

VERSION 4.20.1



**ATS USER MANUAL
STARTER EDITION**

ATS USER MANUAL- STARTER EDITION

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QUICK START OVERVIEW

Now that you have installed ATS, you are ready to begin using the system. This brief Quick Start Overview and the following User Manual provide the general information needed to begin entering data into the system and using ATS for the first time.

ASSET TYPES AND CLASSIFICATIONS

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

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. See Support → Condition Administration for additional information.

FUNDING SOURCE AND ACCOUNTS

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

FACILITIES

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

LOCATIONS

This function allows the user to create locations where assets are stored or to which assets are checked out. Locations can also be classified as “Storage” locations. Storage locations are typically where

materials are centrally located until checkout. On the menu bar select Support→ Location Administration. See Location Administration in the User Manual for a detailed explanation.

EMPLOYEES

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

PRINTER ASSIGNMENT

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

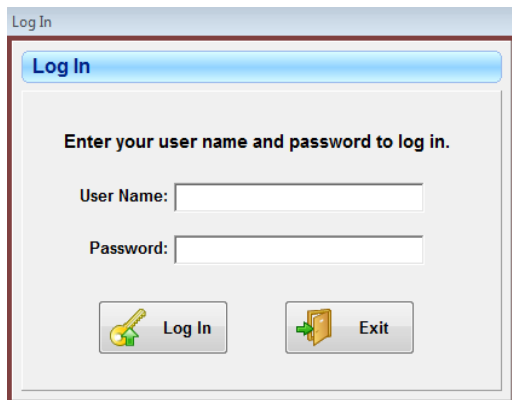
ASSETS

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

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

Backup your database daily!

GETTING STARTED



The Log In dialog box has a title bar with the text "Log In". Below the title bar is a blue header with the text "Log In". The main area contains the text "Enter your user name and password to log in." followed by two input fields: "User Name:" and "Password:". At the bottom, there are two buttons: "Log In" with a key icon and "Exit" with a door icon.

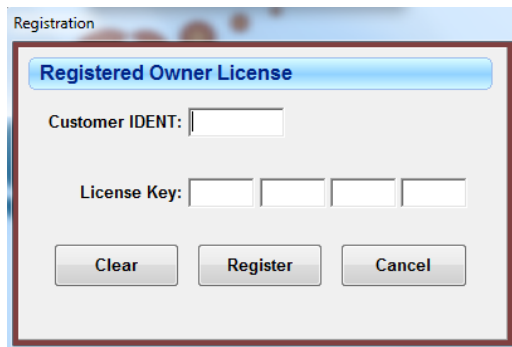
Upon opening the program, the screen at left will appear. You will be prompted to enter a User Name and Password. If it is the first time logging in, you will use the Admin User's data:

Username: ADMIN

Password: ADMINUSER

Other users may be added to the system after setup. After users are entered into the system, they should each log in under their own User Name and Password.

REGISTRATION



The Registered Owner License dialog box has a title bar with the text "Registration". Below the title bar is a blue header with the text "Registered Owner License". The main area contains the text "Customer IDENT:" followed by an input field. Below that is the text "License Key:" followed by four input fields. At the bottom, there are three buttons: "Clear", "Register", and "Cancel".

After logging in as Admin, click File on the menu and select Registration Form. This step is important because it assigns licensing rights to you. Entering the information will unlock the program for your licensed use.

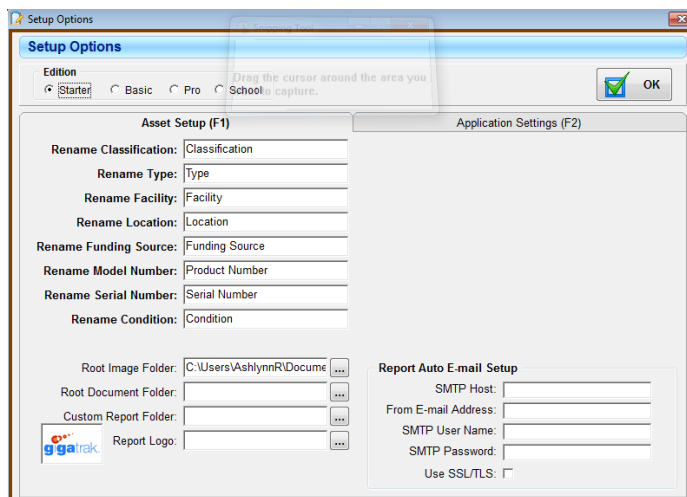
The Four Digit Customer Identifier and the 16 digit License Key will be provided by Gigatrak when the product is purchased.

SETUP OPTIONS

After registering your product, click File on the menu and select Setup Options. (Setup Options can only be accessed when logged in as Admin.)

ASSET SETUP

This option can be used to change the names of the parameters to fit your needs. This makes up the structure of the system.



The Setup Options dialog box has a title bar with the text "Setup Options". Below the title bar is a blue header with the text "Setup Options". The main area is divided into two panes: "Asset Setup (F1)" and "Application Settings (F2)". The "Asset Setup (F1)" pane contains several input fields for renaming parameters: "Rename Classification:", "Rename Type:", "Rename Facility:", "Rename Location:", "Rename Funding Source:", "Rename Model Number:", "Rename Serial Number:", and "Rename Condition:". The "Application Settings (F2)" pane contains input fields for "Root Image Folder:", "Root Document Folder:", "Custom Report Folder:", "Report Logo:", "Report Auto E-mail Setup", "SMTP Host:", "From E-mail Address:", "SMTP User Name:", "SMTP Password:", and "Use SSL/TLS:". There is also an "OK" button in the top right corner.

Classification, Type, Facility, Location, and Funding Source are parameters tied to assets. Model Number, Serial Number, Account, Condition, Master, Miscellaneous, Asset Number, and Container can be renamed to suit your needs.

