Information	63
Appendix B LXE Handheld Information	66
Appendix C Memor Handheld Information	69
Appendix D Skorpio X3 Handheld Information	72

Welcome

Thank you for purchasing our Tool Tracking System (TTS). It is founded on the principles of our tool tracking experience that started in 1992, yet incorporates many of the more elegant and easy-to-use features found in latest systems. This User's Manual is designed to help you get going quickly and be ready to use our TTS 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.

TTS Hardware Options

Several hardware options are available from GigaTrak that can work with TTS. Even though the more basic units shown offer the same functionality as advanced systems, there are several reasons you should discuss your needs with us before proceeding. Enhanced speed, performance durability and environment are qualities to consider before choosing a handheld terminal or printer.



Batch Handheld PDAs (Optional)

The Windows Mobile/CE handheld functions as the data collection device for the check-out of items. These devices connect to the USB port of your computer and use Microsoft Active Sync (for Windows XP) or Windows Mobile Device Center (for Windows Vista and higher) to communicate (not included). Application files are included for software loading. Mobile licensing is provided with each unit purchased from GigaTrak.

Wireless Handheld PDAs (Optional)

They look the same as a batch handheld computer, but add in WiFi using 802.11 technologies. Many different manufacturer systems with varying options are available. GigaTrak can assist you in selecting alternate hardware options based on screen size, processor performance, durability, keypad design, and more. Contact GigaTrak for

more information!

Zebra Label Printer (Optional)

The Zebra printer uses a standard USB, Serial, or Parallel printer cable. Connect the printer to your PC and power the printer. You must then install the printer driver as though it is a standard Windows printer. A print driver CD is included and should assist you with installation. Updated drivers may also be downloaded from the manufacturer's WEB site.



NOTE: The "Printing Preferences" for the Zebra print driver has several configuration options that must be set. Most importantly, you MUST setup the default "Print Size" to match the label size being used. Also, ensure the setting for "Media Type" is set to Thermal Transfer if you are using a ribbon. Your label design format in TTS should then match the size of label used. See the Printer Driver Configuration section that follows.

Other printer selections are available at additional cost.

Labels and Ribbons (Optional)



There are dozens of labeling options available. Preprinted labels are commonly used to provide a more durable option for labeling tools and equipment. When printing your own, labels are available in varying sizes, material types (paper, poly, etc.), and adhesives. Ribbon types are specific to the label media being used. Please contact GigaTrak to reorder labeling materials and ribbon.

PC Corded Barcode Scanner (Optional)



A corded barcode scanner can be used to scan check-out and check-in data directly into TTS. Two connection options are available. The first connects the scanner via your USB port and should auto-configure. The second connects to your PC's keyboard and requires no PC drivers.

For special needs and support, contact GigaTrak within the warranty period or as a part of your Extended Support Agreement.

UPS Power Supplies and Equipment Protection



Through our partnerships, GigaTrak has the ability to offer an extended line of products to protect your computer equipment and ensure years of operation. Look to GigaTrak for your power condition and protection needs.

There are other hardware options that may be suited for your application. This includes RFID systems with specialty tags and readers. Contact GigaTrak for more information.

Zebra Printer Driver Configuration

Each Zebra printer provided with many of our software systems offers excellent performance at a reasonable price. For documentation, Zebra includes both quick installation and a full user's manual on the CD provided with the printer. The challenge is that print driver setup information is more difficult to find and first-time users need to understand the unique issues to configure the driver properly.

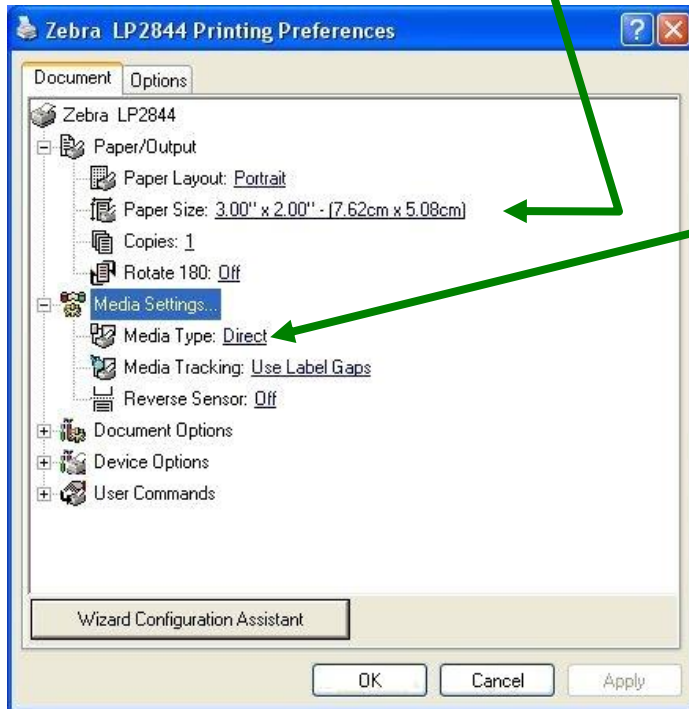
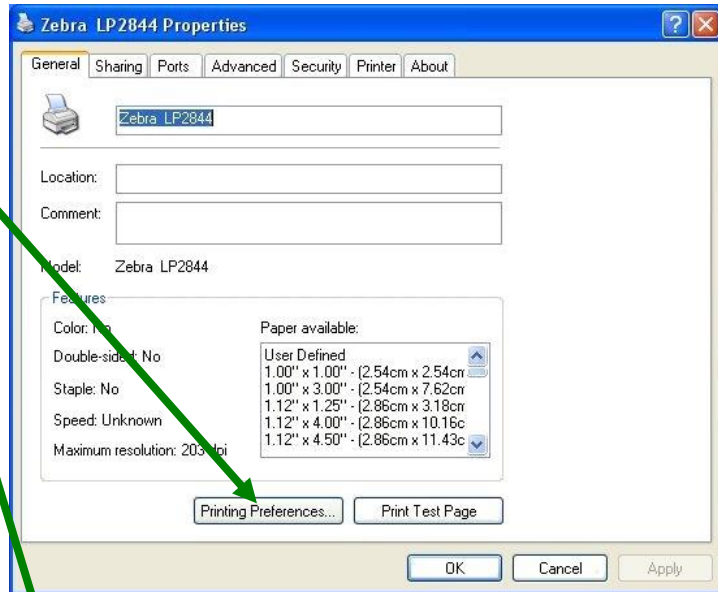
Configuring the Zebra Print Driver

Zebra's print driver is standard across most of their desktop and tabletop products. Familiarize yourself with the driver by opening the Printers and Faxes option on the Start-Settings menu and highlighting the Zebra Print Driver.

By right-clicking the driver, you can then select Properties and the dialog box will appear as shown. To proceed, select the Printing Preferences option button shown on the General tab of the box.

Make sure to change the Paper Size to the size to match that of the label inserted into the Zebra Printer.

NOTE: If the label size you have is NOT listed, you must manually create a USER DEFINED label that matches the exact size being used in the printer!!!



Also, set the Media Type option to either Direct (direct thermal labels with no ribbon) or Thermal Transfer (standard labels that require a ribbon). LP desktop printers are Direct ONLY. TLP printers can do either mode.

Be careful! We recommend that you do not change any other settings! Read the Zebra manual for any questions. Click the "Apply" button to save your setting changes and exit.

For other printer brands and models, GigaTrak will provide supplementary information with the systems provided.

Zebra TLP2824 Plus Printer Driver Configuration

Overview

Each Zebra printer provided with many our software systems offers excellent performance at a reasonable price. For documentation, Zebra includes both quick installation and a full user's manual on the CD provided with the printer. The challenge is that print driver setup information is more difficult to find and first-time users need to understand the unique issues to configure the driver properly.

Configuring the Zebra Print Driver

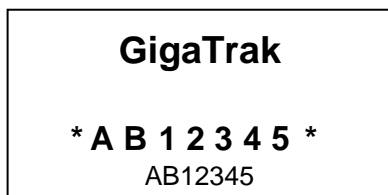
Zebra's Plus Series print driver is new in 2010 and different than prior drivers. Familiarize yourself with the driver by opening the *Printers and Faxes* option on the *Start-Settings* menu and highlighting the "ZDesigner TLP 2824 Plus" print driver.

Options Tab

By right-clicking the driver, you can then select the *Printing Preferences...* option. The screen at the right is displayed. The first tab shown is the "Options" tab.

Settings

The settings section should be set with the default "No. Of Copies" = 1. Speed and Darkness should be adjusted to improve the print quality of the barcode. A slower speed typically improves the overall quality. Darkness should be adjusted up or down to ensure the print quality is the highest. Too low of setting may produced a faded looking barcode while too high will overheat and cause the barcode lines to bleed over into one another. A good quality barcode should look like the one shown below.



Paper Format

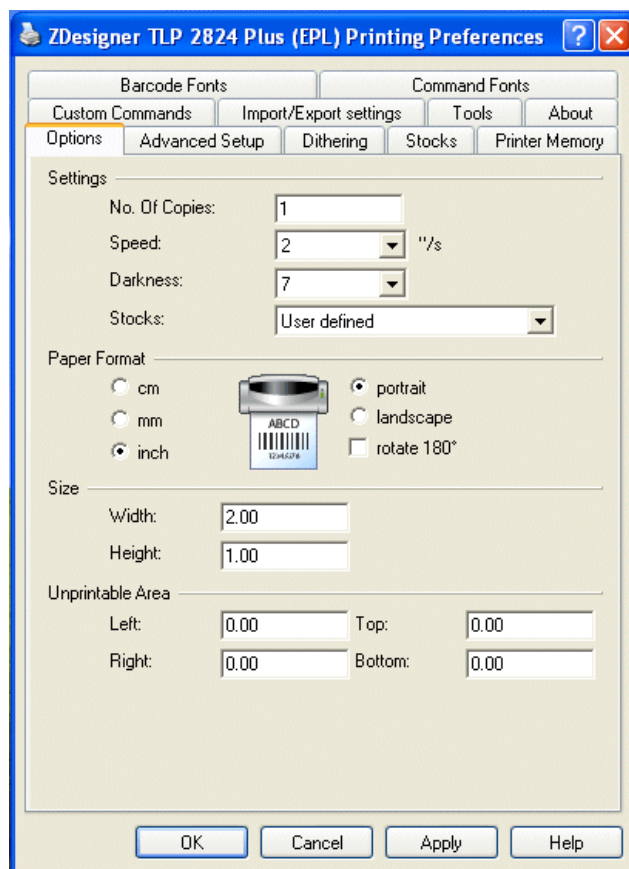
Generally, use the default settings of "inch" and "portrait".

Size

It is crucial to set the Size to exactly match the size of label inserted into the printer. The example shown uses the default GigaTrak label size of 2" x 1" as shown in the example above. Remember to change the label size any time you change the roll of labels to a new size of label.

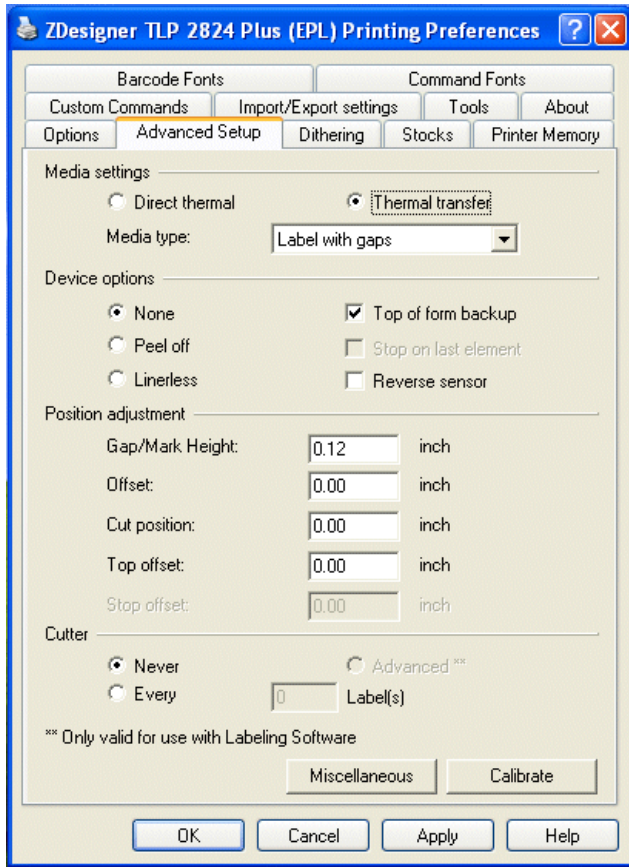
Unprintable Area

Leave the default settings as they are. All should be set to 0.00 unless a specially formatted label is used.



Advanced Setup Tab

By selecting the Advanced Setup tab, several other settings are available.



Media Settings

This option is dependent on the type of label being used. Select the “Direct Thermal” option if the label is specially coated and prints directly without the used of a ribbon. Use “Thermal Transfer” with all labels that require a ribbon when printing. Most label types include rolls with labels separated by a “gap”. Labels with gaps are usually perforated in between each label for easy tear-off. Some rolls of labels are continuous or have a black mark on the back side of the label liner indicating the start of each label. Make sure to set the “Media Types” accordingly. NOTE: LP desktop printers are Direct ONLY. TLP printers can do either mode.

Device Options

Unless your printer and labels have the need for special settings, leave this alone. Refer to the Zebra Users Guide for further information.

Position Adjustment

Unless you are having printing alignment issues, leave these settings alone. Refer to the Zebra Users Guide for further information.

Cutter

Selected models of this Zebra printer are available with an installed cutter. GigaTrak does

not use a cutter as a standard printer option. “Never” is typically the appropriate setting.

Calibrate

The “Calibrate” function is critical when first setting up a printer with a new type of barcode label. Calibrate adjusts the sensor for the gaps between labels to properly sense when the next label is aligned. Should you get more than one label for each print request, it is best to first run calibrate before proceeding further. If you change label types, we recommend that you re-calibrate each time.

Conclusion

Be careful! The printer driver clearly offers many more settings and features. We recommend that you do not change any other settings! Read the Zebra manual for any questions. Click the “Apply” button to save your setting changes and exit.

Windows CE/Mobile Handheld Installation (Batch Only)

Overview

The latest in handheld computer technology adds new power and flexibility in collecting data. Microsoft Windows Mobile and CE platforms are now the industry standard and offer a more standardized platform for all users. “Batch” handheld computers store data in memory and must be docked to a PC workstation to download the data on a periodic basis. For Windows XP, ActiveSync provides the communications between your Windows PC workstation and the handheld computer. Those with Vista and Windows 7 PCs must use Microsoft’s Mobile Device Center. Each of these applications is free from Microsoft’s website.

NOTE: Use alternate instructions for other brands and models of the handheld computer terminal.

Microsoft ActiveSync Installation (For Windows XP)

As noted, Microsoft ActiveSync provides the communications between your Windows PC workstation and the handheld computer. Follow the instructions below to perform the installation BEFORE you plug the USB cable into the handheld.

Locate a copy of the latest version of ActiveSync for your computer system. The correct version is available from Microsoft’s WEB site. Version 4.5 is the latest from Microsoft as of this printing.

Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install. Leave ActiveSync running to install and connect your handheld computer.

NOTE: Some users may connect multiple handheld computers to a single PC. If this is the case, it is best to setup your PC to recognize each handheld as a “Guest”. This avoids having ActiveSync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided “GuestOnly.reg” file. It will instantly update your system for future connections.

Microsoft Windows Mobile Device Center Installation (For Windows Vista or Windows 7)

Locate a copy of the latest version of Windows Mobile Device Center for your computer system. The correct version is available from Microsoft’s WEB site.

Look for the installation file (i.e. drvupdate-x86.exe or drvupdate-amd64.exe) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.

Connecting and Installing your Handheld Computer

PLEASE, refer to the installation procedures included with your handheld BEFORE proceeding further. Below, we will provide general instructions for installation of the handheld – our standard handheld computer provided with our system bundles. Other handheld options are available and will likely follow similar steps for installation.

BEFORE connecting the handheld computer to a host USB port for the first time, you may need to install the USB driver provided with the handheld computer on your PC. This will likely be include on a CD-ROM or downloaded from the WEB. Complete the driver installation as instructed during the installation procedure. (NOTE: Some handheld models may not require a driver to be loaded. Refer to the installation instructions.)

Connect the USB cable to your PC and the handheld or docking station (if provided). Windows will locate the hardware and complete the installation. Once the connection is complete, you should be able to see the handheld computer on your PC via ActiveSync or Mobile Device Center.



Quick Start Overview

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

1. Tool Classifications, Types, User Defined Fields, and Maintenance

This function allows you to create classifications, and types within each classification. Classifications (i.e. Power Hand Tools) and (sub-) Types (i.e. Drills, Saws, etc.) are used to categorize tools. On the menu bar select Support → Tool Support Administration. You can rename the Class and Types designators in the System Setup function if desired. You can also add User Defined fields and Maintenance tasks to a specific Type of tool (not available in the Basic edition). See Tool Support Administration in this 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. The Accounts screen allows you to tie each Tool to an account number for added filtering. You can also rename the Funding Source and Account in the System Setup function, if desired.

4. Manufacturers

The Manufacturer is a standalone field that can be setup by you to help filter on equipment by manufacturer.

5. Facilities

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

6. Locations

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

7. Employees

This function allows you to create users of TTS. A user may be an individual that will be using the TTS system, or a person to which tools may be checked out. You can also set TTS Access Rights for each user. On the menu bar select File→ Employee Administration. See Employee Administration in this Manual for a detailed explanation. NOTE: The user must be logged in as "Admin" to access this option.

8. Members (Contractor Edition Only)

This function allows you to create Members other than employees. A member is an individual to which tools may be checked out. You can set Member Categories in the Setup Options screen, and then add new members under the Members button.

9. 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 this Manual for a detailed explanation.

10. Label Design

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

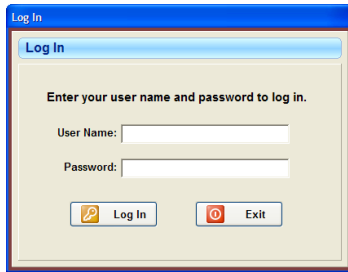
11. Tools and Master

The tool administration screen allows for the creation and maintenance of tools which are tracked by this system. On the main button bar select the Tools button. The Master function is used to enter in common tools in a master data set that can be selected when adding tools – saving time and effort. See Tool Management in this Manual for a detailed explanation.

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

Backup your database daily!

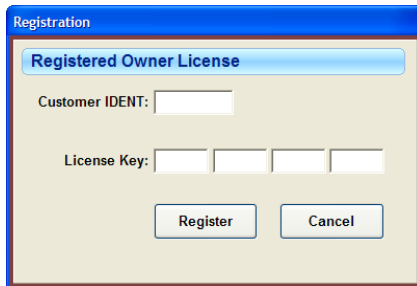
Logging in to TTS



When the program starts, the screen at left is displayed. The User Name and Password text boxes are blank.

If this is the first entry into the program, there is only one user, Admin User. You will have to first log in using the Admin User's data: the user Name is ADMIN plus your administrative password. 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. 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.

The tabs on this screen can be accessed by pressing the function keys on your keyboard.

Tool Setup (F1)

The Tool Setup tab is used to change the name of multiple parameters in the system and establish a default location for reference files. Options vary by version of TTS.

Classification, Type, Facility, Location, and Funding Source are parameters tied to tools. These may be of use to organize tools into groups.

Model Number, Serial Number, Account, Condition, Master, and Miscellaneous can be renamed to suit your needs.