If you would like to alter any of the names, type in the desired value and then click the OK button.

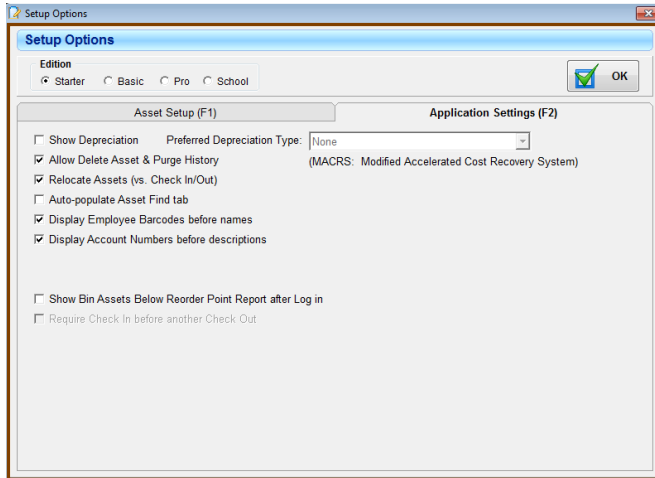
The root image folder is the default location for images that you wish to tie to an asset. If the image is in the default location, only the file name is required in the asset screen to identify the image.

The Custom Report Folder is the location for custom report files. 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.

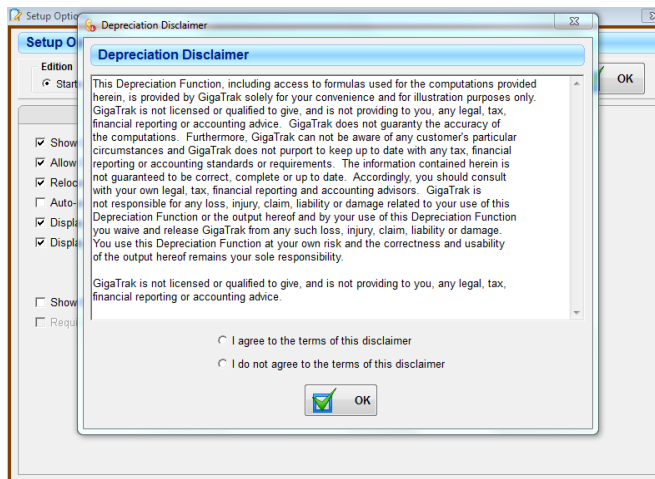
The Report Logo allows the display of a company logo on reports. You can select a .bmp, .gif, or .jpg file. To clear a logo after it is selected, click the “Select” button and click Cancel on the selection screen.

APPLICATION SETTINGS

Application Settings control various functions in the asset tracking application.



SHOW DEPRECIATION



If Show Depreciation is checked, then the depreciation information will be visible on the Asset information screen. The Asset 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 disclaimer.

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

ALLOW DELETE ASSET & PURGE HISTORY

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

RELOCATE ASSETS

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

AUTO-POPULATE ASSET FIND TABS

When checked, the system will automatically display information when a Find screen is opened. If not checked, you must first click “Extract Data” to view a listing.

DISPLAY EMPLOYEE BARCODES BEFORE NAMES

This applies to several report selection filters. If you view employees primarily by their names, leave this unchecked. If you prefer tracking employees by the Barcode ID, then check the checkbox.

DISPLAY ACCOUNT NUMBERS BEFORE DESCRIPTIONS

The same rules apply to this option. Select how you prefer to view your report filters here. If you will view accounts by descriptions, leave this unchecked. If you prefer tracking accounts by numbers, check the box.

SHOW BIN ASSETS BELOW REORDER POINT REPORT AFTER LOG IN

By selecting this option, the system will automatically display the report of any binned items below the reorder point immediately following log in.

REQUIRE CHECK IN BEFORE ANOTHER CHECK OUT

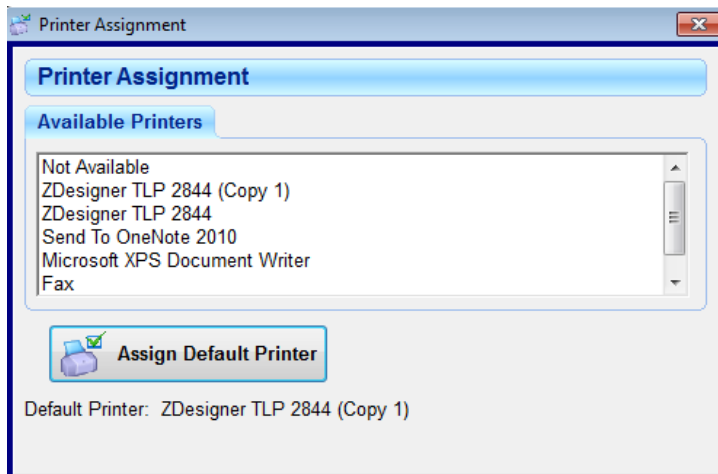
Checking this box will require a checked out asset to be checked back in to the storage location before it can be checked out again. Leaving this unchecked will allow an asset to be checked out from person to person (or location to location) without being returned to the storage location.

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

To leave the 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.



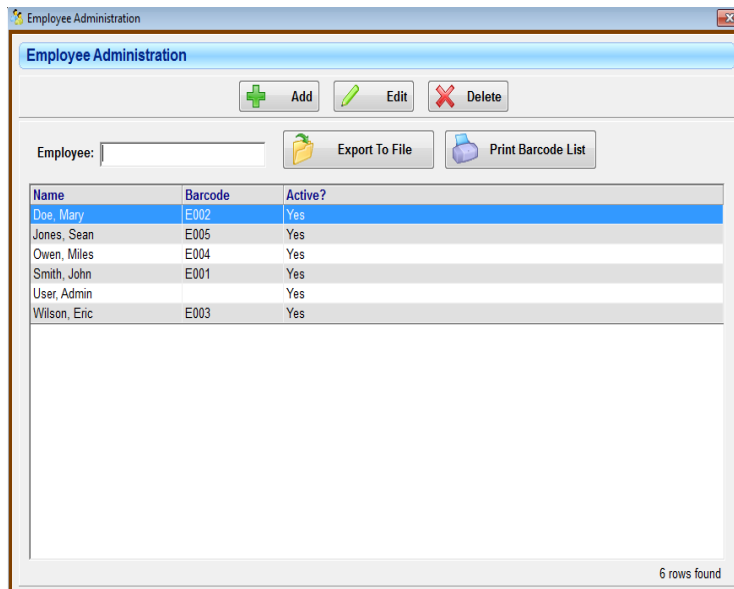
The Available Printers list will display all the printers that are on the Windows printer list.

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

EMPLOYEE ADMINISTRATION

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



Upon initial setup, the only employee will be the Admin user. 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.

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

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

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

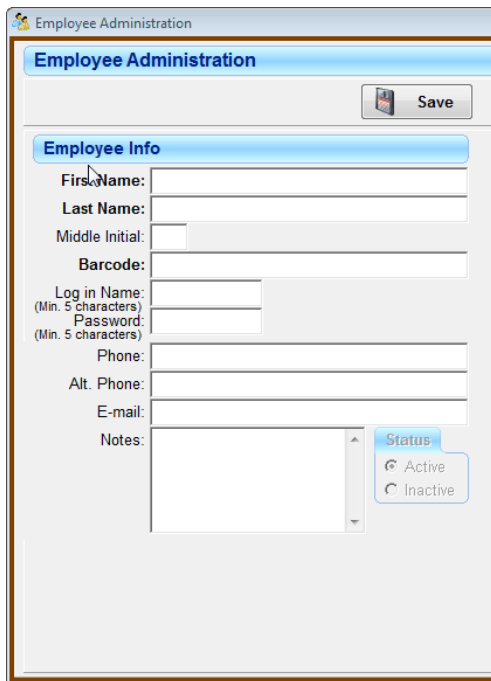
To print employee labels, select the employee(s) to be printed and then select the Print Label button. If a label printer has been selected and if a default employee label has been designated (see Label Designer in this manual), the label(s) will be printed.

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.

EMPLOYEE INFORMATION

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



The screenshot shows the 'Employee Administration' window with a 'Save' button. The 'Employee Info' section contains the following fields: First Name, Last Name, Middle Initial, Barcode, Log in Name (with a note '(Min. 5 characters)'), Password (with a note '(Min. 5 characters)'), Phone, Alt. Phone, E-mail, and Notes. A 'Status' dropdown menu is open, showing 'Active' and 'Inactive' options.

The barcode entry must be unique. A barcode for an asset, location, or employee cannot be the same. Keep the barcode as simple as possible, only using a short 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.

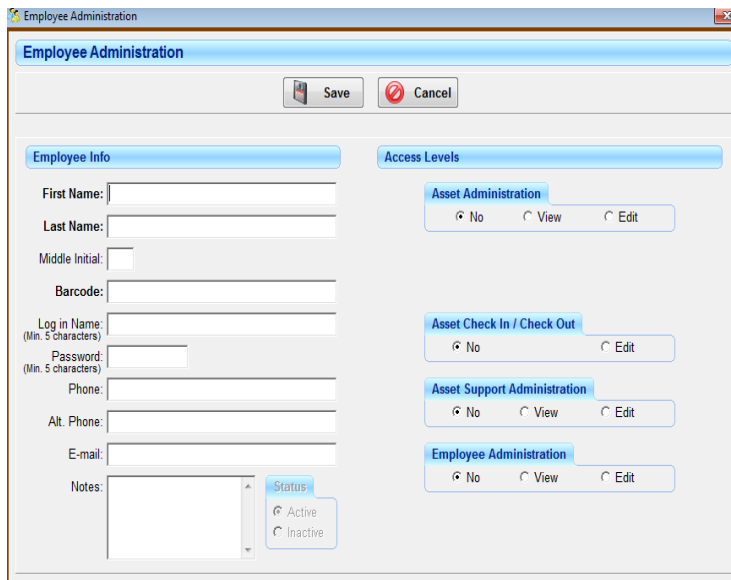
If the employee will be using the ATS system, he will require a Log in Name and Password.

The Log in Name must be between 5 and 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 between 5 and 10 characters long. Passwords are not case sensitive.

EMPLOYEE ACCESS LEVELS

Once the employee information is entered, set the employee's access levels. The default access level is for no access to ATS.



The screenshot shows the 'Employee Administration' window. It has a title bar with 'Employee Administration' and a close button. Below the title bar are 'Save' and 'Cancel' buttons. The window is divided into two main sections: 'Employee Info' and 'Access Levels'. The 'Employee Info' section contains fields for First Name, Last Name, Middle Initial, Barcode, Log in Name (Min. 5 characters), Password (Min. 5 characters), Phone, Alt. Phone, E-mail, and Notes. The 'Access Levels' section contains four sub-sections: 'Asset Administration', 'Asset Check In / Check Out', 'Asset Support Administration', and 'Employee Administration'. Each sub-section has radio buttons for 'No', 'View', and 'Edit'. A 'Status' dropdown menu is located at the bottom right of the 'Employee Info' section, with options for 'Active' and 'Inactive'.

Asset Administration - applies to activities associated with creating and editing asset data.

Asset Check In/Check Out- applies to activities associated with assigning assets to an individual or location, or returning assets to storage.

Asset Support Administration - applies to activities that support the overall asset process. This will include managing facilities, locations, asset types, classifications, and conditions.