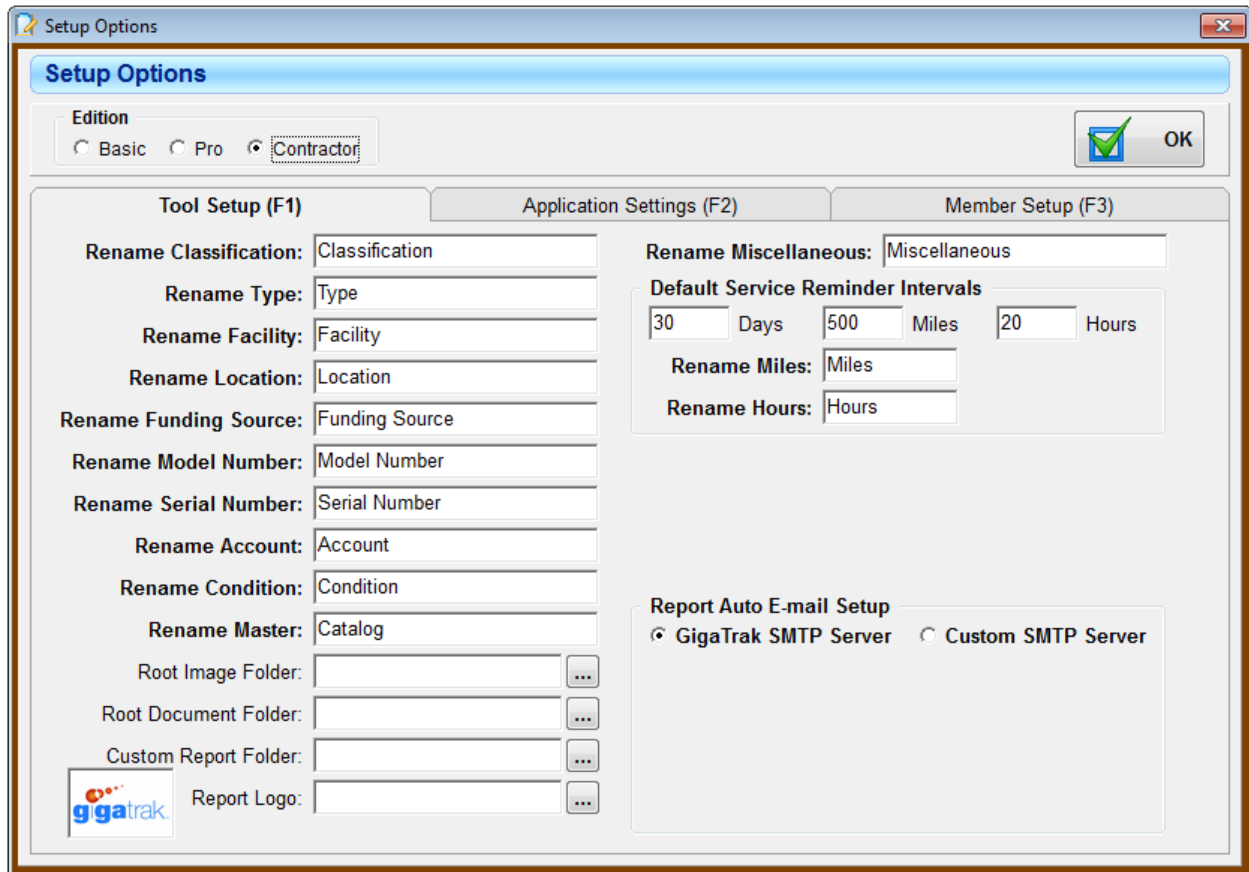
To change these values, type in the value desired, and then select the OK button.

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

The Custom Report Folder is the location for custom report files. 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 reports. You can select a .bmp, .gif, or .jpg file. To clear a logo after it is selected, click the "Select" button and click Cancel on the selection screen.

Default Service Reminder Intervals are used for tool maintenance (not available in Basic edition). You can set the number of Days, Miles, and Hours. You can also rename Miles and Hours to suit your needs.



To save the changes on all 3 tabs of 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 screen without changing any values, select the in the upper right corner of the screen.

Application Settings (F2)

Application Settings control various functions in the tool tracking application.

If Show Depreciation is checked, then the depreciation information will be visible on the Tool information screen. The Tool Depreciation Report will also be available on the Reports screen. If the checkbox is not checked, the depreciation information will not be visible and the depreciation report will not be shown.

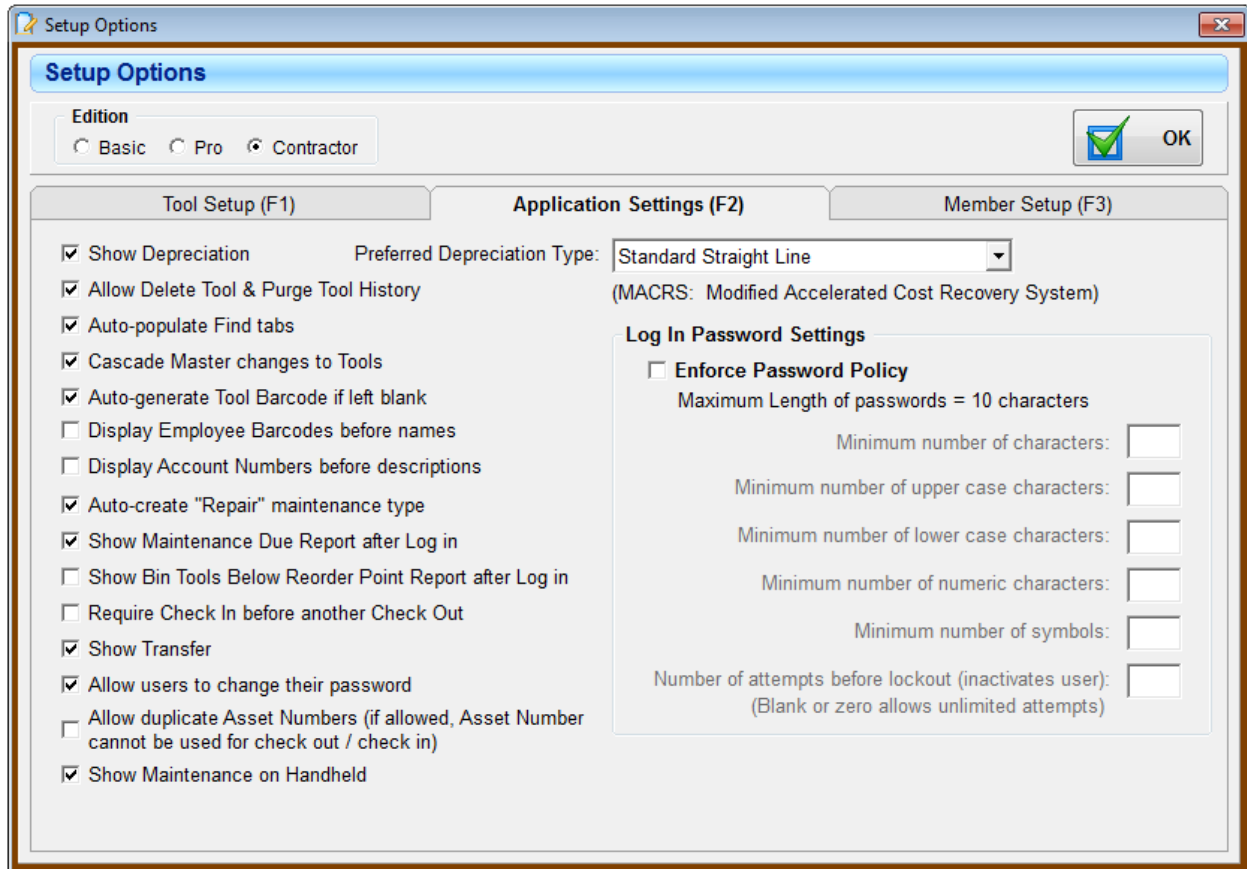
The checkbox cannot be checked until you accept the popup Depreciation Disclaimer, shown below.

Depreciation Disclaimer:

The Depreciation Function, including access to formulas used for the computations provided herein, is provided by GigaTrak solely for your convenience and for illustration purposes only. GigaTrak is not licensed or qualified to give, and is not providing to you, any legal, tax, financial reporting or accounting advice. GigaTrak does not guaranty the accuracy of the computations. Furthermore, GigaTrak can not be aware of any customer’s particular circumstances and GigaTrak does not purport to keep up to date with any tax, financial reporting or accounting standards or requirements. The information contained herein is not guaranteed to be correct, complete or up to date. Accordingly, you should consult with your own legal, tax, financial reporting and accounting advisors. GigaTrak is not responsible for any loss, injury, claim, liability or damage related to your use of this Depreciation Function or the output hereof and by your use

of this Depreciation Function you waive and release GigaTrak from any such loss, injury, claim, liability or damage. You use this Depreciation Function at your own risk and the correctness and usability of the output hereof remains your sole responsibility.

GigaTrak is not licensed or qualified to give, and is not providing to you, any legal, tax, financial reporting or accounting advice.



After accepting the disclaimer, the Preferred Depreciation Type selection will be enabled. This will be the default selection when adding new tools on the Tool Information screen.

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

The Auto-populate Find Tabs will automatically display information when a Find screen is opened. If not checked, you must “Extract” data first to view a listing.

Cascade Master changes to Tools gives you the option to push any changes from the Master Catalog function to each respective Tool assigned to the Master Number. **CAUTION:** Changes to the Master Catalog may RESET User-Defined data to the values set within the Master Catalog.

The Auto-generate Tool Barcode option creates a new barcode ID when adding new tools IF NO BARCODE is assigned.

The Display Employee Barcodes before names applies to several report selection filters. If you view employees primarily by their names, leave this unchecked. If you preferred tracking employees by the Barcode ID, then check the checkbox.

The same applies to the Display Account Numbers before descriptions. Select how you prefer to view your report filters here.

The Auto-create "Repair" maintenance type will insert a repair maintenance item anytime a new Classification and Type of equipment is created. This is not available in the Basic edition.

The Show Maintenance Due Report after Log In automatically displays the report of any upcoming maintenance items immediately following log in. This is not available in the Basic edition.

The Show Bin Tools Below Reorder Point Report 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.

TTS allows you to also enforce password standards including minimum number of characters, upper case, numeric characters, and symbols.

To save the changes on all 3 tabs of 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 screen without changing any values, select the in the upper right corner of the screen.

Member Settings (F3)

This option is only available in the Contractor edition.

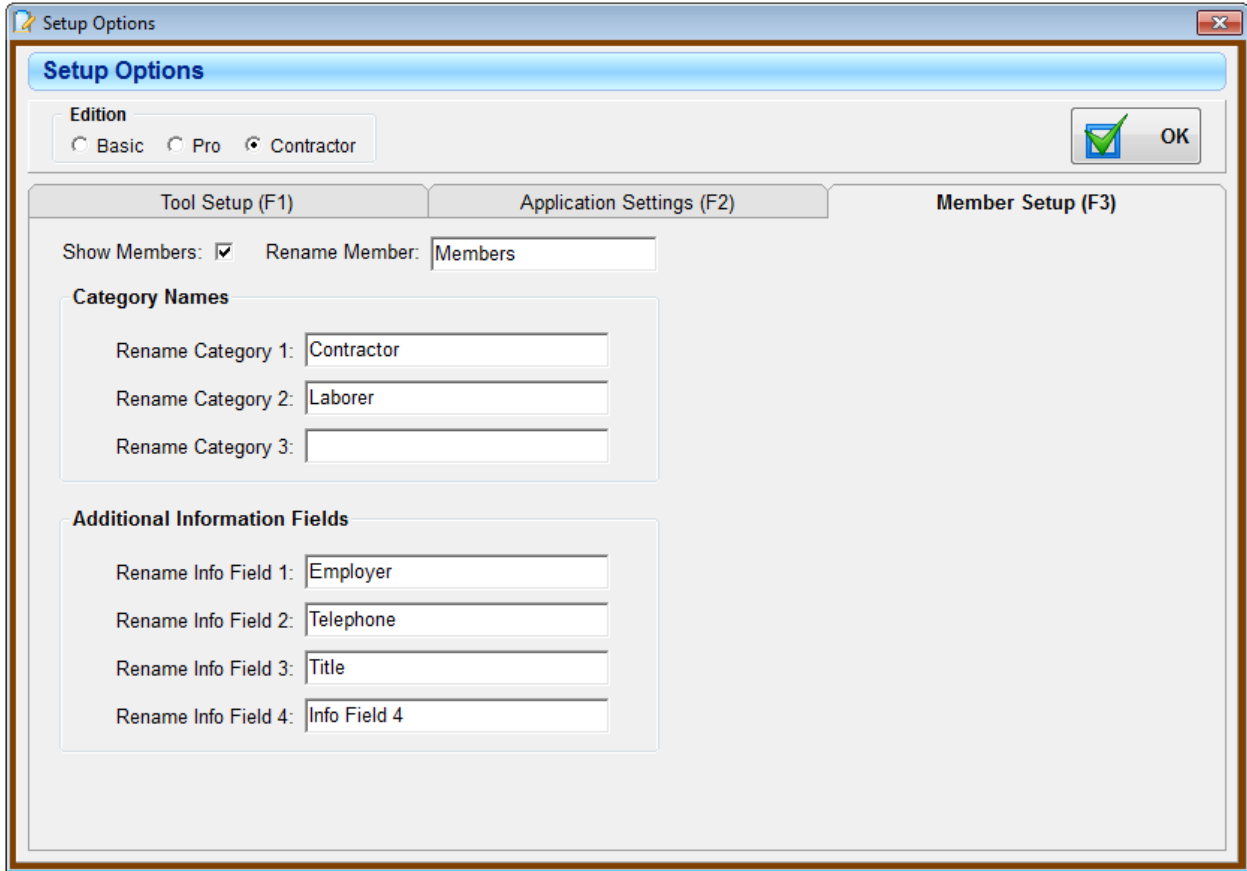
Members could be contractors that you would check out tools to, or it could be used for jobs that you check out tools to.

The Show Members checkbox will display the Member button on the main toolbar if checked. If unchecked, the Member button will not be displayed.

You can rename Member to whatever is appropriate for your company, such as "Contractor".

There are 3 categories available to be used as needed. Categories are searchable fields on the Member screen.

There are 4 Additional Information fields that can be used as needed. These are also searchable fields on the Member screen.



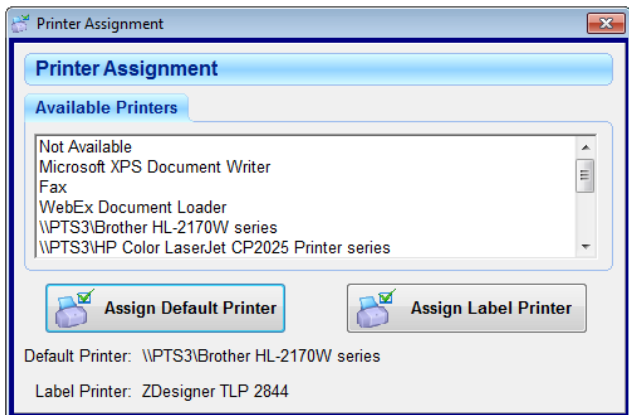
To save the changes on all 3 tabs of the screen, select the OK button. A confirmation message will appear, listing the items that you altered. Selecting “Yes” will save the changes and close the screen. Selecting “No” will reset the changes back to the original values.

To leave the screen 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.

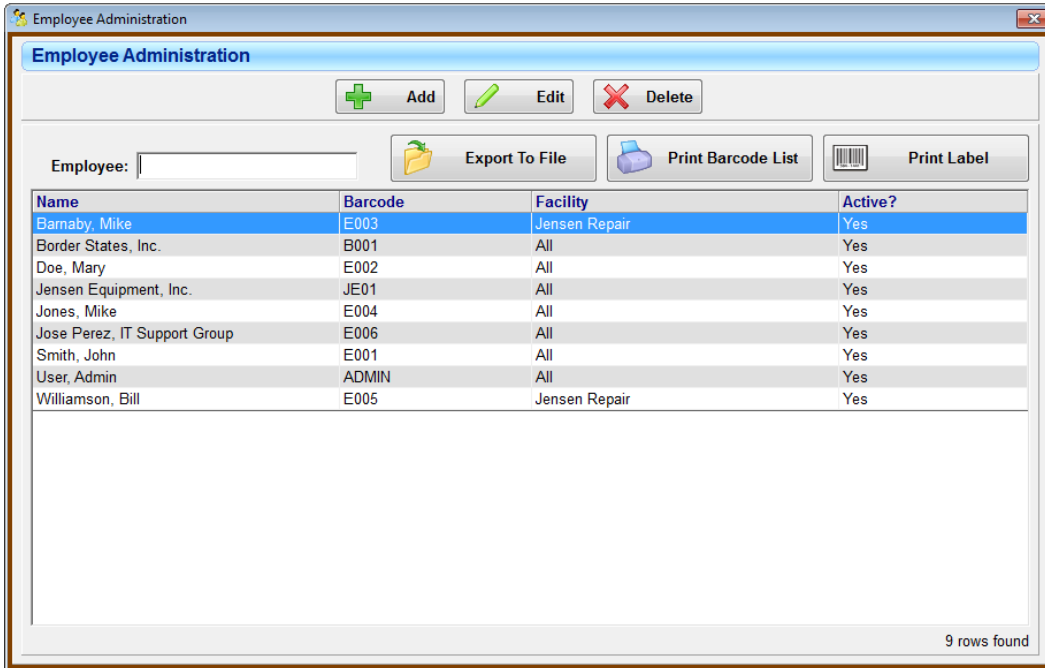
The Available Printers list will display all the printers that are on the Windows printer list.



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.

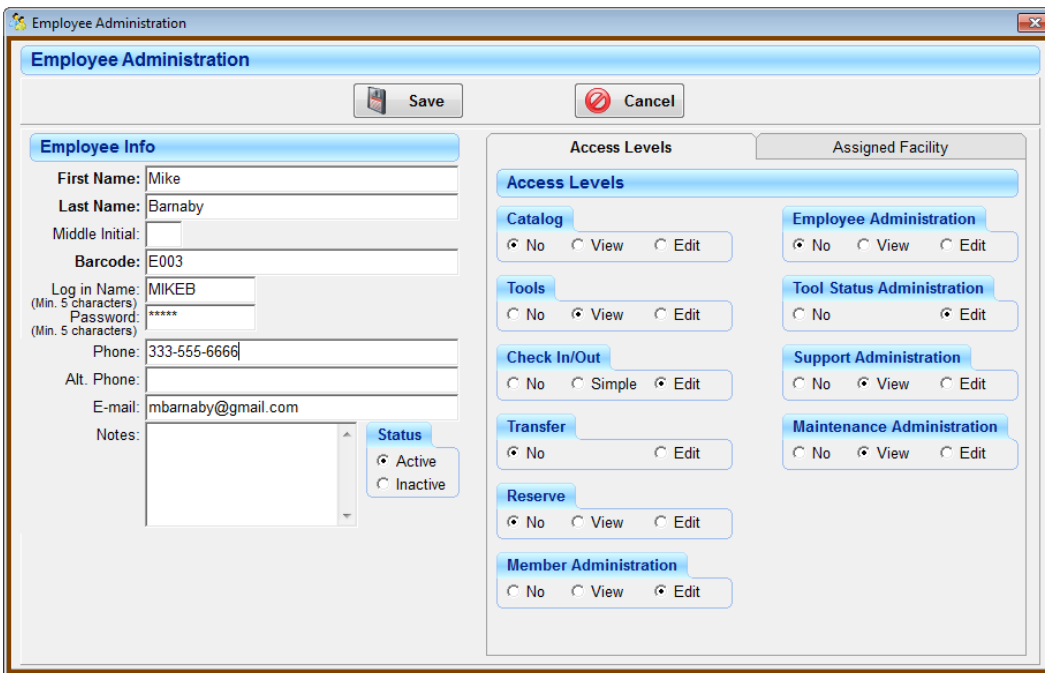
Employee Administration



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

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

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.



Employee Information

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

- The barcode entry must be unique. A barcode for a tool, location, or employee cannot 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.
- If the employee will be using the TTS system, he will require a Log in Name and Password.
- 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.

Employee Access Levels

Once the employee information is entered, set the employee's access level.

There are specific access levels that may be set for each employee. The default access level is for no access to TTS:

- **Master (or Catalog)** – applies to activities associated with creating and editing master data.
- **Tools** - applies to activities associated with creating and editing tool data.
- **Check In/Out** – applies to activities associated with assigning tools to an individual or location, or returning tools to storage.
- **Transfer** – applies to activities associated with transferring tools to facilities.
- **Reserve** – applies to activities associated with creating and editing tool reservations.
- **Member Administration** – applies to activities associated with managing member information.
- **Employee Administration** – applies to activities associated with managing employee information.
- **Tool Status Administration** – applies to activities associated with editing tool status.
- **Support Administration** – applies to activities that support the overall tool process. This will include managing facilities, locations, tool types, classifications, and conditions.

Select the access levels appropriate for the employee.

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. 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.

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 a tool or has an outstanding reservation or is involved in a history record, the system will not allow the employee to be deleted. Set the Status to inactive to prevent further use.

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 Designer 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 user 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.

Import Employees

An import function is available for importing employee information. Select Import Employees under the File menu. Select the Print Instructions button on the screen for file format details.

Account Administration

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

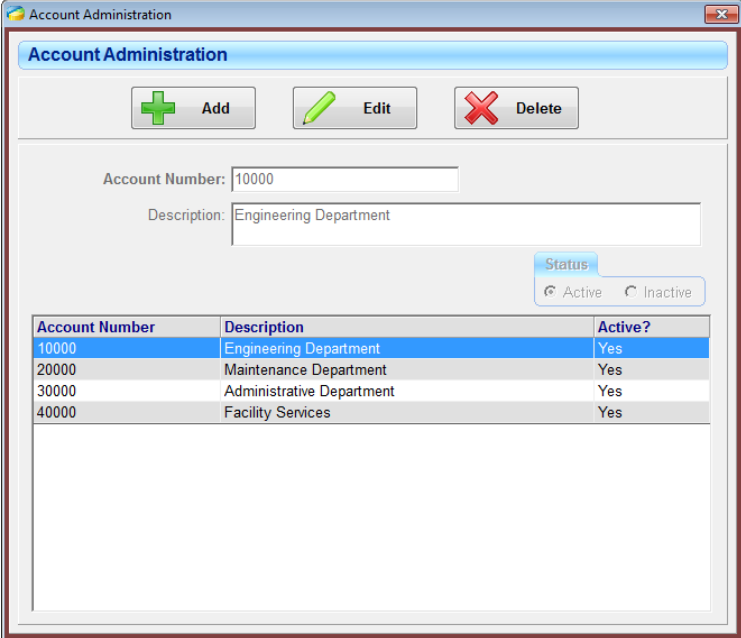
To begin the process, select Account Administration from the Support menu.

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

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.

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 a tool. If so, the system will not allow the Account to be deleted. You may inactivate the Account to prevent it from being assigned to a tool in the future if you desire.



The screenshot shows the 'Account Administration' window. At the top, there are three buttons: 'Add' (with a green plus icon), 'Edit' (with a green pencil icon), and 'Delete' (with a red X icon). Below these buttons are two text input fields: 'Account Number' with the value '10000' and 'Description' with the value 'Engineering Department'. To the right of these fields is a 'Status' section with radio buttons for 'Active' (selected) and 'Inactive'. Below the input fields is a table with three columns: 'Account Number', 'Description', and 'Active?'. The table contains four rows of data.

Account Number	Description	Active?
10000	Engineering Department	Yes
20000	Maintenance Department	Yes
30000	Administrative Department	Yes
40000	Facility Services	Yes

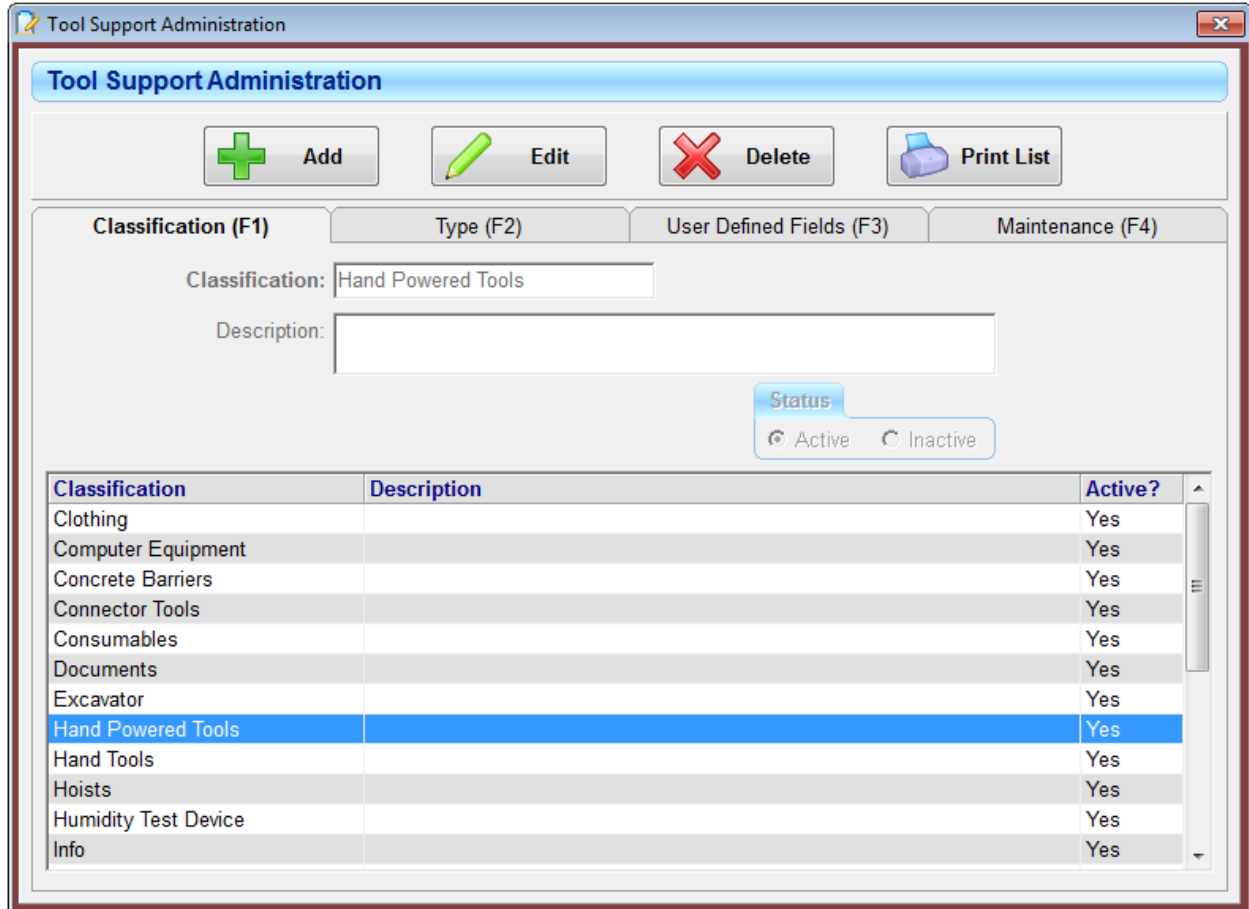
Import Accounts

An import function is available for importing account information. Select Import Accounts under the File menu. Select the Print Instructions button on the screen for file format details.

Tool Support Administration

Tool Support Administration is used to administer Classifications, Types, User Defined Fields and Maintenance. NOTE: User Defined Fields and Maintenance are not available in the Basic edition. To access this process, select Tool Support Administration under the Support menu.

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



Classification (F1)

The first tab is Classification. Tools 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 a tool.
- A Classification set as inactive will not be available for assignment to a tool.

Setting a Classification to inactive may be useful to reduce clutter when assigning Classifications to tools, 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.

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.

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.

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 a tool. 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 tools if you desire.

Type (F2)

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

Type	Description	Dep.	Reservable	Active?
Circular Saw		5	Yes	Yes
Cordless Drill	Battery Powered	5	Yes	Yes
Electric Drill	Corded Electrical Drill	5	Yes	Yes
Hammer Drill		5	Yes	Yes
Jig Saw		5	No	Yes
Reciprocating Saw		5	Yes	Yes

Each Type has a name (Type), Description, and Depreciation period in years.

- 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.
- Tools of this Type can be flagged as reservable by checking the checkbox. This will make them available when using the Reservation function.

TTS User Manual

- A Type set as active may be assigned to a tool.
- A Type set as inactive will not be available for assignment to a tool.

Setting a Type to inactive may be useful to reduce clutter when assigning Types to tools, 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.

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 if the type is reservable.
4. Select the Save button to save the new 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.

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 a tool. 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 tools if you desire.

User Defined Fields (F3)

The third tab is the User Defined Fields. Fields can be added specific to a tool "Type". When new tools are added to the system, the added fields are displayed in the Tool Information screen for user entry.

The screenshot shows the 'Tool Support Administration' window with the 'User Defined Fields (F3)' tab selected. The interface includes the following elements:

- Buttons:** Add (green plus), Edit (pencil), Delete (red X), and Print List (printer icon).
- Classification (F1):** Hand Powered Tools
- Type (F2):** Cordless Drill
- Field Name (F3):** Chuck Type
- Status:** Active (selected) and Inactive
- Table of User Defined Fields:**

Field Name	Active?
Chuck Type	Yes
Torque	Yes
Voltage	Yes

After selecting the appropriate Classification and Type for the tool, 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 tool 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 tool of that type. It will not be displayed on the Tool Information screen. Returning the tool to active will restore prior data for each tool 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 days, months, operating hours, or mileage for required performance. In addition, a “Repair” maintenance item may automatically be inserted when a new “Type” is created. The “Repair” setting is set in the Setup Options screen.

The screenshot shows the 'Tool Support Administration' window with the 'Maintenance (F4)' tab selected. The interface includes the following elements:

- Buttons:** Add (green plus), Edit (green pencil), Delete (red X), and Print List (blue printer icon).
- Classification (F1):** Hand Powered Tools
- Type (F2):** Cordless Drill
- Maintenance Description:** Repair
- Special Instructions:** (Empty text area)
- Interval:** [] Days, or [] Months, or [] Miles, or [] Hours
- Service Reminder Interval:** [] Days, or [] Miles, or [] Hours
- Prevent Check Out / Transfer if Past Due
- Status:** Active (selected), Inactive

Maintenance Description	Days	Months	Miles	Hours	Prevent?	Active?
Repair					No	Yes
Safety Inspection		6			No	Yes

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.
- Interval is the length of time between performing the maintenance activity (i.e., do a Safety Inspection every 3 Months).

- Service Reminder Interval will determine if the maintenance item is displayed on the “Maintenance Due Report”, which can be displayed after log in. The setting for displaying the report is on the Setup Options screen.
- The checkbox “Prevent Check Out/Transfer if Past Due”, if checked, will not allow the tools of this type to be checked out or transferred when the maintenance item is past due.
- A Maintenance item set as active may be assigned to a tool 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 items to tools, 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.

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.

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.

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 a tool. 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 tools if you desire.

Condition Administration

The screenshot shows a window titled "Condition Administration" with three buttons: "Add" (green plus), "Edit" (green pencil), and "Delete" (red X). Below the buttons are input fields for "Condition:" (containing "Excellent") and "Description:" (containing "Near new condition"). There is a "Status" section with radio buttons for "Active" and "Inactive". At the bottom is a table with the following data:

Condition	Description	Active?
Excellent	Near new condition	Yes
Good	Minimal damage typically cosmetic in nature	Yes
Needs Paint		Yes
Needs Repair	Tools and Equipment requiring repair	Yes
Poor	Damage with some functional problems	Yes
RMA		Yes
Schedule Retire		Yes

Tools may be assigned a Condition, which indicates the usefulness of the tool. To access this process, select 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 a tool.
- A Condition set as inactive will not be available for assignment to a tool.

Setting a Condition to inactive may be useful to reduce clutter when assigning Conditions to tools, 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.

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.

To edit an existing Condition, select the Condition to be edited and then select the Edit button. Modify the Condition (name), Description, or Status (Active vs. Inactive). Select the Save button to save the changed Condition.

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 a tool. 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 tools if you desire.

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.

To Add a new facility, select the Add button.

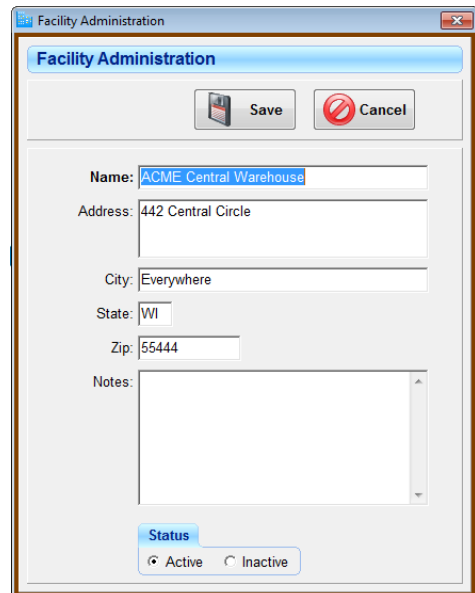
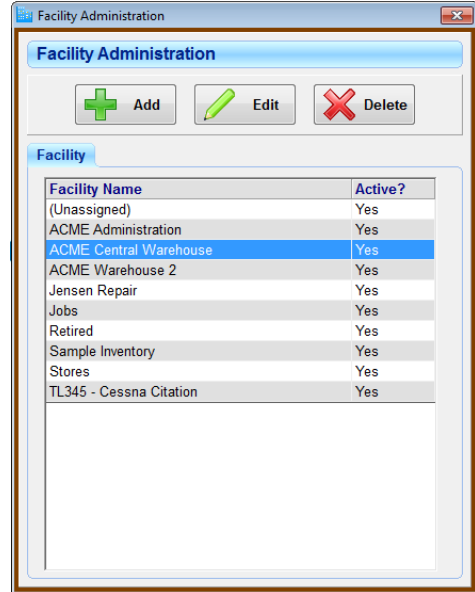
Facility information consists of:

- 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 location assignment.
- A Facility set as inactive will not be available for location assignment.

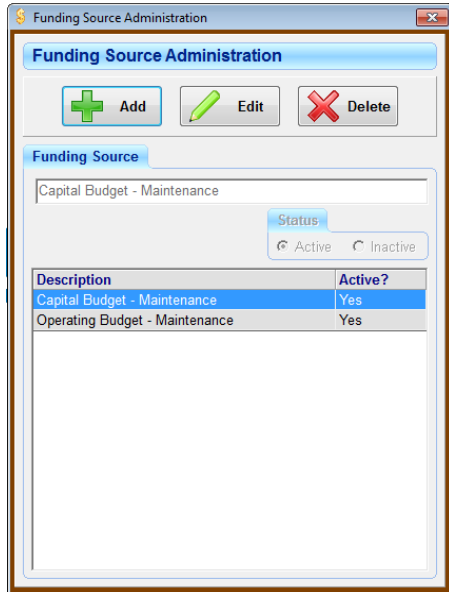
Enter the information as desired. Select the Save button to save the new Facility.

To Edit a Facility, select the Facility of interest and then select the Edit button. Modify the information as desired. Select the Save button to save the Facility changes.

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.



Funding Source Administration



Funding Source Administration is used to keep track of the agency that provided funding for the tool. The Funding Source is not required to use TTS. Note that the name “Funding Source” can be changed on the System Setup screen.

To begin the process, select Funding Source Administration from the Support menu.

To Add a new Funding Source, select the Add button. Enter the description, then select the Save button.

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.

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 a tool. If so, the system will not allow the Funding Source to be deleted. You may inactivate

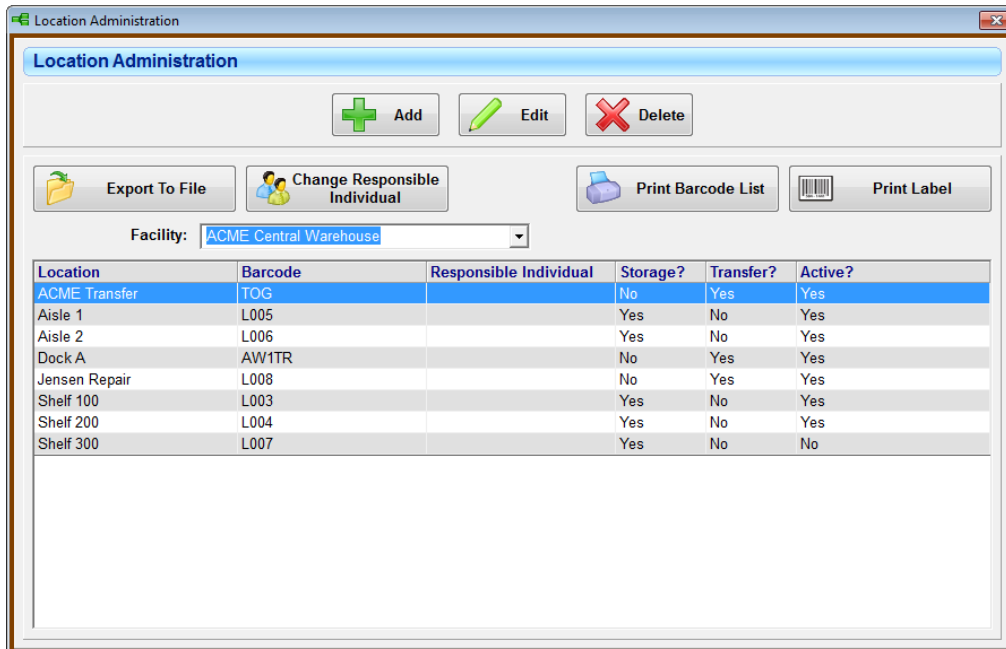
the Funding Source to prevent it from being assigned to a tool in the future if you desire.

Import Funding Source

An import function is available for importing funding source information. Select Import Funding Sources under the File menu. Select the Print Instructions button on the screen for file format details.

Location Administration

Location Administration is used to manage the locations to which tools may be assigned. Select Location Administration from the Support menu. It displays all the locations that exist in the system that are tied to the facility selected.



To Add a new Location, select the Facility to which it is to be added and then select the Add button.

The screenshot shows a software window titled "Location Administration". At the top, there are "Save" and "Cancel" buttons. Below them, there are two main sections: "Add New Facility" and "Add New Employee".

Add New Facility Section:

- Facility:** A dropdown menu with "ACME Central Warehouse" selected.
- Location:** A text input field containing "Shelf 100".
- Barcode:** A text input field containing "L003".
- Location Type:** Three radio buttons: "Checkout/Usage Location" (unselected), "Storage Location" (selected), and "Transfer Location" (unselected).
- Address:** A large empty text area.

Add New Employee Section:

- Responsible Individual:** A dropdown menu.
- Notes:** A large empty text area.
- Status:** Two radio buttons: "Active" (selected) and "Inactive" (unselected).

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 20 characters long and is required. The barcode is used by scanners to speed up check in, check out and inventory processes. The barcode entry must be unique. A barcode for a tool, location, or employee cannot be the same.
- Checkout/Usage Location is a location that tools can be checked out to.
- Storage Location is a location that is used for storage rather than usage.
- Transfer Location is a location that tools transfer to. Only Transfer Locations will be displayed in the transfer function.
- Responsible Individual is an employee that is responsible for the tools at the location. This is not required. If the responsible individual is not in the system, you may go directly to the Employee 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 tool assignment.
- A Location set as inactive will not be available for tool assignment.

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

To Edit a Location, select the Facility containing the Location, select the Location of interest and then select the Edit button. Modify the information as desired. Select the Save button to save the Location changes.

To Delete a Location, select the Location to be deleted and then select the Delete button. The system will check to see if a tool 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 a tool from being assigned to the Location in the future if you desire.

Export List To File

Export To File will export information for the displayed locations to a tab delimited text file.

Change Responsible Individual

Change Responsible Individual will change the responsible individual for all **selected** locations on the screen. Display and select the locations that you want to change. 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 change by left clicking on each one with the mouse.

After the locations are selected, click the Change Responsible Individual button. A screen will appear where you can select a new Employee. Select the new Employee and click the OK button.

Print Barcode List

Print Barcode List will print a list of the displayed location barcodes that can be used for scanning. When the Print Barcode List button is selected, a pop-up window will appear where you can set the barcode row height. This allows you to control the space between barcodes on the list. The minimum row height is 0.5 inch.

Print Location Label

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 Designer 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.