Employee Administration– applies to activities associated with managing employee information.

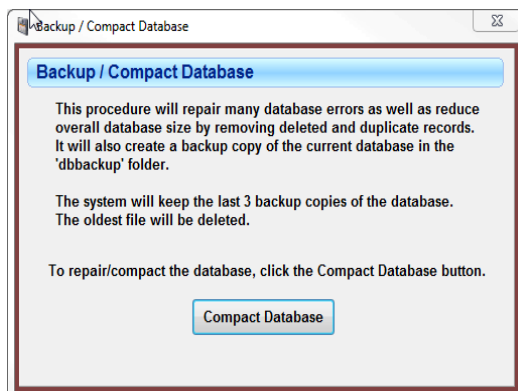
Select the access level appropriate for the employee in question and then select the OK button.

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.

OTHER FILE MENU FUNCTIONS

BACKUP/COMPACT DATABASE

If you have the Access version of ATS, this option is used to periodically repair, compact, and backup the ATS database. To determine if you have the Access version of ATS, go to the Help tab → About and the header of the box will say “About (Access)”



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.

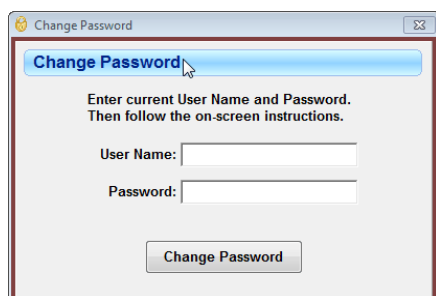
MS Access does not automatically remove data that is deleted by the system. Compacting the database will remove data that has been deleted. This will reduce the size of the database file and improve performance.

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.

CHANGE PASSWORD

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



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

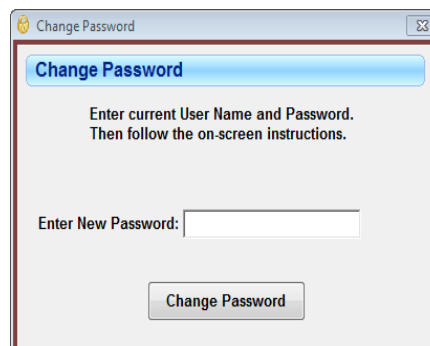
Passwords must be between 5 and 10 characters long.

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

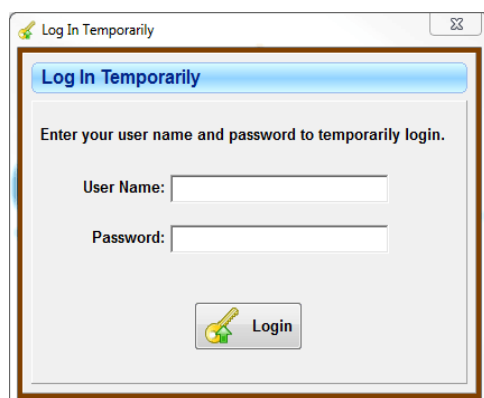
Type in your new password again. If the password matches the new password you typed earlier, the system will save the new password and the Change Password screen will disappear.

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

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



LOGIN TEMPORARILY



Log in temporarily is a function used in order to perform some function that the current user may not complete without the current user having to exit the program.

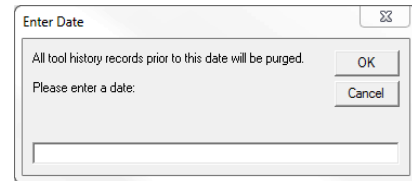
Select Log In Temporarily under the file menu. The screen at right will appear. Enter your user name and password, and then select the Log In button.

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.

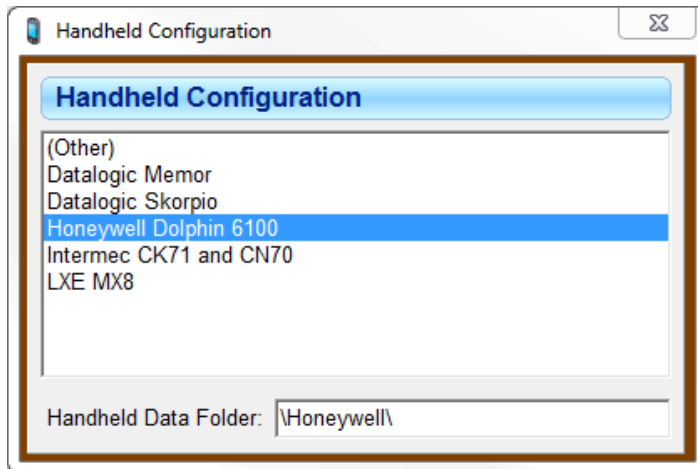
PURGE HISTORY

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



HANDHELD CONFIGURATION

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

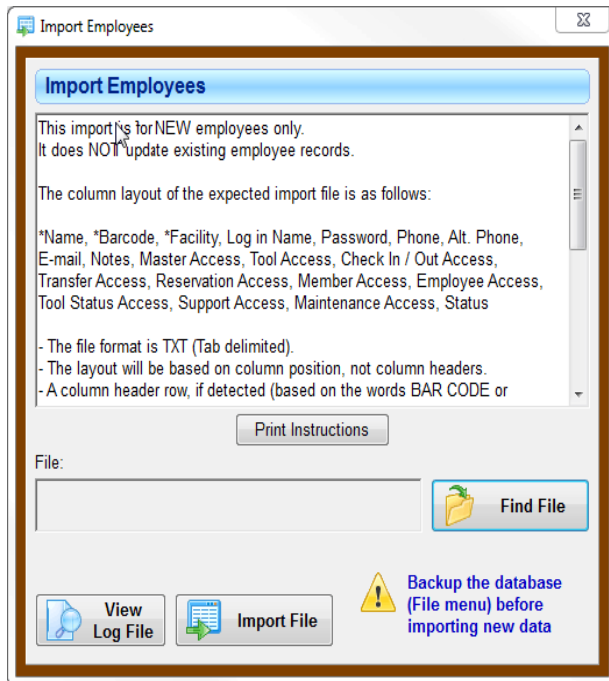


To view the Handheld Configuration screen, click the File menu item and select Handheld Configuration.