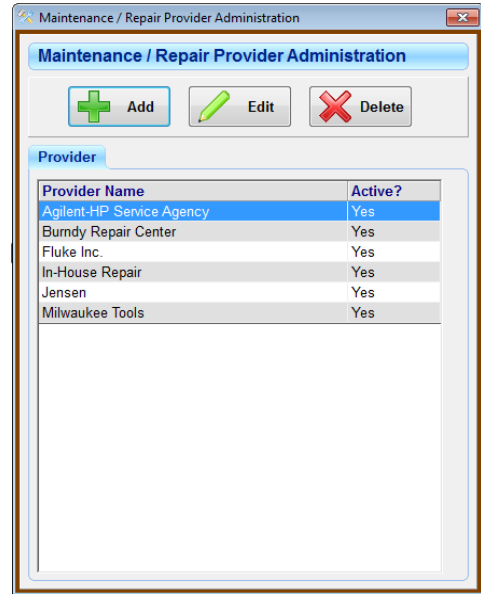
Import Locations

An import function is available for importing location information. Select Import Locations under the File menu. Select the Print Instructions button on the screen for file format details.

Maintenance / Repair Provider

A simple Maintenance / Repair Provider screen allows you to standardize the name of each provider who services your equipment. Select Maintenance/Repair Provider Administration on the Support menu.

You can Add new provider names, edit the name, and delete those providers not already used for prior maintenance. You can also inactivate a provider who is no longer on your list of approved maintenance providers.



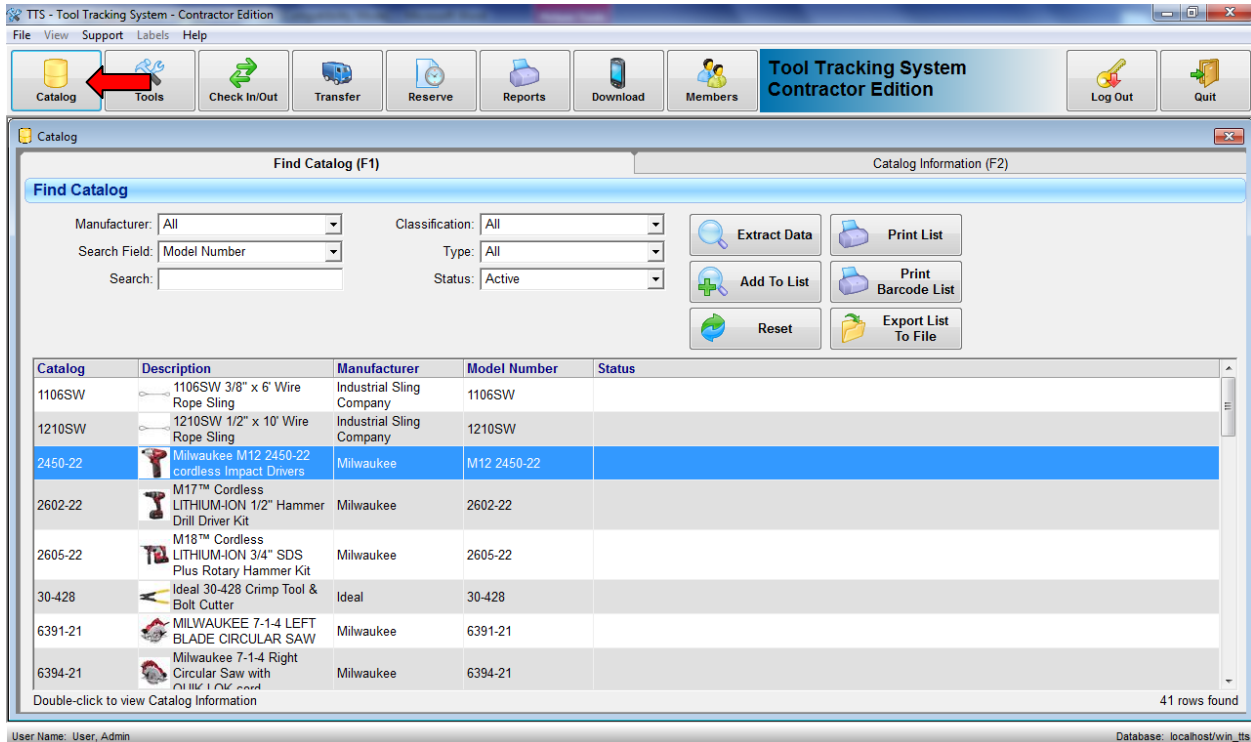
Tool Management

The Tool management portion of the process is used to:

- Create a Master for tool additions
- Add tools to the system
- Print barcodes for the tools
- View tool history
- Limited reporting

Tool Master (Commonly Referred to as the Catalog)

A very beneficial aspect of TTS is the ability to create a Master listing of standard components used by your organization. It is used to ensure that like items are entered into TTS the exact same way. This helps when searching for tools and items within your inventory. The goal is to establish a standardized way of entering your equipment and utilizes a “Master Number” to track each tool. A Model Number can commonly be used as the Master Number since it uniquely identifies the manufacturer and model being tracked. This master list can also be called a Part Master, Item Master, Lot Number, or other common term.



Find Master (F1)

Two tabs are displayed. The first is the “Find” tab allowing you to filter and view those items within the master by:

- Manufacturer
- Classification
- Type
- Status
- And a search by Master Number, Description, or Model

Several key aspects are available on the form. As an example, selecting the Reset button will return all selections to All. In addition, the Master 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.

Search Field

Groups of master records can also be displayed by selecting Description in the Search Field dropdown list, typing words in the Search box, and then selecting the Extract button. For example, type the word “drill” into the box and click Extract. Only tools that have the word “drill” in the description will be displayed.

Add To List

The Add To List button can be used to build a custom list of tools. When selected, it will appear to remain depressed. When in this mode, tools that are extracted will be added to the list of tools already shown on the screen, rather than clearing the screen first. You can continue to change the selection filters and extract the tools you need to build your list. The list can then be printed or exported. Clicking the Add To List button a second time will return the Extract Data function to its normal mode.

Print List

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

Print Barcode List

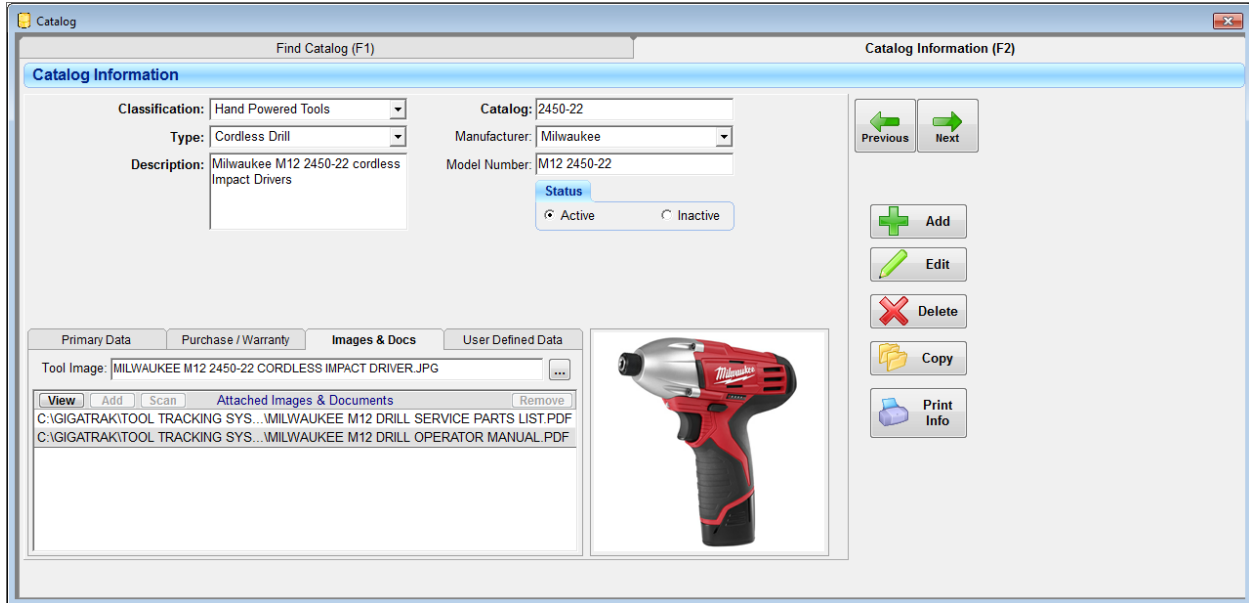
Print Barcode List will print a list of the displayed tool barcodes that can be used for scanning. The list will include the Master Number, Master Barcode, Description, Model, and Status. When the Print Barcode List button is selected, a pop-up window will appear where you can set the barcode row height. This allows you to control the space between barcodes on the list. The minimum row height is 0.5 inch.

Export List To File

Export List To File will export information for the displayed tools to a tab delimited text file.

Master Information (F2)

Any highlighted Master tool can then be viewed in the Master Information by double-clicking the record or selecting the tab.



escribed in the next section). With selected fields included, you are able to standardize the parameters for the Master tool item being entered. A great time-saving feature!

NOTE: If you edit or change any information in the Master Information, you will be prompted as below:

*Do you want to update all matching Tools' data with the Master Information?
This could result in any custom changes to individual tools to be lost.*

This allows any change to be updated in every record tied specifically to this Master Record.

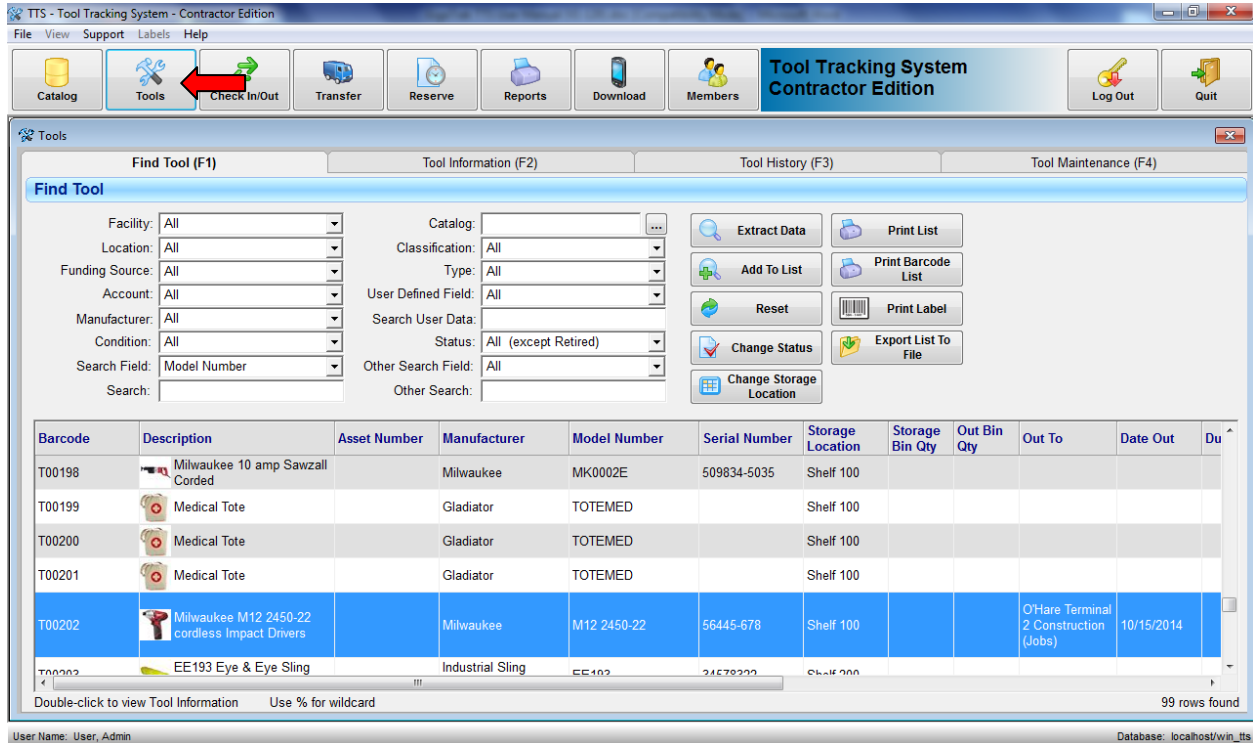
REMEMBER – You only need to add a specific model of tool *ONCE* in the master. The *COPY* function just saves you time to create a similar record but still make appropriate changes to differentiate the tools.

Import Master Items

An import function is available for importing master information. Select Import Master Items under the File menu. Select the Print Instructions button on the screen for file format details

Tools Screen

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



The Tool management form is composed of four tabs:

- Find Tool
- Tool Information
- Tool History
- Tool Maintenance

Find Tools (F1)

The first tab is used to view tools, print a list of tools, and print tool labels. The list of Tools on the screen is controlled by the multiple selections on the upper part of the form. These selections are:

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

- Other Search (Binned Tools, Consumable Only, Assigned to Employee Barcode, Assigned to Location Barcode, and Assigned to Container Barcode)

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

Several key aspects are available on the form. As an example, selecting the Reset button will return all selections to All. In addition, the Tool 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.

Show Thumbnail Images

If an image is assigned to a tool, 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.

NOTE: Some images may be incompatible with this application. This can cause errors when data is extracted on the Find Tool tab. If errors occur, find a tool that does not have an image (or add a new tool without an image) and display it in the grid. Right-click the item in the grid, and uncheck Thumbnail images.



Description	Asset Number
 Milwaukee 1-2in Magnum Drill 0-850RPM	WE00001
 Milwaukee Drill 0-850F	
 Milwaukee 11amp Sawzall	WE00004

The screenshot shows a table with two columns: 'Description' and 'Asset Number'. The first row is highlighted in blue and contains a thumbnail of a Milwaukee 1-2in Magnum Drill 0-850RPM and the asset number WE00001. The second row contains a thumbnail of a Milwaukee Drill 0-850F and is currently selected. A context menu is open over this row, showing two options: 'Show Thumbnail Images' (which is checked) and 'View Image'. The third row contains a thumbnail of a Milwaukee 11amp Sawzall and the asset number WE00004.

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

Search Field

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

To find a specific Tool by its barcode:

- Select Barcode on the Search Field drop-down list
- Select the Barcode text box (background turns yellow)
- Type in the barcode and select the Enter key on the keyboard, or scan the barcode with a wedge type barcode scanner attached to the PC
- If the barcode matches that of a tool, the Tool will appear on the list

Add To List

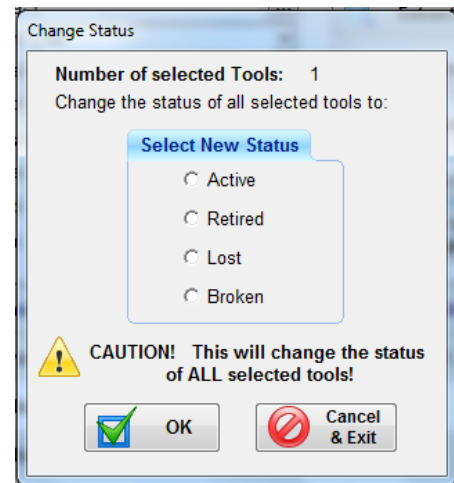
The Add To List button can be used to build a custom list of tools. When selected, it will appear to remain depressed. When in this mode, tools that are extracted will be added to the list of tools already shown on the screen, rather than clearing the screen first. You can continue to change the selection filters and extract the tools you need to build your list. The list can then be printed or exported. Clicking the Add To List button a second time will return the Extract Data function to its normal mode.

Change Status

The Change Status function is used to change the Status of a group of tools all at once. Display and select the tools that you want to change. To select multiple Tools, do one of the following:

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

After the tools are selected, click the Change Status button. A screen will appear where you can select a new Status. Select the new Status and click the OK button.



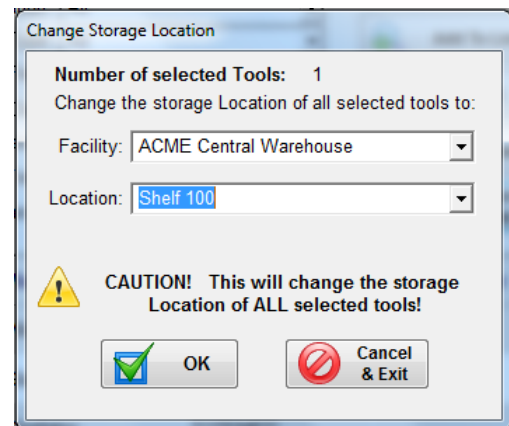
Change Storage Location

The Change Storage Location function is used to change the storage location of a group of tools all at once. Display and select the tools that you want to change.

To select multiple Tools, do one of the following:

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

After the tools are selected, click the Change Storage Location button. A screen will appear where you can select a new Facility and Storage Location. Select the new Facility and Storage Location and click the OK button.



Print List

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

Print Barcode List

Print Barcode List will print a list of the displayed tool barcodes that can be used for scanning. The list will include the tool descriptions, model numbers, and serial numbers. When the Print Barcode List button is selected, a pop-up window will appear where you can set the barcode row height. This allows you to control the space between barcodes on the list. The minimum row height is 0.5 inch.

Print Tool Label

To print tool labels:

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

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

- Drag the mouse over the Tools desired while holding down the left mouse button.
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and the left clicking on the last Tool. All Tools in between will be selected.

- Hold down the Control (Ctrl) key and select the Tools you wish to print by left clicking on each one with the mouse.

Export List To File

Export List To File will export information for the displayed tools to a tab delimited text file.

Tool Information (F2)

Selecting a tool and then selecting the Tool Information tab, or double-clicking on a tool, will bring up the Tool Information screen below.

The screenshot shows the 'Tool Information' window with the following fields and data:

- Catalog: 2450-22
- Classification: Hand Powered Tools
- Type: Cordless Drill
- Description: Milwaukee M12 2450-22 cordless Impact Drivers
- Facility: ACME Central Warehouse
- Storage Location: Shelf 100
- In Service Date: 1/2/2013
- Barcode: T00202
- Asset Number: [Empty]
- Condition: Excellent
- Manufacturer: Milwaukee
- Model Number: M12 2450-22
- Serial Number: 56445-678
- Funding Source: Operating Budget - Maintenanc
- Account: Maintenance Department / 200

Status: Active (selected), Retired, Lost, Broken

Field Name	Data	Date Entered
Chuck Type:	1/4" Hex Speed Chuck	8/7/2014
Torque:	850 in-lbs	8/7/2014
Voltage:	12vdc Lithium	8/7/2014

Tool 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 tool information is:

- Master Number is a selection to pull down general Tool information from the Master screen
- Classification is a method of grouping Tools
- Type is a subset of Classification and a second method of grouping Tools
- Description is up to 80 characters describing the Tool
- Facility is the building in which the Tool is located
- Storage Location is the default storage location for the Tool
- In Service Date is the date the tool was put into service (defaults to current date)
- Barcode is the barcode that identifies the Tool. You must enter the first tool'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
- Asset Number is your asset number, up to 30 characters
- Condition is the physical condition of the Tool. Condition does not apply to bin items
- Manufacturer is the manufacturer of the tool (data entered on the Manufacturer Administration screen)
- Model is the model number of the Tool
- Serial Number is the Serial Number of the Tool
- Funding Source is the agency that provided the Tool (User Definable Field)
- Account is the account number used to purchase the Tool
- Status. An Active tool may be checked out, A Retired Tool may not be checked out

Primary Data Sub-tab

- Note is up to 255 characters of information about the Tool
- Container allows other tools to be checked out to the container itself (i.e. tool box)
- Binned Item is used for small items that cannot be individually bar coded. If the Binned Item checkbox is checked, an option will appear to mark the tool as a Consumable. Boxes will also appear to enter a Storage Bin Quantity and a Reorder Point
- Check Out shows who or where the tool is checked out to (employee or location)
- Due Date is the date the Tool is due to be checked in

Purchase / Warr. Sub-tab

- Purchased From allows entry of general supplier information
- Warrant Expiration Date tracks when a warranty period expires
- Depreciation period in years (does not apply to bin items)
 - NOTE: fields relating to Depreciation will not be visible unless the “Show Depreciation” checkbox is checked on the Setup Options screen.
- Depreciation Type. The system will calculate depreciation based on five methods: Standard Straight Line, MACRS Half-Year, MACRS Mid-Quarter, MACRS Double Declining Half Year, and MACRS Double Declining Mid Quarter
 - MACRS means Modified Accelerated Cost Recovery System
- Original Value is the cost basis for depreciating the Tool
- Salvage Value is the remaining value of the tool after it has been fully depreciated
- Current Value is the current depreciated value of the Tool (calculated)
- Date for Current Value is the date used to calculate the current value
- Miscellaneous is a user definable field that can be used as desired

Images & Docs Sub-tab

- Tool Image is the path to a file that contains a picture of the tool. If the image information is entered and a file is at the proper location, the picture will be displayed in the area to the right of the sub-tab section. Double clicking on the image will display a full sized image of the picture. In addition, linked documents, PDF, URLs, and other related files can be assigned to the Tool

User Defined Data Sub-tab

- User Defined Fields stores additional information specific to the type of Tool

If a tool with user defined data is edited and the Type is changed, it is possible that duplicate user defined fields will appear. This can happen if the new Type has the same user defined field names as the previous Type. The new field will be blank and the old field will have data.

Primary Data		Purchase / Warr.		Images & Docs		User Defined Data		Miles / Hours	
Field Name		Data		Date Entered					
Chuck Type:		1/4" Hex Speed Chuck		8/7/2014					
Torque:		850 in-lbs		8/7/2014					
Voltage:		12vdc Lithium		8/7/2014					

To correct this, Edit the tool and enter the user defined data into the blank field. Then blank out the data in the old field. When the tool is Saved, a message will appear to indicate that user defined fields were found that do not belong to the selected Class and Type. It will ask if you want to delete the fields. Respond “Yes” to the prompt.

Miles / Hours Sub-tab

- Miles and Hours can be entered along with associated dates. This is used in the Tool Maintenance section.

Binned and Consumable Items

Binned and Consumable items *must be selected at the time the tool is entered via the Add button*. Due to the different methods that bin and consumable data is tracked in the system, **the Bin selection cannot be changed with the Edit function**.

Binned items are small items that would not be individually bar coded, such as screwdrivers. They would be located in a common bin with a single barcode. When they are checked out, they are expected to be returned.

Consumable items are a subset of binned items. Consumables are items that are checked out but **not** expected to be returned, such as gloves.

Binned and Consumable items have a Reorder Point. This is the minimum quantity that you want to keep in inventory. When the Storage Bin Quantity reaches the Reorder Point, the item will appear on the "Bin Tools Below Reorder Point" report.

Adding a New Tool

To Add a new Tool, select the Add button. All information is cleared and the Save and Cancel buttons appear. You can pre-enter in information by selecting a Master Number or enter in all information without referencing the Master Number.

If turned on in System Setup, the system will automatically generate a unique barcode for the tool if the barcode field is blank. If a specific barcode number is needed, just enter the number manually. Each barcode number must be unique. Select or enter the required information (bold labels). Enter the non-required information if desired. Save the Tool by selecting the Save button. The screen will return to the original state with the new Tool 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 Tool

To Edit an existing Tool, select the Edit button. The Save and Cancel buttons appear.

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

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

Copying an Existing Tool's Information to a New Tool

This is one of the most helpful features when multiples of the same type of tool needs to be entered. To Copy an existing Tool's information to use in creating a new tool, 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 system will automatically generate a unique barcode for the tool. If this barcode is unacceptable, it can be typed over by the user. The barcode entry must be unique. A barcode for a tool, location, or employee cannot be the same. Change the Tool's information as desired and add the new barcode. Save the Tool by selecting the Save button, the screen will return to the original state with the new Tool information.

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

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

Import Tools

An import function is available for importing tool information. Select Import Tools under the File menu. Select the Print Instructions button on the screen for file format details.

Import Miles and Hours

An import function is available for importing tool miles and hours information (not available in Basic Edition). Select Import Miles and Hours under the File menu. Select the Print Instructions button on the screen for file format details.

NOTE: This import will not add new tools to the database. It will only update the miles and hours of existing tools.

Tool History (F3)

Selecting a tool and then selecting the Tool History tab will bring up the Tool History screen below.

Date	Type	From	To	Condition	Bin Qty	Transaction By	Check Out Note
10/15/2014 04:26 PM	Checked out	Shelf 100	O'Hare Terminal 2 Construction	Excellent		User, Admin	
1/2/2013 04:24 PM	Added New Tool	Shelf 100		Excellent		User, Admin	

The screen displays the history of the selected tool 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 prior to a specified date, enter the date in the Date text box and then select the Purge button. All history records prior to the date specified will be deleted.

Tool Maintenance (F4)

Selecting a tool and then selecting the Tool Maintenance tab will bring up the Maintenance Items/History screen below.

Maintenance / Repair Type	Special Instructions	Interval	Last Done	Next Due
<input type="checkbox"/> Repair				
<input type="checkbox"/> Safety Inspection	Perform a visual inspection and basic test to ensure safe operation.	6 mo.	In service 1/2/2013	07/02/2013

The Maintenance Items tab lists the Maintenance/Repair Type(s) setup previously on the Tool 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. 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 Maintenance 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, select the Maintenance History tab and then select the Print Maintenance History button.

Check In/Check Out Tools

The Check Out process is used to check tools out to an employee or location. The Check In process is used to check tools into storage from an employee 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.

Check Out (F1)

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

Barcode	Description	Due Date	Out Date	Condition	Person	Facility	Location	Container	Bin Qty	Mi
T00001	Milwaukee 1/2in Magnum Drill 0-2800RPM	11/20/2014	11/4/2014 9:26 AM	Good		Jobs	O'Hare Terminal 2 Construction			
T00003	Milwaukee 10 amp Sawzall Corded	11/20/2014	11/4/2014 9:26 AM	Good		Jobs	O'Hare Terminal 2 Construction			
T00020	Burdy Patriot 18 Volt Hydraulic Self-Contained 14-Ton Crimping Tool	11/20/2014	11/4/2014 9:26 AM	Excellent		Jobs	O'Hare Terminal 2 Construction			

To check out tools:

- Select a Container, Location, Employee or Member Category (Contractor Edition only) to which the tool will be checked out
- If desired, enter the due date for the return of the Tool. Enter a date in the Due Date box, or enter a Default Interval (number of days from today)
- Scan the Tool barcode
- If the Tool is a binned item, a box will appear below the barcode to enter the quantity being checked out

The tool checkout information will be displayed in the grid. To check out another tool to the same location/employee and with the same due date, scan another tool 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.

Once items are displayed in the grid, the Out Date/Time can be changed by clicking the Change Out Date/Time button. A confirmation box will appear to indicate that the date/time will be changed for ALL items shown in the grid. Responding "Yes" will display a calendar where you can select the desired date and time.

When all desired tools have been checked out, select the Save or Save/Print button. The check out information will be saved and, if Save/Print was selected, the system will ask if you wish to 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 By Tool (F2)

To check in an individual tool, select the Check In by Tool tab. The screen will change as indicated below.

The screenshot shows the 'Check In/Out' application window. At the top, there are buttons for 'Save', 'Save / Print', 'Reset / Clear', and 'Remove Item'. Below these are three tabs: 'Check Out (F1)', 'Check In by Tool (F2)', and 'Check In by Container / Person / Location (F3)'. The 'Check In by Tool (F2)' tab is active. It features a 'Tool Barcode' field with a yellow background and a 'Description' field. A 'Change In Date/Time' button is located below the description field. To the right, there is a preview window showing a red and black cordless tool. Below the preview is a table with the following data:

Barcode	Description	Due Date	In Date	Condition	Facility	Location	Bin Qty	From	Status	Miles	Hours
T00020	Burndy Patriot 18 Volt Hydraulic Self-Contained 14-Ton Crimping Tool	11/20/2014	11/4/2014 9:27 AM	Excellent	ACME Central Warehouse	Shelf 100		O'Hare Terminal 2 Construction			

To check a tool into storage, scan the tool barcode or enter the tool barcode and then press the Enter Key on the keyboard. If the tool 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.

Once items are displayed in the grid, the In Date/Time can be changed by clicking the Change In Date/Time button. A confirmation box will appear to indicate that the date/time will be changed for ALL items shown in the grid. Responding "Yes" will display a calendar where you can select the desired date and time.

When all tools have been checked in, select the Save or Save/Print button. The check in information will be saved and, if Save/Print was selected, the system will ask if you wish to 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.

Check In can also be performed on the handheld unit.

Check In By Container / Person / Location (F3)

To check in tools assigned to either a container, an employee or a location select the Check In by Container / Person / Location tab. The screen will change as indicated below.

Chk	Barcode	Description	Due Date	In Date	Condition	Facility	Location	Bin Qty	Status	Miles	Hours
<input checked="" type="checkbox"/>	T00001	Milwaukee 1/2in Magnum Drill 0-2800RPM	11/20/2014	11/4/2014 9:28 AM	Good	ACME Warehouse 2	Shelf 101				
<input type="checkbox"/>	T00003	Milwaukee 10 amp Sawzall Corded	11/20/2014	11/4/2014 9:28 AM	Good	ACME Warehouse 2	Shelf 101				
<input checked="" type="checkbox"/>	T00020	Burndy Patnet 18 Volt Hydraulic Self-Contained 14-Ton Crimping Tool	11/20/2014	11/4/2014 9:28 AM	Excellent	ACME Central Warehouse	Shelf 100				
<input checked="" type="checkbox"/>	T00021	Burndy 18V Hydraulic Self-Contained Cutter		11/4/2014 9:28 AM	Excellent	ACME Central Warehouse	Shelf 200				
<input checked="" type="checkbox"/>	T00085	Milwaukee 10 amp Sawzall Corded		11/4/2014 9:28 AM	Needs Repair	ACME Central Warehouse	Shelf 100				
<input checked="" type="checkbox"/>	T00195	6 Foot Aluminum Step Ladder		11/4/2014 9:28 AM	Excellent	ACME Warehouse 2	Shelf 101				
<input checked="" type="checkbox"/>	T00202	Milwaukee M12 2450-22 cordless Impact Drivers		11/4/2014 9:28 AM	Excellent	ACME Central Warehouse	Shelf 100				

To check a tool into storage, first select or scan the container, employee or location barcode the items are being returned from. A listing of all items checked out to the container/employee/location will be displayed. You can then click the check box for each line item being returned. Binned item quantities can also be changed in the grid if desired.

A Check All option box will check or uncheck all checkboxes for each line item listed. Alternately, you can scan individual tool barcodes to check the checkbox. You can also change the status to Lost or Broken for any items checked. The change occurs on Save. If someone returns multiple tools but has lost others, check-in the returned items first and Save. Then, do a new check-in for the individual and confirm that the remaining items listed are lost. Check All and Change Status to Lost then Save. The COPY ROW function allows you to split up binned items being returned so that alternate locations can be assigned. Verify the QUANTITY is correct before saving!

Once items are displayed in the grid, the In Date/Time can be changed by clicking the Change In Date/Time button. A confirmation box will appear to indicate that the date/time will be changed for ALL items shown in the grid. Responding "Yes" will display a calendar where you can select the desired date and time.

When all tools have been checked in, select the Save or Save/Print button. The check in information will be saved and, if Save/Print was selected, the system will ask if you wish to 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.

Check In can also be performed on the handheld unit.

Transfer Tools

Transferring Tools is a process used to relocate tools from one Facility/Location to another. To start this process, select the Transfer Tools button. Keep in mind that only Facility/Locations designated as a Transfer Location on the Location Administration screen will be displayed in this form.

Understanding the basic transfer process is important. Just because an originating location transfers “Out” tools to a destination location does not mean that all of the tools arrive as intended. To manage this process requires BOTH the sender and receiver to acknowledge the items being transferred. If the sender lists ten (10) tools that they sent, but the receiver only acknowledges eight (8) tools – two (2) tools are now unaccounted for. It becomes the responsibility of both parties to resolve the discrepancy. The remaining two (2) tools will still be shown in the Transfer Out screen of the sender and must be reconciled at some point. If lost, the best method to correct the problem is to:

1. The sender selects the lost tools in the Cancel Transfer screen and saves the transaction. The tools are now in the sender’s inventory.
2. The sender then selects the individual record for each lost tool and changes the tool status to “Lost”. Inventory is now accurate until the lost tools are found.

Transfer Out (F1)

The Transfer Out process allows the user to select a Location Barcode that the selected tools will be transferred to. Once a location is selected, the user then scans all of the tool barcodes being transferred. You must enter the quantity being transferred for binned items. **CAUTION:** When transferring binned items, the system will try and match up barcode IDs based on the Master ID of the item being transferred. Adjustments to inventory may be necessary should IDs not match.

Barcode	Description	Out Date	Facility	Location	Bin Qty
T00012	M17™ Cordless LITHIUM-ION 1/2" Hammer Drill Driver Kit	11/4/2014 9:33 AM	ACME Central Warehouse	TRANSFER TO AW2	
T00020	Burndy Patriot 18 Volt Hydraulic Self-Contained 14-Ton Crimping Tool	11/4/2014 9:33 AM	ACME Central Warehouse	TRANSFER TO AW2	

Cancel Transfer (F2)

The Cancel Transfer process allows the sender to cancel items being sent, and returns them to inventory. Select the Cancel Transfer tab on the Transfer form to proceed.

To cancel a transfer, the user needs to first select the destination location where the tools were “Transferred Out” to. It is important to note that only those inventory items not yet “Transferred In” by the receiving location will be listed. The user only needs to check off the line items being cancelled and save the transaction.

Transfer In (F3)

Transfer In

Transfer Out (F1) Cancel Transfer (F2) Transfer In (F3)

Loc. Barcode: Location: TRANSFER TO AW2

Check All Only checked rows will be transferred in Change Location:

Chk	Barcode	Description	In Date	Location	Bin Qty
<input type="checkbox"/>	T00012	M17™ Cordless LITHIUM-ION 1/2" Hammer Drill Driver Kit	11/4/2014 9:34 AM		
<input checked="" type="checkbox"/>	T00020	Burdry Patnot 18 Volt Hydraulic Self-Contained 14-Ton Crmping Tool	11/4/2014 9:34 AM		

The Transfer In process allows the receiver to acknowledge receipt of transferred items being sent to their inventory. If all items are receipted, just select Check All and Save. If by chance you desire to change the receipted location, select the Change Location dropdown. Any checked items will be relocated to the designated location upon Save.

Reserving Tools

Reserving Tools is a process used to reserve the use of a tool for a specified period of time. To start this process, select the Reserve button. The screen below will be displayed.

Find Reservations (F1)

The Reserving Tools process is composed of two (2) tabs. The first tab is the Find Reservations process. This is used to find the current reservations for a tool or employee/location.

Find Reservations

Reservation Type: All

User / Location Barcode: Name: Phone: Alt Phone:

Tool Barcode: Des: Model Number: Serial Number:

From: To:

User	Tool	From	To	Priority	Notes
J003 - CHase Terminal 2 Construction (J003)	T00012 - M17™ Cordless LITHIUM-ION 1/2" Hammer Drill Driver Kit	8/6/2014	8/6/2014	Medium	
E002 - Doe, Mary	T00010 - Milwaukee 7-1/4 Right Circular Saw with QUIK-LOK cord	9/24/2014	11/5/2014	Medium	
E002 - Doe, Mary	T00012 - M17™ Cordless LITHIUM-ION 1/2" Hammer Drill Driver Kit	12/31/2013	1/3/2014	Low	
E001 - Smith, John	T00009 - MILWAUKEE 7-1/4 LEFT BLADE CIRCULAR SAW	10/22/2013	10/29/2013	Medium	

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

To view the reservations for a tool, scan the Tool barcode into the Tool Barcode text box and the reservations for the Tool 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.

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.

Reservation Admin (F2)

Tool Reservation

Find Reservations (F1) Reservation Admin (F2)

Reservation Admin

Save Cancel

Location Employee Contractor

Location Barcode: J003 Name: O'Hare Terminal 2 Construction (Jobs)

Tool Barcode: T00012 Des: M17™ Cordless LITHIUM-ION 1/2" Hammer Drill Driver Kit
Model Number: 2602-22
Serial Number: TG45345

From: 8/6/2014 To: 8/6/2014

Note:

Priority

High Medium Low

The second tab is the Reservation Admin process. 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.
- Scan the Location, Employee or Member barcode or select the Find button.
- Scan the Tool barcode or select the tool.
- Set the date range for the reservation.
- Select a Priority. High Priority items cannot be checked-out to any person or location except the one holding the reservation. Low/Medium Priority settings alert the person checking out the tool if it is to a different location/user than the one holding the reservation.
- If you desire, add a note and set the priority, then select the Save button.

To edit an existing reservation:

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

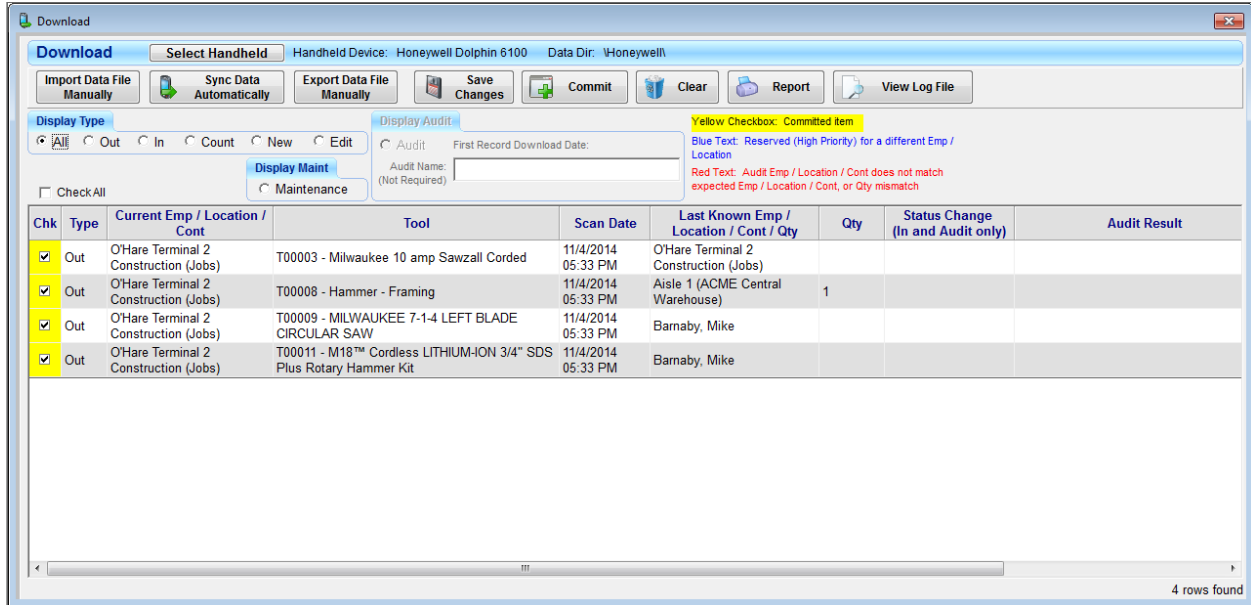
To delete an existing reservation:

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

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

Download Handheld

The system provides a function for a batch handheld scanner. The user must first configure the PC for the handheld in use. Click the Select Handheld button on the Download screen to select the handheld device you are using. You can also select Handheld Configuration on the File menu to select a handheld.



The mobile Tool Tracking application must be installed on the handheld (See TTS Mobile Handheld Application).

Before using the handheld, it must be synced with the PC application to transfer data to the handheld. Dock the handheld to the PC and select the Sync Data Automatically button on the Download screen. **Handhelds should be synced with the PC before each use to ensure that they have the latest data.**

To sync data manually, see the TTS Mobile Handheld Application section in this manual.

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. Dock the handheld to the PC and select the Sync Data Automatically button. If a memory card is being used, insert the card into the PC card reader and select the Import Data File Manually button.

If the download is successful, the system will display a successful message and 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.

If there are audit records stored in the temporary database table, the grid will display the existing audit records. If the handheld contains records that are part of the existing audit, you may add its records to the existing audit as long as the existing audit has not started the commitment process. If commit has been started or the handheld audit is separate from the existing audit, then the existing audit must be completed and cleared from the database prior to uploading the new audit records.