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

Further instruction on how to use the Handheld device and configuring it with the Asset Tracking System will be discussed later.

IMPORTS



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 Assets: Allows the import of asset data into the ATS system.

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 ATS.

Import Locations: Allows the import of location data into the ATS system.

HELP MENU FUNCTIONS

CHECK FOR UPDATE

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

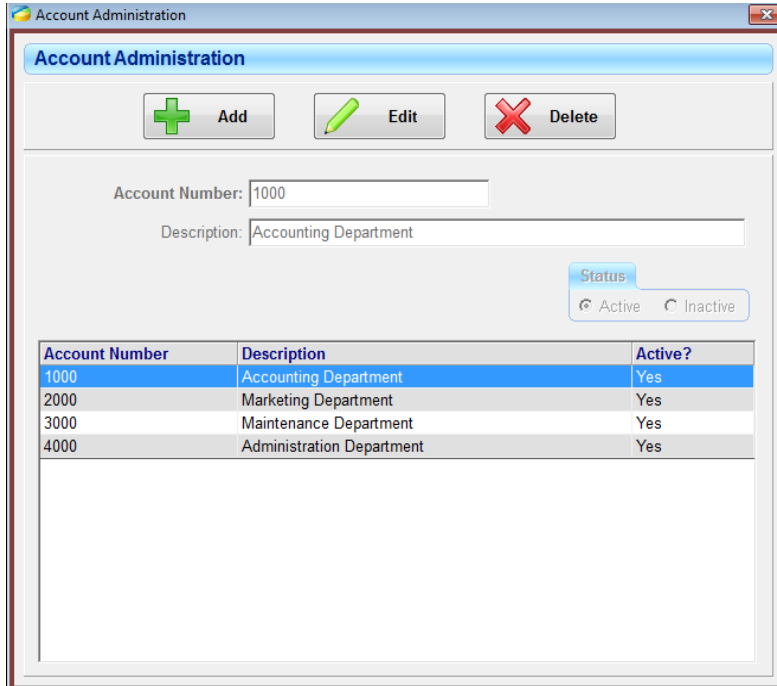
ABOUT

The "About" section tells you which version of the software you currently have as well as some brief licensing information. This area also specifies which database the software uses for your system. This section is particularly helpful to the support and training teams when working to assist you on any questions you may have regarding the ATS system.

SUPPORT MENU FUNCTIONS

ACCOUNT ADMINISTRATION

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



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, there are two input fields: 'Account Number' with the value '1000' and 'Description' with the value 'Accounting Department'. To the right of these fields is a 'Status' section with two radio buttons: 'Active' (selected) and 'Inactive'. Below the input fields is a table with the following data:

Account Number	Description	Active?
1000	Accounting Department	Yes
2000	Marketing Department	Yes
3000	Maintenance Department	Yes
4000	Administration Department	Yes

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

ASSET CONDITION ADMINISTRATION

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

The screenshot shows the 'Asset Condition Administration' window. At the top, there are three buttons: 'Add' (green plus icon), 'Edit' (green pencil icon), and 'Delete' (red X icon). Below these are two text input fields: 'Condition:' with the value 'Excellent' and 'Description:' with the value 'New or nearly new'. To the right of the description field is a 'Status' dropdown menu currently set to 'Active', with 'Inactive' as an option. Below the form is a table with the following data:

Condition	Description	Active?
Excellent	New or nearly new	Yes
Good	minimal damage	Yes
Needs Repair	Item needs maintenance	Yes
Poor	Damage with functionality problems	Yes

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

Condition name may be up to 20 characters and is required. This name must be unique.

Description may be up to 80 characters long and is not required

A Condition set as active may be assigned to an asset; a Condition set as inactive will not be available for assignment to an asset. Setting a condition as “inactive” minimizes clutter, but retains historical information tied to each condition.

To add a new Condition, select the “add” button, enter the new Condition (name) and Description, and click “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.

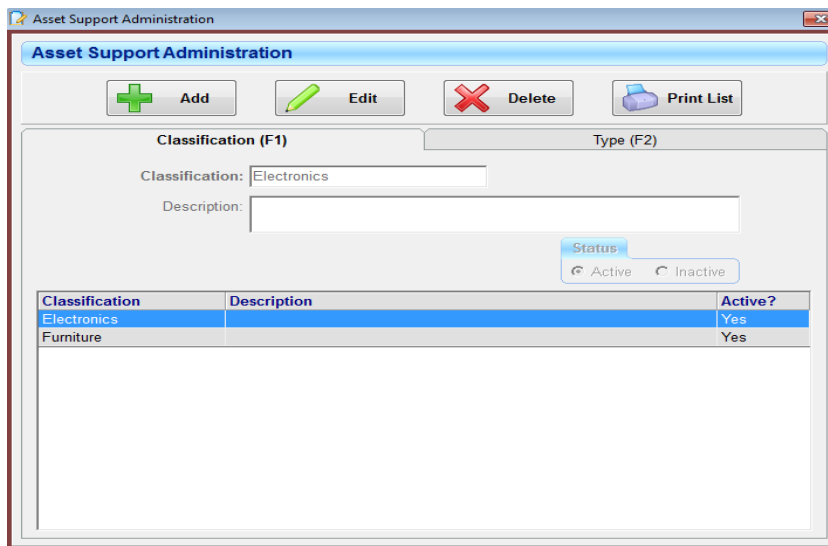
To delete a Condition, select the Condition to be deleted and then select the Delete button. The system will check to see if the Condition is assigned to an asset. If so, the system will not allow the Condition to be deleted. You may inactivate the Condition to prevent it from being assigned to future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

ASSET SUPPORT ADMINISTRATION

Asset Support Administration is used to administer Classifications and Types. To access this process, select Asset Support Administration under the Support menu. Asset Support Administration has two tabs: Classification and Type.

CLASSIFICATION

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



Classification	Description	Active?
Electronics		Yes
Furniture		Yes

Each Classification has a name (Classification) and Description. In addition, a Classification may be designated as Active or Inactive. A classification assigned as active may be tied to an asset; an inactive classification may not be tied to an asset.

A classification may be set as inactive to reduce clutter yet retain important historical information.

- 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.

Activities available for Classifications are:

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

Adding a New Classification

To add a new Classification, select the Add button.

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

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

Editing an Existing Classification

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

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

3. Select the Cancel button to exit the Classification change without saving the changed Classification.

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

Deleting an Existing Classification

To delete a Classification, select the Classification to be deleted and then select the Delete button.

1. The system will check to see if the Classification is assigned to an asset.
2. If so, the system will not allow the Classification to be deleted. You may inactivate the Classification to prevent it from being assigned to future assets if you desire.

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

TYPE

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

Type	Description	Active?
Computer		Yes
Phone		Yes
Printer		Yes
Projector		Yes

Each Type has a name (Type), Description, and Depreciation period in years. In addition a Type may be designated as Active or Inactive. A Type set as active may be assigned to an asset; a Type set as inactive will not be available to be assigned to an asset.

A type may be set as inactive to reduce clutter, yet retain important historical information.

- 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.

Activities available for Types are:

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

Adding a New Type

To add a new Type, select the Add button.

1. Select the appropriate Classification for the new Type.
2. Enter the new Type (name), Description, and depreciation period.

3. Select the Save button to save the new Type.

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

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

Editing an Existing Type

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

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

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

Deleting an Existing Type

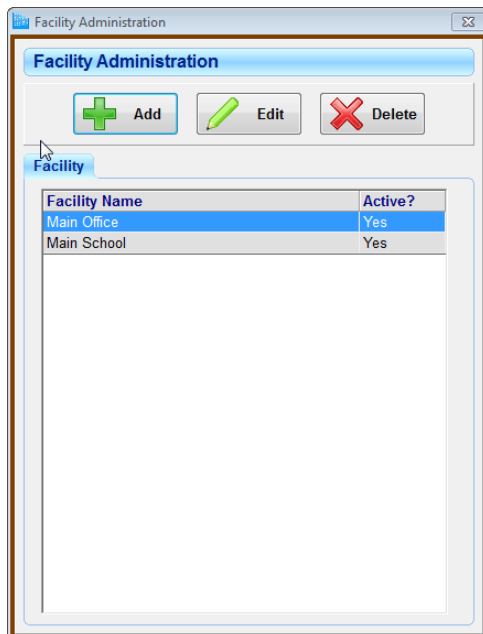
To delete a type, select the Type to be deleted and then select the Delete button.

1. The system will check to see if the Type is assigned to an asset.
2. If so, the system will not allow the Type to be deleted. You may inactivate the type to prevent it from being assigned to future assets if you desire.

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

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.

Facility information consists of:

Unique Name- up to 40 characters and is required.

Address - up to 40 characters long, but is not required.

City- up to 40 characters long, but is not required.

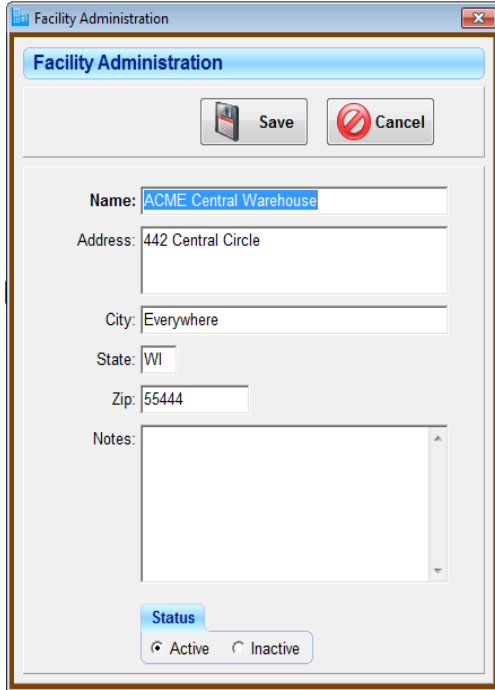
State-up to 2 characters long, but is not required.

Zip Code- up to 10 characters long, but is not required.

Notes-up to 255 characters long, but is not required.

Activities available for Facilities are:

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



The screenshot shows a window titled "Facility Administration" with a sub-header "Facility Administration". At the top right are "Save" and "Cancel" buttons. The form contains the following fields: "Name" (text input with "ACME Central Warehouse"), "Address" (text input with "442 Central Circle"), "City" (text input with "Everywhere"), "State" (text input with "WI"), "Zip" (text input with "55444"), and "Notes" (text area). At the bottom, there is a "Status" section with radio buttons for "Active" (selected) and "Inactive".

Adding a New Facility

To Add a new facility, select the Add button.