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.

Commit Download Data to the Database

There could be some erroneous data in the grid. Therefore the system will only commit those records that have the Chk column checked. This allows the user to control what records will be loaded into the database.

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 tool data.

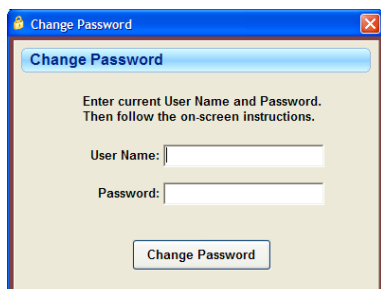
The Commit button will save the information in the audit records that have been checked to the permanent portion of the database. The background color of the checkbox will turn yellow after those records have been committed. An audit may be committed several times. Records that were previously committed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

IMPORTANT! -- The Commit function changes tool 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 audit table in the database, making way for new audit 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.

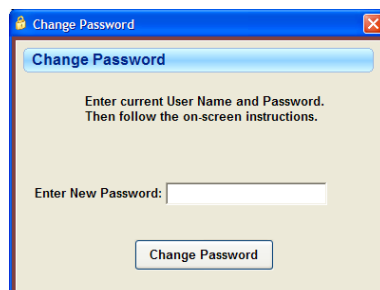
Change Password



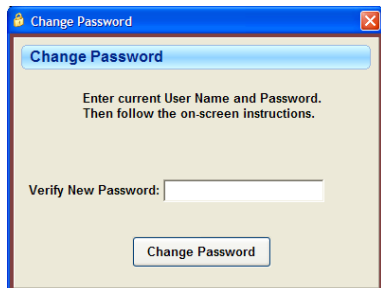
A user currently logged into TTS may change their password at any time. Select Change Password from the File menu and the screen at left appears.

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

The screen changes as indicated below.



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



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

The screen will change as indicated below.

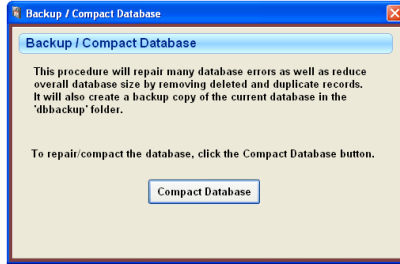
Type in your new password again. If the password matches the new password you typed earlier, the system will save the new password and the Change Password screen will disappear.

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.

Backup / Compact Database

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



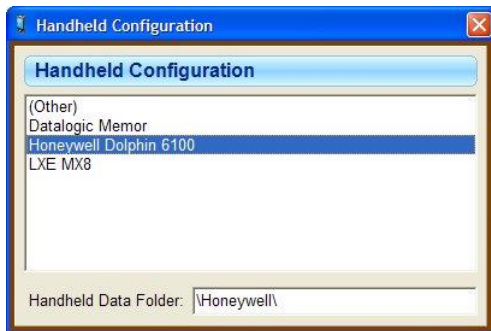
It is possible that the Access database can get corrupted. Compacting the database may repair the damage. In addition, a previous compact operation will have created a backup of the database that can be used if the current database is corrupted beyond repair.

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.

To compact the database, select Compact Database under the File menu. Then select the Compact Database button.

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



Handheld Configuration

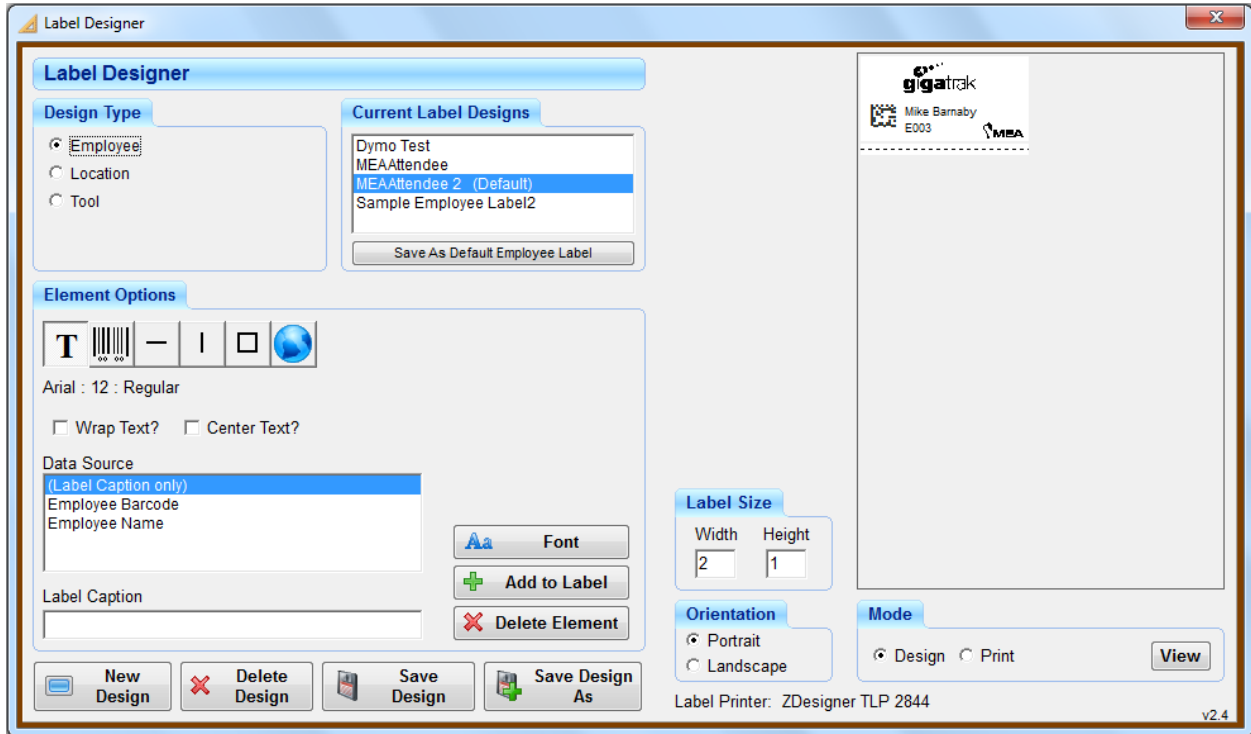
The Handheld Configuration screen is used to select the handheld device. This version of TTS currently supports Windows Pocket PC and CE handhelds.

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

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

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:

- Tools
- Employee Administration
- Location Administration
- Member (Contractor edition only)

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 Employee label.

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

- a. In “Element Options” select the barcode button.
- b. In the “Data Source” list box, select “Tool Barcode”.
- c. Click the “Add to Label” button to put it in your label design.
- d. Drag the element to the desired position.

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

- 1) In “Element Options” select the “T” button.
 - 2) In the “Data Source” list box, select “Tool 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 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.

Save As Default

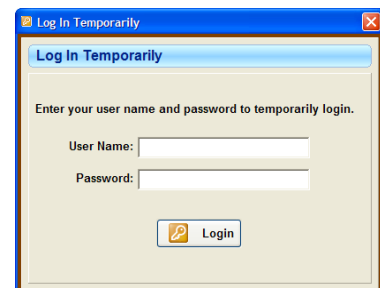
To save a label design as default for a specified process, select the Design Type (process), and select the label design from the Current Label Designs list. Then select the Save as Default button.

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

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.



The banner on the main screen will turn red. As long as someone is temporarily logged into the system these conditions will remain.

When the user temporarily logged in logs out by selecting the Log Out button, the main screen will return to normal and the original user is the current user.

Print Screen

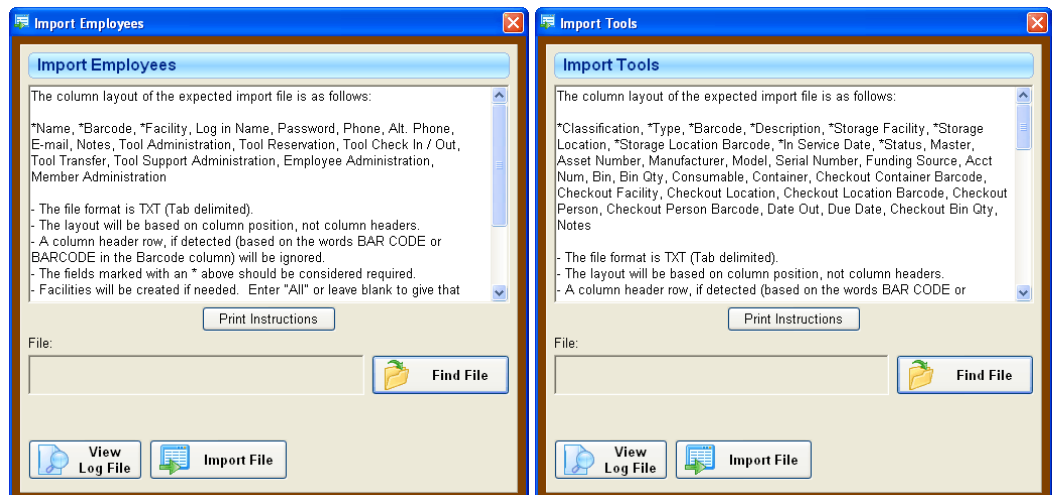
Print screen is used to print the current screen that is displayed in the TTS system to the default printer set for the computer. It will not print the main screen. To print the current screen, select Print Screen under the File menu.

Import Options

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:

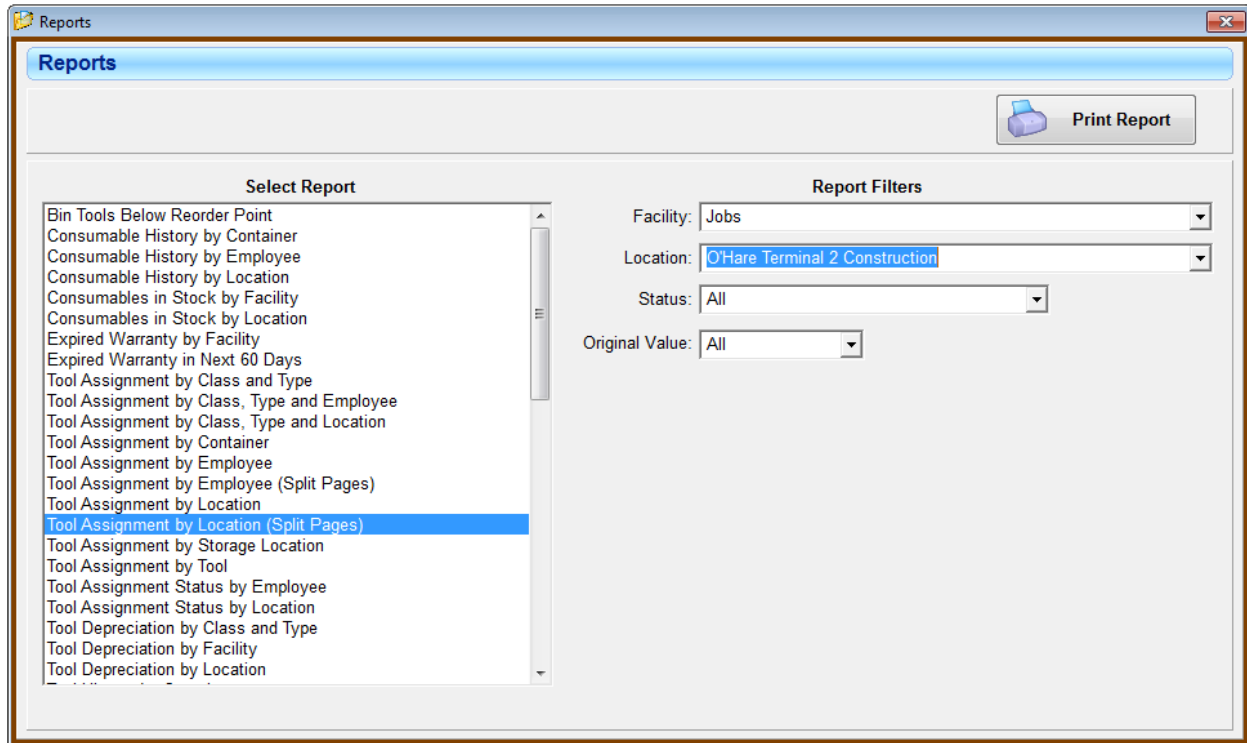
- Import Accounts: Allows the import of account data into the Account Administration table.
- Import Employees: Allows the import of employee data into the Employee Administration table. The import even allows for the granting of specific access rights to the various functions in TTS.
- Import Funding 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 Mileage and Hours: For those users recording equipment hours or mileage, an import function streamlines data entry to update current operating hours and mileage when desired.
- 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.



Reports

Version 1.3 and later has an all new XML reporting function. More reports are now available with your logo option. Selecting the Reports button on the main screen displays the screen below.



Each report has a different set of Report Filters that the user can select to create the report results they desire. When the filters are set, the user then selects the Print Report button. A print preview screen will be displayed from which the report may be printed, PDF'd or Email(ed) (only if Microsoft Outlook is used).

Auto E-Mail Reports

The Tool Assignment and History Reports (see screen above) give you the ability to Auto E-mail the report when desired. Select "Email Report(s)" so that each person gets their own email with their information. Only employees/members with an email address record will receive their email report.

Other Reports

All other reports follow a similar selection process depending on the report selected. Make sure to select all settings necessary to generate the report you desire.

Custom Reports

If desired, GigaTrak can provide custom reports at your request. These reports will be quoted separately and automatically added to the Select Report listing when installed.

Check For Update

Access to the Check for Update function is only available when the ADMIN login is used. After logging in, select Check for Update on the Help menu. You must have a current Support Agreement in place to download updates. Major updates may require you to contact GigaTrak and receive a special download.

TTS Mobile Handheld Application

Two types of handheld applications are available, batch mode and wireless.

Batch vs. Wireless Handhelds

Batch handheld units hold data in a mobile database file that gets transferred back and forth between the handheld and the host PC. These units will work with both Microsoft Access and Microsoft SQL Server host databases. The handheld must be docked with the host PC to perform the transfer. The tool data on the handheld is a snapshot of the data on the host PC. If there are multiple users changing data on the host database, the handheld data may be outdated in a short period of time. Therefore, it is important to synchronize the handheld with the host PC often, so that it has current information.

Wireless handheld units communicate with the host database in real time. This requires the host database to be Microsoft SQL Server. Your facility will have to have a wireless infrastructure in place for communication. No data is stored on the handheld.

Communication With Host PC

Communication software must be installed on the host computer. Choose the correct software based on the operating system of the host computer.

Microsoft Active Sync Installation (For Windows XP)

- 1) Locate a copy of the latest version of Active Sync for your computer system. The correct version is available from Microsoft's WEB site. Version 4.5 is the latest from Microsoft as of this printing.
- 2) Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.
- 3) Leave Active Sync running to install and connect your handheld computer.

NOTE: Some users may use a single PC to connect multiple handheld computers. If this is the case, it is best to setup your PC to recognize each handheld as a "Guest". This avoids having Active Sync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided "GuestOnly.reg" file. It will instantly update your system for future connections.

Windows Mobile Device Center Installation (For Windows Vista or Windows 7)

- 1) Locate a copy of the latest version of Windows Mobile Device Center for your computer system. The correct version is available from Microsoft's WEB site.
- 2) Look for the installation file (i.e. drvupdate-x86.exe) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.

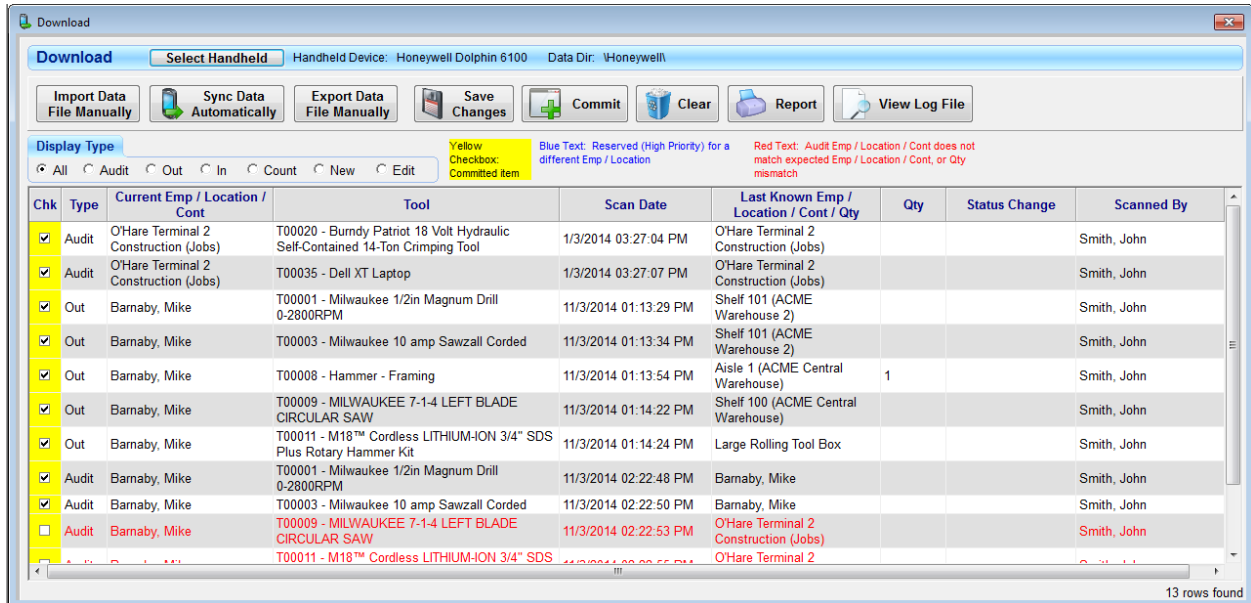
Install GigaTrak Handheld Application

The handheld application can be found in the Handheld folder of your installation CD or download.

- 1) Connect the handheld docking station to your computer (typically a USB connection) and plug in the AC power cable.
- 2) Put the handheld in the dock and wait for it to sync with the PC.
- 3) On the PC, double-click the handheld setup file for the application you are installing (e.g., setup_honeywell_hh.exe).

Sync With Host PC

The batch handheld must be synchronized with the Tool Tracking application on the host computer before it can be used. This will load the current tool information onto the handheld.



- 1) Start the Tool Tracking application on the host computer and select the Download button.
- 2) If your handheld device is not displayed on the screen title bar, click the Select Handheld button and select it.
- 3) Put the handheld in the dock and wait for it to sync with the PC.
- 4) Select the Sync Data Automatically button to begin the data transfer. Do not remove the handheld from the dock until the data transfer is complete.

Sync Manually via SD Card

- 1) Install the handheld application to the SD card. The SD card will display on the handheld in My Device as \SDCard (the actual folder name will vary between handheld models.)
- 2) Remove the SD card from the handheld, and place it into the card reader in the PC. Determine the drive letter assigned to the SD card (i.e. E:\).
- 3) In TTS on the PC, go to the Download screen, and click Export Data File Manually. Select E:\ and click OK.
- 4) When the process is complete, safely remove the SD card from the PC and re-insert into the handheld.
- 5) Collect your data, and when finished, repeat step 2.
- 6) In TTS on the PC, go to the Download screen, and click Import Data File Manually. Select E:\ and click OK.
- 7) Only committed data gets exported back to the handheld. Therefore, Commit the data on the Download screen and then follow steps 3 and 4 to Export the most recent data back to the handheld.

Sync Manually with Terminal Services / Citrix

This is an overview of syncing data with the handheld manually. ActiveSync/WMDC running Terminal Services/Citrix can't sync with a remotely connected handheld. This assumes you already have a data file on the device and will begin by importing it. (Otherwise, start by exporting the data, later in the overview.)

TTS User Manual

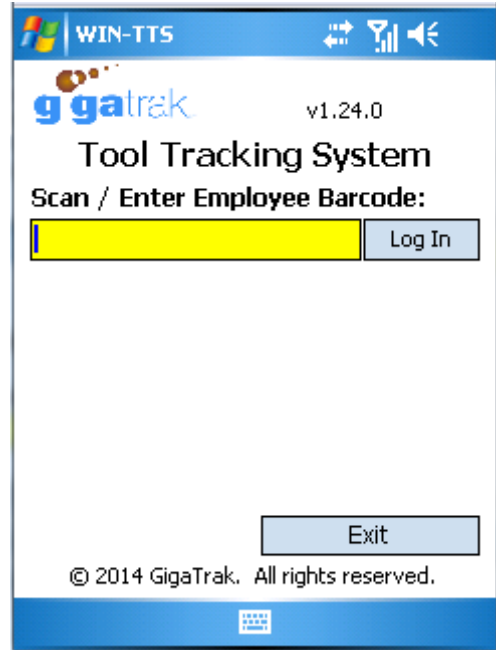
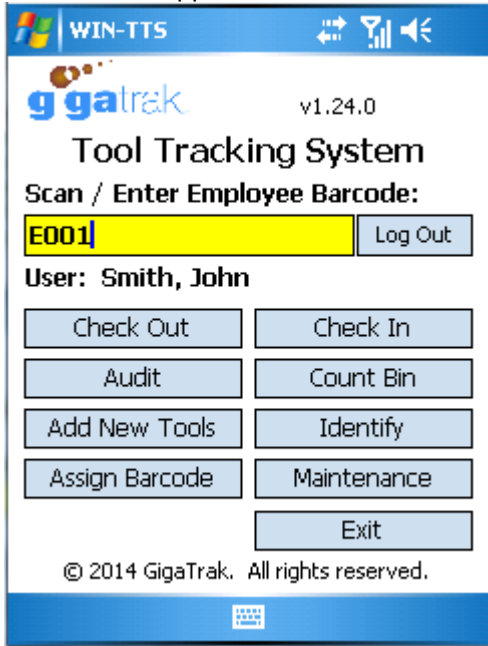
1. Close the TTS software on the handheld. From a PC with a locally connected handheld via ActiveSync/WMDC (these instructions assume ActiveSync but WMDC works similiarly):
 1. Double-click the ActiveSync icon in the system tray. Click Explore. Navigate to the path containing the TTS database file, tts_mob.sdf, (on an LXE, this is \System. On a Memor, this is \Backup. On a Honeywell, this is \Honeywell.)
 2. Open a second window that points to a folder that can be accessed via the terminal server session (i.e. a file server share, local C: drive, etc.)
 3. Drag the tts_mob.sdf file from the handheld window to the other window to copy the file.
2. Run the TTS software from the terminal server session. Click Download, then Import Data File Manually. Point at the folder where the file was copied to. Import the data, and commit as usual.
3. After committing, the new data must be exported back to the handheld. Click Export Data File Manually, select the same folder that was used for import, overwriting the file.
4. Essentially, reverse the copy procedure used for import. Switch back to the local PC, and:
 1. Double-click the ActiveSync icon in the system tray. Click Explore. Navigate to the path containing the TTS database file, tts_mob.sdf, (on an LXE, this is \System. On a Memor, this is \Backup.)
 2. Open a second window that points to a folder that can be accessed via the terminal server session (i.e. a file server share, local C: drive, etc.)
 3. Drag the tts_mob.sdf file from the server-accessible window to the handheld window to copy the file.

TTS Handheld Application Functions

The following describes basic operation of the Mobile Tool Tracking application.

Handheld Application Login

When the handheld application is first started, a user login will be required. Scan an employee barcode, or type in an employee barcode and press the Enter key. If the barcode matches an employee in the data file, the employee name will appear under the scan box, and buttons for the application functions will appear.



The user barcode is tied to the records recorded by the handheld. If a different employee uses the handheld, he/she should enter their barcode before recording records.

Wireless Application Login

When starting the wireless handheld application for the first time, you will be prompted to enter the server name in Admin. Select the Admin button to display the Admin screen. You will be prompted to enter a password when you select this function. The password is **gigatools**. If you are entering the password on the handheld keypad, be sure you are in alpha mode.

Wireless Application Admin

Display the on-screen keyboard and enter the SQL Server Name or IP Address, the database name (typically win_tts), the DB User ID (typically tts_user) and the database password.

Select the Save button when finished. A message will be displayed to indicate that the settings have been saved. Select the Back to Menu button. Scan or enter your employee barcode to log into the application. The main menu buttons will be displayed as shown above.



Check Out

The Check Out function is used to assign tools to employees, locations or containers.

Scan the barcode of the employee/location/container that is receiving the tools. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box.

If a Due Date is desired, check the Due Date checkbox. No due date will be recorded if the checkbox is not checked. A popup calendar can be displayed by selecting the drop-down arrow, or enter the number of days the employee will have the tool.

Scan the tool barcode. If the barcode matches a record in the data file, the tool description will be displayed under the scan box. If the tool is not a binned item, the check out record is saved. If the tool is a binned item, the Qty box will appear, with a default quantity of one. Enter the appropriate quantity and press the Enter key to save the check out record.

Continue to scan the tool barcodes that will be assigned to the employee/location/container.

The Reset button will clear data from the screen without saving it. It will not reset data that has already been saved.

Check In

The Check In function is used to return tools from an employee/location/container back to a storage location.

The user can change the Tool Status from a drop-down list at the time of check in. The options are No (change), Lost, or Broken.

Scan the tool barcode being returned. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box. The current storage location will be displayed. If the tool is being returned to this location, just press the Enter key. If it is being returned to a different storage location, scan the barcode of the new storage location.

If the tool is not a binned item, the check in record is saved. If the tool is a binned item, the Qty box will appear, with a default quantity of one. Enter the appropriate quantity and press the Enter key to save the check in record.

If the tool is set up for Miles and/or Hours in the host database, the Miles and/or Hours boxes will appear, with the current readings filled in. Enter the appropriate values and press the Enter key to save the check in record.

Continue to scan the tool barcodes that will be checked in from the employee/location/container.

Note: consumable items cannot be checked in. Scanning the barcode of a consumable item will display the message “Cannot Check In a Consumable”.

The Reset button will clear data from the screen without saving it. It will not reset data that has already been saved.

Audit

The Audit function is used to verify tools that have been checked out to an employee/location/container.

Scan the barcode of the employee/location/container that is being audited. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box, and a list of the tools that are currently assigned to that barcode will appear in the listbox.

Note: binned tools are not audited, and will not be displayed.

If you audit a container, scan the barcodes of the tools in the container. If the scanned barcode matches one of the barcodes in the list, that item will be removed from the list. Continue to scan the tool barcodes, including barcodes that do not appear in the list. When all tools have been scanned, there may be some items still on the list. Those items can be reconciled when the data is downloaded back to the host PC.

The Reset button will clear data from the screen. Tools that were audited will have been saved.

Audit

Employee/Location/Container:
J003
O'Hare Terminal 2 Construction

Tool Barcode:
[Yellow Input Field]

T00022 ~ Burndy 18V Hydraulic Self-Container

1 data records

<- Back to Menu Reset

Count Bin

Tool Barcode:
T00500
T00500 - Leather Surfaced Work
Gloves
Last Loc/Emp: Shelf 100

Quantity:
14

1 data records

<- Back to Menu Reset

Count Bin

The Count Bin function is used to count the number of binned items in a storage location.

Scan the tool barcode. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box. If the barcode does not match a bin item, the message “Not a binned item” is displayed.

Enter the number of binned items counted for that barcode in the Qty box and press the enter key to save the record.

The Reset button will clear data from the screen without saving it. It will not reset data that has already been saved.

Identify

The Identify function is used to display the description of a tool when the barcode is scanned. It will also show the last known location or employee that has it. This is only a lookup function, it does not save data.

The screenshot shows the 'Identify' screen with the following information:

- Tool Barcode:** T00001
- Description:** T00001 - Milwaukee 1/2in Magnum Drill 0-2800RPM
- Last Loc/Emp:** Doe, Mary
- Navigation:** '<- Back to Menu' button and '1 data records' indicator.

Add New Tools

The Add New Tools function is used to add tools that have not been added to the host PC database. You will be prompted to enter a password when you select this function. The password is **gigatools**. If you are entering the password on the handheld keypad, be sure you are in alpha mode.

The screenshot shows the 'Add New Tools' screen with the following information:

- Current Emp/Loc/Container:** E003
- Employee:** Barnaby, Mike
- Master Number:** PAT750-LI
- Tool Description:** Burndy Patriot 18 Volt Hydraulic Self-
- New Tool BC:** T00249
- Asset #:** BC5464
- Serial #:** 6546-464
- In Service Date:** 11/04/2014
- Storage Loc BC:** L003
- Navigation:** '<- Back to Menu' and 'Reset' buttons.

After entering the password, a warning message will be displayed indicating that the new tool will not be available for use until the data is downloaded and committed back to the host PC application.

A Master (or Catalog) Number for the new tool must exist in the host PC database. You will also need to assign a new tool barcode to the tool to save the record.

Note that you cannot add new binned items with this function.

Scan or enter your employee barcode. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box.

Enter a Master Number (or scan a Master Barcode). If the barcode matches a record in the data file, the appropriate tool description will be displayed under the scan box.

Scan or enter a new tool barcode. If an existing tool barcode is entered, a message will appear stating that the tool BC already exists, and ask if you want to check out the tool

instead. Responding "Yes" to the prompt will check out the tool to the employee/location/container shown on the screen.

Asset # and Serial # are optional fields, which can be left blank. When the focus is on the Serial # field, press the Enter key to save the record. A message will appear at the bottom of the screen to indicate that the new tool barcode was added successfully.

The Reset button will clear data from the screen without saving it. It will not reset data that has already been saved.

Assign Barcode (Batch application only)

The Assign Barcode function is used to assign barcodes to existing tools in the database. You will be prompted to enter a password when you select this function. The password is **gigatools**. If you are entering the password on the handheld keypad, be sure you are in alpha mode.

After entering the password, a warning message will be displayed indicating that the new tool will not be available for use until the data is downloaded and committed back to the host PC application.

A second warning message will be displayed indicating that if there is more than one batch handheld, changing a tool barcode may result in data loss. Download and commit data from the other handhelds before committing the barcode change.

Scan the existing tool barcode, asset number, or serial number. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box

Enter a new barcode. If the new barcode is unique, the data will be saved. If it is not unique, a message will be displayed prompting you to enter a unique barcode.

The Reset button will clear data from the screen without saving it. It will not reset data that has already been saved.

Assign Barcode

Barcode / Asset # / Serial #:
T00001

New Barcode:
T00147

<- Back to Menu Reset

Maintenance

Maintenance Menu

Send To Maintenance

Return From Maintenance

<- Back

The Maintenance Function allows users to either select a tool to Send to Maintenance, or record a tool that has been Return(ed) From Maintenance.

When sending a tool for maintenance the user must scan the tool barcode, select the repair type, pick a provider, and enter any notes they prefer. The record is then saved and the status set to Out for Maintenance once downloaded.

Send To Maintenance

Tool Barcode: T00001

T00001 - Milwaukee 1/2in Magnum

Repair Type: Safety Inspection

Special Instructions:
Inspect to ensure the drill is operating properly and safely.

Provider: Milwaukee Tools

Note:
Check the electrical cord for fraying.

<- Back to Menu Reset

TTS User Manual

Return From Maintenance

Tool Barcode:
T00001 - Milwaukee 1/2in Magnum

Repair Type: ▼

Handheld maint. - Please check the Note:

Note:

Tool Status: ▼

Repair Cost:

The Return From Maintenance allow the user to scan in items previously sent for maintenance and record the maintenance results and the cost of the maintenance. This is then added to the Maintenance History for the specific tool upon download to the database.

Download Data Back to the Host Application

When you have finished collecting data, the batch handheld must be downloaded back to the host PC application.

- 1) Start the Tool Tracking application on the host computer and select the Download button.
- 2) If your handheld device is not displayed on the screen title bar, click the Select Handheld button and select it.
- 3) Put the handheld in the dock and wait for it to sync with the PC.
- 4) Select the Sync Data Automatically button to begin the data transfer. Do not remove the handheld from the dock until the data transfer is complete.

Download

Select Handheld Handheld Device: Honeywell Dolphin 6100 Data Dir: \Honeywell

Display Type: All Audit Out In Count New Edit

Yellow Checkbox: Committed item
 Blue Text: Reserved (High Priority) for a different Emp / Location
 Red Text: Audit Emp / Location / Cont does not match expected Emp / Location / Cont, or Qty mismatch

Chk	Type	Current Emp / Location / Cont	Tool	Scan Date	Last Known Emp / Location / Cont / Qty	Qty	Status Change	Scanned By
<input checked="" type="checkbox"/>	Audit	O'Hare Terminal 2 Construction (Jobs)	T00020 - Burndy Patriot 18 Volt Hydraulic Self-Contained 14-Ton Crimping Tool	11/3/2014 03:27:04 PM	O'Hare Terminal 2 Construction (Jobs)			Smith, John
<input checked="" type="checkbox"/>	Audit	O'Hare Terminal 2 Construction (Jobs)	T00035 - Dell XT Laptop	11/3/2014 03:27:07 PM	O'Hare Terminal 2 Construction (Jobs)			Smith, John
<input checked="" type="checkbox"/>	Out	Barnaby, Mike	T00001 - Milwaukee 1/2in Magnum Drill 0-2800RPM	11/3/2014 01:13:29 PM	Shelf 101 (ACME Warehouse 2)			Smith, John
<input checked="" type="checkbox"/>	Out	Barnaby, Mike	T00003 - Milwaukee 10 amp Sawzall Corded	11/3/2014 01:13:34 PM	Shelf 101 (ACME Warehouse 2)			Smith, John
<input checked="" type="checkbox"/>	Out	Barnaby, Mike	T00008 - Hammer - Framing	11/3/2014 01:13:54 PM	Aisle 1 (ACME Central Warehouse)	1		Smith, John
<input checked="" type="checkbox"/>	Out	Barnaby, Mike	T00009 - MILWAUKEE 7-1-4 LEFT BLADE CIRCULAR SAW	11/3/2014 01:14:22 PM	Shelf 100 (ACME Central Warehouse)			Smith, John
<input checked="" type="checkbox"/>	Out	Barnaby, Mike	T00011 - M18™ Cordless LITHIUM-ION 3/4" SDS Plus Rotary Hammer Kit	11/3/2014 01:14:24 PM	Large Rolling Tool Box			Smith, John
<input checked="" type="checkbox"/>	Audit	Barnaby, Mike	T00001 - Milwaukee 1/2in Magnum Drill 0-2800RPM	11/3/2014 02:22:48 PM	Barnaby, Mike			Smith, John
<input checked="" type="checkbox"/>	Audit	Barnaby, Mike	T00003 - Milwaukee 10 amp Sawzall Corded	11/3/2014 02:22:50 PM	Barnaby, Mike			Smith, John
<input type="checkbox"/>	Audit	Barnaby, Mike	T00009 - MILWAUKEE 7-1-4 LEFT BLADE CIRCULAR SAW	11/3/2014 02:22:53 PM	O'Hare Terminal 2 Construction (Jobs)			Smith, John
<input type="checkbox"/>	Audit	Barnaby, Mike	T00011 - M18™ Cordless LITHIUM-ION 3/4" SDS	11/3/2014 02:22:55 PM	O'Hare Terminal 2			Smith, John

13 rows found

TTS User Manual

The data collected on the handheld will be displayed on the screen. At this point, none of the tool data has been changed in the host database. Click the Commit button to commit the data to the host database. *Only the rows that are checked in the first column will be committed.* The user can check or uncheck the checkboxes as appropriate. This will prevent bad data from being committed to the database.

Some data can be modified before using the Commit function. For a count record, the Qty counted can be changed by double-clicking the Qty. For a check in record, the Status can be changed by double-clicking the Status Change column and selecting from the dropdown list. Be sure to check the checkbox in the first column if you want the data to be changed.

After the Commit function has been performed, it changes data in the host database. The background of the checkbox will turn yellow for committed items. All handhelds should be synced with the host to update the data on the handhelds.

Support

GigaTrak provides 90-days of telephone support for TTS 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 9am 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 Option 2 with any questions.

Software License Agreement

GigaTrak, an Illinois corporation ("GigaTrak"), grants to you ("Licensee") a non-exclusive, non-transferable (except as otherwise specifically provided herein), perpetual license to use the Software (as herein defined) solely for Licensee's internal use, limited to only one PC owned by Licensee (unless otherwise agreed upon in writing by GigaTrak). The Software consists of GigaTrak's proprietary standard software modules and tools, known as Tool Tracking System (TTS), and includes all tangible and intangible portions thereof, including without limitation machine readable object code, user manual and other documentation, the look and feel of the software operation, and ideas and concepts contained therein (herein collectively referred to as the "Software").

Neither this License Agreement nor any of the rights or obligations contained herein shall be assigned, subleased or otherwise transferred, whether voluntarily, involuntarily, in bankruptcy, by operation of law or otherwise, by Licensee without the written consent of GigaTrak, which consent shall not unreasonably be withheld, except to an entity controlled by, controlling or under common control with Licensee or to any purchaser of or successor to all or substantially all of Licensee's business; and any attempted assignment, sublicense or transfer to the contrary shall be null and void and of no effect. All portions of the Software constitute confidential proprietary information and trade secrets belonging or licensed to GigaTrak. Licensee shall treat all portions of the Software as confidential and shall not in any manner disclose or make available all or any portion of the Software to any third party. Licensee shall not copy any portion of the Software, whether on computer media, hard copy, or otherwise, except as may actually be necessary for back-up or archival purposes for Licensee's use of the Software. Licensee shall not remove any copyright notices included in the Software and shall reproduce the notices on any copy Licensee may make of any portion of the Software and on the Software transfer and storage media. Licensee will not, and will not permit others to, decompile, disassemble or reverse engineer any portion of the Software. Licensee may be liable to GigaTrak for up to ten times the current license fee (or as limited by state or local laws) of the Software for each occurrence of unlicensed usage that violates this License Agreement. This does not preclude potential liability for copyright infringement and other legal claims.

Limitations on Warranty and Liability

GigaTrak warrants to Licensee that for a period of ninety (90) days from and after shipment of the Software to Licensee, or such longer term as stated on the Cover Page hereof and paid for by Licensee (the "Warranty Period"), all media on which delivered copies of the Software is recorded will be free from defects in materials and workmanship. GigaTrak's sole and exclusive obligation under this warranty, and Licensee's sole and exclusive remedy therefore, shall be, at GigaTrak's option and free of charge to Licensee, to repair or replace any item of computer media returned to it by Licensee within the Warranty Period that GigaTrak reasonably determines to be defective in breach of the foregoing warranty. This warranty does not cover misuse, abuse, neglect, damage incurred during shipping or storage, or any modifications by anyone other than an authorized representative of GigaTrak.

Except as expressly provided herein, GIGATRAK MAKES NO EXPRESS OR IMPLIED REPRESENTATIONS OR WARRANTIES OF ANY KIND OR NATURE WHATSOEVER WITH RESPECT TO THE SOFTWARE, THE USE OF THE SOFTWARE OR ANY MATTER RELATING THERETO, AND ALL OTHER WARRANTIES, INCLUDING SPECIFICALLY BUT WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, ARE HEREBY DISCLAIMED. Licensee acknowledges that the Software may not satisfy all of Licensee's requirements and its operation may not be uninterrupted or error free, and that GigaTrak disclaims any warranties with respect thereto. Licensee further acknowledges having investigated the Software to its satisfaction and has determined to its own satisfaction that the Software as described in the associated documentation is suitable for its purposes, and that the correctness and usability of the output of the Software is Licensee's sole responsibility.

GigaTrak's sole and exclusive aggregate monetary liability to Licensee for any matter arising out of this License Agreement, the Software, or the use of the Software in any manner, whether in contract, tort (including negligence) or otherwise, and regardless of the nature of the claim or form of action relating

TTS User Manual

thereto, shall be in no event more than the license fee paid by Licensee hereunder. Notwithstanding the foregoing, GigaTrak shall not be liable to Licensee for damages for injury, including death, to any person or for any claims of any kind by a third party.