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

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

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

Edit an Existing Facility


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

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

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

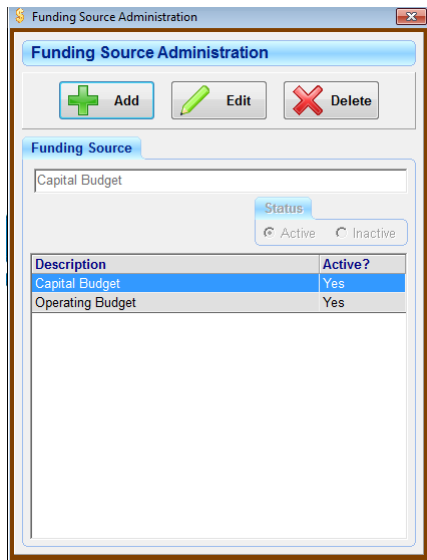
Deleting an Existing Facility

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

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

FUNDING SOURCE ADMINISTRATION

Funding Source Administration is used to keep track of the agency that provided the asset. The Funding Source is not required to use ATS.



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

Activities available for Funding Source are:

- Adding new Funding Source
- Editing existing Funding Source
- Deleting Funding Source

Adding a New Funding Source:

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

Editing an Existing Funding Source:

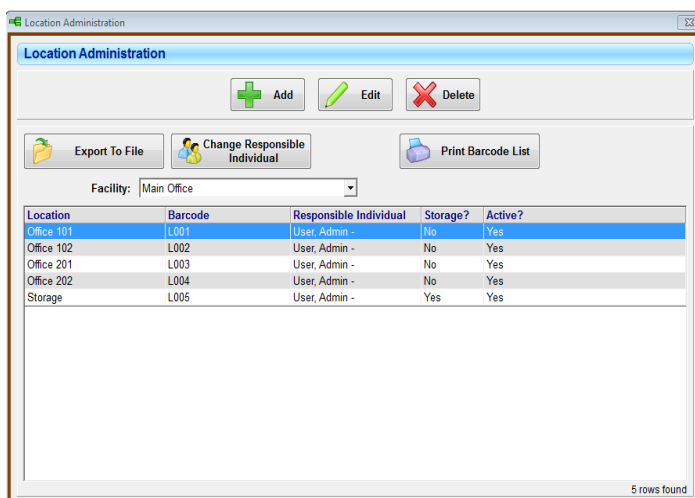
To Edit a Funding Source, select the Funding Source of interest and then select the Edit button. Modify the information as desired. Select the save button to Save the Funding Source changes. Select the Cancel button to exit the Funding Source addition without saving the changes.

Deleting an Existing Funding Source:

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

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

LOCATION ADMINISTRATION



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

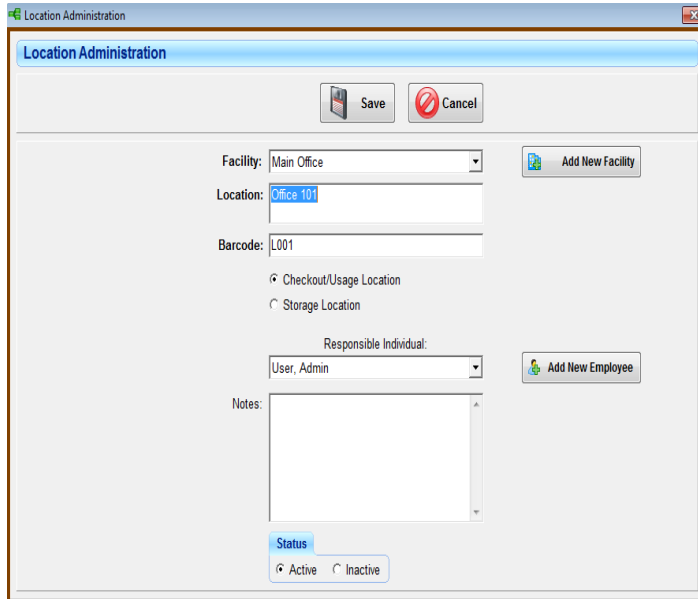
To add a new Location, select the Facility to which it is to be added and then select the Add button.

Enter the location information as desired:

Facility - defaults to the facility selected on the main form but may be changed.

Location - may be up to 50 characters and is required. Must be unique to each location.

Barcode - may be up to 20 characters long and is required. A barcode for an asset, location, or employee cannot be the same.



Checkout/Usage Location - location that assets can be checked out to.

Storage Location - location used for storage rather than usage.

Transfer Location - location that assets transfer to.

Responsible Individual - employee that is responsible for the assets 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.

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 an asset is tied to the location or the Location is being used in a history record. If so, the system will not allow the Location to be deleted. You may inactivate the Location to prevent an asset from being assigned to the Location in the future if you desire.

EXPORT LIST TO FILE

This button 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 then 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 then 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.

ASSETS SCREEN

The Asset Management process is started by selecting the Assets button on the main toolbar, which displays the screen below:

FIND ASSET

Three tabs are displayed. The first is the “Find” tab, which is used to view assets and print lists of assets. The tab is controlled by sections on the upper part of the form, allowing you to filter and view those items by:

Barcode	Description	Asset Number	Product Number	Serial Number	Storage Location	Storage Bin Qty	Out Bin Qty	Out To	Date Out	Due Date	Funding Source	Acct Num
A0001	HP Elite 840 G3 Central Processor System, Classroom	746757			Office 101						Operating Budget	4000 / Administration Department
A0002	Staple Series 4-Leg Combs Desk Right Handed with Laminate Top	ANVRH			Office 101				4/22/2015		Capital Budget	3000 / Maintenance Department
A0003	Prestige Modular Office Group 6	BPTG-6			Office 101			Classroom 101 (Responsible Unassigned)	7/9/2015		Capital Budget	4000 / Administration Department
A0004	HP Latent Enterprise Row MFP M250	CF118ABEG			Storage						Capital Budget	4000 / Administration Department
A0005	Sedona Cherry Office Series 3-Piece Full Line Desk/Chair	DCF-BKW			Office 102				5/13/2015		Capital Budget	1000 / Accounting Departm
A0006	WEGA 3200 Lumens Standard Throw Projector	DCL-35A			Office 102			Classroom 101 (Responsible Unassigned)	7/9/2015		Capital Budget	4000 / Administration Department
A0007	Prestige Modular Mailroom Space-Saver Base/Sorter Module	DMM-S316			Office 102			Smith, John	7/9/2015		Capital Budget	3000 / Maintenance Department
A0008	Multi-Shot 247 Steel with Arms (Fabric Upholstery)	EPH-247A-S			Office 101			Smith, John	7/23/2015		Operating Budget	2000 / Administration Department
A0009	4-Drawer Fire/Retardant Lateral File	FKL444			Office 101			Smith, John	7/9/2015		Capital Budget	1000 / Accounting Departm