IN NO EVENT SHALL GIGATRAK BE LIABLE FOR ANY SPECIAL, INCIDENTAL, CONSEQUENTIAL OR PUNITIVE DAMAGES OF ANY KIND, WHETHER FORESEEN OR FORESEEABLE (INCLUDING WITHOUT LIMITATION FOR ANY LOSS OF BUSINESS OR PROFITS), EVEN IF GIGATRAK WAS AWARE OF THE POSSIBILITY OF SUCH DAMAGES, AND REGARDLESS OF WHETHER SUCH CLAIM IS BASED UPON THEORIES OF CONTRACT OR TORT (INCLUDING STRICT LIABILITY).

The Software and included documentation is subject to change. GigaTrak reserves the right to update, modify and enhance the Software and documentation without notice.

Installation of the enclosed Software constitutes agreement with these terms and conditions.

© Copyright 2010 by GigaTrak.

Appendix A Honeywell 6100 Handheld Information

Remove any protective film that may be covering the laser scan window.

Touchscreen Calibration

If the touchscreen is not responding properly to stylus touch taps, the touchscreen may need to be recalibrated.

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select “Settings”, then “Control Panel”.
- 3) Scroll the window if necessary and double tap the “Stylus” icon.
- 4) Select the “Calibration” tab.
- 5) Tap the “Recalibrate” button and follow the instructions on the screen.



Set Date/Time/Time Zone

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select “Settings”, then “Control Panel”.
- 3) Scroll the window if necessary and double tap the Date/Time icon.
- 4) Set the current date, time, and time zone.
- 5) Tap the Apply button and close the screen.

Set Time Separator

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Time” tab.
- 4) If the “Time Separator” is not the colon “:” character, select the Time Separator box.
- 5) Select the “:” character from the drop-down list (or type it in using the on-screen keyboard).
- 6) Tap the “OK” button at the top of the screen.

Set Short Date Format

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Date” tab.
- 4) Set the Short Date Style to “MM/dd/yyyy”.
- 5) If the “Date Separator” is not the “/” character, select the Date Separator box.
- 6) Select the “/” character from the drop-down list (or type it in using the on-screen keyboard).
- 7) Tap the “OK” button at the top of the screen.

Turn on ScanWedge

If the laser does not turn on when the **Scan** button is pressed, turn on ScanWedge:

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Tap “Programs”, then “Power Tools”
- 3) Tap the “ScanWedge” icon. A barcode icon will appear in the System Tray after ScanWedge is turned on.

Append Carriage Return to Barcode scan

If the screen cursor does not advance to the next data field in your application after scanning a barcode, you need to append a carriage return to the barcode scan.

- 1) On the desktop, open "My Device".
- 2) Open the "Honeywell" folder.
- 3) Scroll the window to find the EXM icon that is labeled "scanwedge". Double tap the icon.
- 4) In the split window, select "Settings" in the upper window.
- 5) Scroll the lower window and select "SuffixKeys".
- 6) Select "Edit" on the menu bar, then select "Modify".
- 7) In the "Value" box, enter 13 and close the screen.
- 8) When the screen returns to the split window, be sure the SuffixKeys checkbox is checked.
- 9) Close the screen and respond "Yes" to the Save Changes message.

Microsoft Active Sync Installation (For Windows XP)

- 1) Locate a copy of the latest version of Active Sync for your computer system. The correct version is available from Microsoft's WEB site or a copy is included on your CD. Version 4.5 is the latest from Microsoft as of this printing.
- 2) Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.
- 3) Leave Active Sync running to install and connect your handheld computer.

NOTE: Some users may use a single PC to connect multiple handheld computers. If this is the case, it is best to setup your PC to recognize each handheld as a "Guest". This avoids having Active Sync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided "GuestOnly.reg" file. It will instantly update your system for future connections.

Windows Mobile Device Center Installation (For Windows Vista or Windows 7)

- 1) Locate a copy of the latest version of Windows Mobile Device Center for your computer system. The correct version is available from Microsoft's WEB site or a copy is included on your CD.
- 2) Look for the installation file (i.e. drvupdate-x86.exe) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.

Install GigaTrak Handheld Application

The handheld application can be found in the PocketPC folder of your installation CD.

- 1) Connect the handheld docking station to your computer (typically a USB connection) and plug in the AC power cable.
- 2) Put the handheld in the dock and wait for it to sync with the PC.
- 3) On the PC, double-click the handheld setup file for the application you are installing (e.g., setup_honeywell_hh.exe).

Add a Shortcut to your Handheld Desktop

- 1) Exit the application if it is running.
- 2) Double tap the 'My Device' icon on the desktop.
- 3) Double tap the 'Honeywell' icon.
- 4) Scroll down to the GigaTrak application icon (e.g., WIN-ATS).
- 5) Hold your stylus down on the icon until a pop-up menu appears.
- 6) Select 'Copy' on the menu.
- 7) Close the window to go back to the desktop.
- 8) Hold down the stylus on the desktop until a pop-up menu appears.
- 9) Select 'Paste Shortcut' from the menu.

If the handheld does not respond properly, it may need a reboot. Perform a warm boot first and see if that fixes the problem. If it does not, then perform a cold boot.

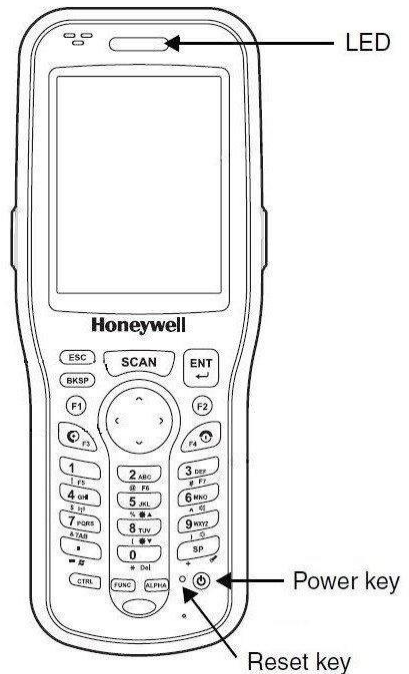
Warm Boot the Handheld

Press the **Reset** key. The screen will turn white, and the decode/scan LED flashes blue for approximately three seconds.

Cold Boot the Handheld

Hold down the **Reset** key and then press and release the **Power** key. The screen will turn white, and the decode/scan LED flashes red for approximately three seconds.

Set the date and time after each cold boot to ensure that the system clock is accurate.



Appendix B LXE Handheld Information

Remove any protective film that may be covering the laser scan window.

Touchscreen Calibration

If the touchscreen is not responding properly to stylus touch taps, the touchscreen may need to be recalibrated.

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select Settings, then Control Panel.
- 3) Scroll the window if necessary and double tap the Stylus icon.
- 4) Select the “Calibration” tab.
- 5) Tap the “Recalibrate” button and follow the instructions on the screen.

Set Date/Time/Time Zone

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select Settings, then Control Panel.
- 3) Scroll the window if necessary and double tap the Date/Time icon.
- 4) Set the current date, time, and time zone.
- 5) Tap the Apply button and close the screen.

Set Time Separator

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Time” tab.
- 4) If the “Time Separator” is not the colon “:” character, select the Time Separator box.
- 5) Select the “:” character from the drop-down list (or type it in using the on-screen keyboard).
- 6) Tap the “OK” button at the top of the screen.

Set Short Date Format

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Date” tab.
- 4) Set the Short Date Style to “MM/dd/yyyy”.
- 5) If the “Date Separator” is not the “/” character, select the Date Separator box.
- 6) Select the “/” character from the drop-down list (or type it in using the on-screen keyboard).
- 7) Tap the “OK” button at the top of the screen.

Append Carriage Return to Barcode scan

- 1) In Control Panel, open Data Collection
- 2) Go to 'Data Options' tab.
- 3) Click 'Symbology Settings' button.
- 4) In 'Add' box:
 - a) Check 'Suffix' checkbox.
 - b) Use on-screen keyboard to enter ^M (drag the keyboard out of the way with the stylus if needed).
 - c) Click OK button.



Microsoft Active Sync Installation (For Windows XP)

- 1) Locate a copy of the latest version of Active Sync for your computer system. The correct version is available from Microsoft's WEB site or a copy is included on your CD. Version 4.5 is the latest from Microsoft as of this printing.
- 2) Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install. Leave Active Sync running to install and connect your handheld computer.

NOTE: Some users may use a single PC to connect multiple handheld computers. If this is the case, it is best to setup your PC to recognize each handheld as a "Guest". This avoids having Active Sync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided "GuestOnly.reg" file. It will instantly update your system for future connections.

Windows Mobile Device Center Installation (For Windows Vista or Windows 7)

- 1) Locate a copy of the latest version of Windows Mobile Device Center for your computer system. The correct version is available from Microsoft's WEB site or a copy is included on your CD.
- 2) Look for the installation file (i.e. drvupdate-x86.exe) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.

Install GigaTrak Handheld Application

The handheld application can be found in the PocketPC folder of your installation CD.

- 1) Connect the handheld docking station to your computer (typically a USB connection) and plug in the AC power cable.
- 2) Put the handheld in the dock and wait for it to sync with the PC.
- 3) On the PC, double-click the handheld setup file for the application you are installing (e.g., setup_LXE_hh.exe).

Add a Shortcut to your Handheld Desktop

- 1) Exit the application if it is running.
- 2) Double tap the 'My Device' icon on the desktop.
- 3) Double tap the 'System' icon.
- 4) Scroll down to the GigaTrak application icon (e.g., WIN-ATS).
- 5) Hold your stylus down on the icon until a pop-up menu appears.
- 6) Select 'Copy' on the menu.
- 7) Close the window to go back to the desktop.
- 8) Hold down the stylus on the desktop until a pop-up menu appears.
- 9) Select 'Paste Shortcut' from the menu.

If the handheld does not respond properly, it may need a reboot. Perform a warm boot first and see if that fixes the problem. If it does not, then perform a cold boot.

Warm Boot the Handheld

Hold down the **Power** key and then the **Enter** key until the screen blanks. Release the keys.

Cold Boot the Handheld

Hold down the **Blue** key, the **Scan** key, and the **Power** key until the screen blanks. Release the keys.



Appendix C Memor Handheld Information

Remove any protective film that may be covering the laser scan window.

Touchscreen Calibration

If the touchscreen is not responding properly to stylus touch taps, the touchscreen may need to be recalibrated.

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select Settings, then Control Panel.
- 3) Scroll the window if necessary and double tap the Stylus icon.
- 4) Select the “Calibration” tab.
- 5) Tap the “Recalibrate” button and follow the instructions on the screen.

Set Date/Time/Time Zone

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select Settings, then Control Panel.
- 3) Scroll the window if necessary and double tap the Date/Time icon.
- 4) Set the current date, time, and time zone.
- 5) Tap the Apply button and close the screen.

Set Time Separator

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Time” tab.
- 4) Set the Time Style to “h:mm:ss tt”.
- 5) If the “Time Separator” is not the colon “:” character, select the Time Separator box.
- 6) Select the “:” character from the drop-down list (or type it in using the on-screen keyboard).
- 7) Tap the “OK” button at the top of the screen.

Set Short Date Format

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Date” tab.
- 4) Set the Short Date Style to “MM/dd/yyyy”.
- 5) If the “Date Separator” is not the “/” character, select the Date Separator box.
- 6) Select the “/” character from the drop-down list (or type it in using the on-screen keyboard).
- 7) Tap the “OK” button at the top of the screen.



Append Carriage Return to Barcode scan

- 1) Tap the gray barcode icon in the system tray.
- 2) Tap on Configure.
- 3) Double tap on Reader Parameters.
- 4) Double tap on Decoding, if shown.
- 5) Double tap on Text Formatting.
- 6) Double tap on Postamble.
- 7) Select CR from the dropdown list.
- 8) Tap the + button.
- 9) Tap the OK button.
- 10) Tap the File menu, then Save.
- 11) Tap OK.
- 12) Tap the File menu, then Exit.
- 13) Tap the gray barcode icon in the system tray again.
- 14) Tap on Wedge. The barcode icon in the system tray will turn green.

Microsoft Active Sync Installation (For Windows XP)

- 1) Locate a copy of the latest version of Active Sync for your computer system. The correct version is available from Microsoft's WEB site or a copy is included on your CD. Version 4.5 is the latest from Microsoft as of this printing.
- 2) Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.
- 3) Leave Active Sync running to install and connect your handheld computer.

NOTE: Some users may use a single PC to connect multiple handheld computers. If this is the case, it is best to setup your PC to recognize each handheld as a "Guest". This avoids having Active Sync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided "GuestOnly.reg" file. It will instantly update your system for future connections.

Windows Mobile Device Center Installation (For Windows Vista or Windows 7)

- 1) Locate a copy of the latest version of Windows Mobile Device Center for your computer system. The correct version is available from Microsoft's WEB site or a copy is included on your CD.
- 2) Look for the installation file (i.e. drvupdate-x86.exe) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.

Install USB driver

BEFORE connecting the handheld computer to a host USB port for the first time, you must install the USB driver provided with the handheld computer on your PC. This will likely be include on a CD-ROM or downloaded from the WEB. Complete the driver installation as instructed during the installation procedure. (NOTE: Some handheld models may not require a driver to be loaded. Refer to the installation instructions.)

Connect the USB cable to your PC and the handheld or docking station (if provided). Windows will locate the hardware and complete the installation.

Install GigaTrak Handheld Application

The handheld application can be found in the PocketPC folder of your installation CD.

- 1) Connect the handheld docking station to your computer (typically a USB connection) and plug in the AC power cable.
- 2) Put the handheld in the dock and wait for it to sync with the PC.
- 3) On the PC, double-click the handheld setup file for the application you are installing (e.g., setup_memor_hh.exe).

Add a Shortcut to your Handheld Desktop

- 1) Exit the application if it is running.
- 2) Double tap the 'My Device' icon on the desktop.
- 3) Double tap the 'BACKUP' icon.
- 4) Scroll down to the GigaTrak application icon (e.g., WIN-ATS).
- 5) Hold your stylus down on the icon until a pop-up menu appears.
- 6) Select 'Copy' on the menu.
- 7) Close the window to go back to the desktop.
- 8) Hold down the stylus on the desktop until a pop-up menu appears.
- 9) Select 'Paste Shortcut' from the menu.

If the handheld does not respond properly, it may need a reboot. Perform a warm boot first and see if that fixes the problem. If it does not, then perform a cold boot.

Warm Boot the Handheld

Press the **ESC** key and the **Power** key simultaneously.

Cold Boot the Handheld

Press the **ESC** key, the **joystick** and the **Power** key simultaneously.



Appendix D Skorpio X3 Handheld Information

This configuration guide assumes that the Skorpio X3 is using Windows CE 6.0. Similar settings are needed for any Windows Mobile or Embedded Operating Systems but the settings may be located in other configuration options. Remove any protective film that may be covering the barcode scan window.

NOTE: THESE SETTINGS ARE CRITICAL FOR PROPER OPERATION. DO NOT SKIP ANY SETTING.



Touchscreen Calibration

If the touchscreen is not responding properly to stylus touch taps, the touchscreen may need to be recalibrated.

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select Settings, then Control Panel.
- 3) Scroll the window if necessary and double tap the Stylus icon.
- 4) Select the “Calibration” tab.
- 5) Tap the “Recalibrate” button and follow the instructions on the screen.

Set Date/Time/Time Zone

- 1) Tap the Start button in the lower left corner of the system tray.
- 2) Select Settings, then Control Panel.
- 3) Scroll the window if necessary and double tap the Date/Time icon.
- 4) Set the current date, time, and time zone.
- 5) Tap the Apply button and close the screen.

Set Time Separator

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Time” tab.
- 4) Set the Time Style to “h:mm:ss tt”
- 5) If the “Time Separator” is not the colon “:” character, select the Time Separator box.
- 6) Select the “:” character from the drop-down list (or type it in using the on-screen keyboard).
- 7) Tap the “OK” button at the top of the screen.

Set Short Date Format

- 1) In Control Panel, select Regional Settings.
- 2) Tap the Customize button.
- 3) Select the “Date” tab.
- 4) Set the Short Date Style to “MM/dd/yyyy”.
- 5) If the “Date Separator” is not the “/” character, select the Date Separator box.
- 6) Select the “/” character from the drop-down list (or type it in using the on-screen keyboard).
- 7) Tap the “OK” button at the top of the screen.

Append ONLY the Carriage Return to Barcode scan

The default setting of the Skorpio X3 includes BOTH the Carriage Return [CR] and a Line Feed [LF]. The [LF] will interfere with proper scanning output. You must remove the [LF] following the steps below.

- 1) In Control Panel, select Encoding.
- 2) Tap Configure on the Menu and select Encoding Options.
- 3) Using the Right Arrow on the Menu, tap the Arrow until the Formatting page is displayed.
- 4) Select the Label Suffix radio button (NOT Prefix).
- 5) In the Edit Label Suffix window should be displayed [CR][LF].
- 6) Tap the window after the last character [LF] and press the BKSP (backspace) key to delete the [LF] only. The [CR] should be the only remaining Suffix. If there is no Suffix shown, select [CR] from the Add special dropdown listing and press Add.

- 7) Once only the Label Suffix [CR] is displayed, select “OK” at the top of the screen.

Microsoft Active Sync Installation (For Windows XP)

- 1) Locate a copy of the latest version of Active Sync for your computer system. The correct version is available from Microsoft’s WEB site or a copy is included on your CD. Version 4.5 is the latest from Microsoft as of this printing.
- 2) Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.
- 3) Leave Active Sync running to install and connect your handheld computer.

NOTE: Some users may use a single PC to connect multiple handheld computers. If this is the case, it is best to setup your PC to recognize each handheld as a “Guest”. This avoids having Active Sync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided “GuestOnly.reg” file. It will instantly update your system for future connections.

Windows Mobile Device Center Installation (For Windows Vista or Windows 7)

- 1) Locate a copy of the latest version of Windows Mobile Device Center for your computer system. The correct version is available from Microsoft’s WEB site or a copy is included on your download.
- 2) Look for the installation file (i.e. drvupdate-x86.exe) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.
- 3) Select the “Connect without setting up your device” option. DO NOT setup your device to sync your contacts, pictures, etc. since this will limit the amount of memory available in the Skorpion X3.

Connect the USB cable to your PC and the handheld or docking station (if provided). Windows will locate the hardware and complete the installation.

Install GigaTrak Handheld Application

The handheld application can be found in the Handheld folder of your installation files.

- 1) Connect the handheld docking station to your computer (typically a USB connection) and plug in the AC power cable.
- 2) Put the handheld in the dock and wait for it to sync with the PC.
- 3) On the PC, double-click the handheld setup file for the application you are installing (e.g., setup_skorpion_hh.exe). The application will be installed in the “FlashDisk” on the Skorpion.

Add a Shortcut to your Handheld Desktop

The shortcut should be installed already in your Start/Programs listing. If not, you can perform the following.

- 1) Exit the application if it is running.
- 2) Double tap the 'My Device' icon on the desktop.
- 3) Double tap the “FlashDisk” icon.
- 4) Scroll down to the GigaTrak application icon (e.g., WIN-TTS).
- 5) Hold your stylus down on the icon until a pop-up menu appears.
- 6) Select 'Copy' on the menu.
- 7) Close the window to go back to the desktop.
- 8) Hold down the stylus on the desktop until a pop-up menu appears.
- 9) Select 'Paste Shortcut' from the menu.

Resetting the Skorpion X3

There are several reset methods for the Skorpion X3.

A warm boot terminates an unresponsive application and clears the working RAM, but preserves the file system. The Registry is restored from persistent memory if available or returned to factory default.

A cold boot forces all applications to close reinitializing completely the system. It clears the working RAM, but the file system is preserved. The Registry is restored from persistent memory.

Warm Boot the Handheld

To perform a Warm Boot press the **Yellow**, **Blue**, and the **ESC** keys simultaneously.



Cold Boot the Handheld

To perform a cold boot, do the following steps:

- 1) Turn off the Skorpio X3 by pressing the ON/OFF Power button.
- 2) Pull the battery latch down and remove the battery pack.
- 3) Simultaneously press the SCAN key and the Reset button in the battery compartment.
- 4) Insert the battery pack.
- 5) Turn on the Skorpio X3 by pressing the ON/OFF Power button.



1250 Touhy Avenue
Elk Grove Village, IL 60007
877-204-9237