- Facility
- Location
- Funding Source
- Account
- Search by Criteria
- Classification
- Type
- Condition
- Status

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

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

SEARCH FIELD

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

ADD TO LIST

The Add To List button can be used to build a custom list of assets. When selected, it will appear to remain depressed. When in this mode, assets that are extracted will be added to the list of assets already shown on the screen, rather than clearing the screen first. You can continue to change the selection filters and extract the assets 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 Assets in the list, select the Print List button. A report is displayed and if the default printer is set, the Assets displayed on the screen will be printed when Print is selected. You may also PDF or Email the report directly.

PRINT BARCODE LIST

Print Barcode List will print a list of the displayed asset barcodes that can be used for scanning. The list will include the Barcode number, Barcode, Description, Product Number, and Serial Number. 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 assets to a tab delimited text file.

ASSET IMAGE

If an image is assigned to an asset, a thumbnail picture will be displayed in the Description column of the grid. The thumbnail display can be turned on or off by right-clicking in the grid and selecting "Show Thumbnail Images" in the pop-up menu. A larger view of the image can be displayed by selecting "View Image" from the pop-up menu.

To find a specific Asset by its barcode:

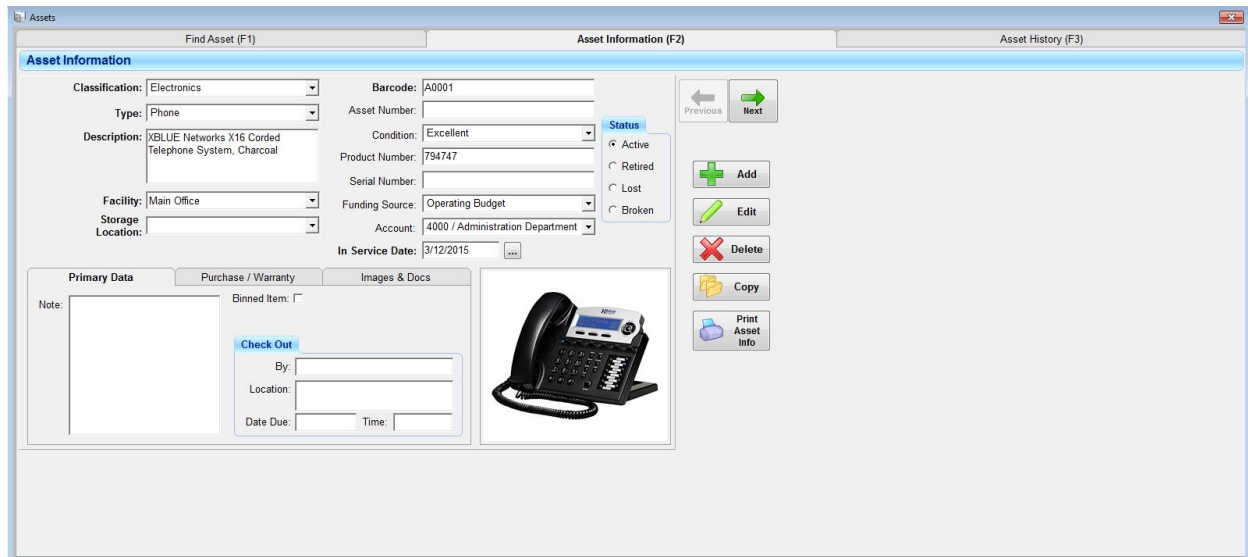
- Select Barcode in the Search Field box
- Select the Search Text Box (background will turn yellow when selected)
- Type in the barcode and select the Enter key. You can also select the "Extract Data" button to display the asset.

To find assets by the in-service date:

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

ASSET INFORMATION

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



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

- Classification is a method of grouping Assets
- Type is a subset of Classification and a second method of grouping Assets
- Description is up to 80 characters describing the Asset
- Facility is the building in which the Asset is located
- Storage Location is the default storage location for the Asset
- Funding Source is the agency that provided the Asset
- In Service Date is the date the asset was put into service (defaults to current date)
- Barcode is the barcode that identifies the Asset. You must enter the first asset's barcode number manually in a format that all barcodes will use (i.e. A00001). The system will then automatically increment the numerical portion of the barcode number one at a time. If you are using pre-printed barcodes, enter the number seen on the barcode.
- Asset Number is the unique permanent number given to an item for tracking. An asset number is usually engraved on larger, more expensive items.
- Condition is the physical condition of the Asset. Condition does not apply to binned items.
- Manufacturer is the manufacturer of the Asset (data entered on the Manufacturer Administration screen)
- Model is the model number of the Asset
- Serial Number is the Serial Number of the Asset
- Account is the account number used to purchase the Asset
- Status. An Active asset may be checked out, A Retired asset may not be checked out.

PRIMARY DATA SUB-TAB

- Note is up to 255 characters of information about the Asset
- Container allows other assets 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, a box will appear to enter a bin quantity. There will also be an option to set the item as a consumable. Consumable assets can be checked out, but are not expected to be checked back in (e.g. gloves)
- Check Out determines whether an asset is checked out or not. If it is checked out, the following information will be available
 - By: User to whom the asset is checked out
 - Location: location to which the asset is checked out
 - Due Date: date the asset is due to be checked in

PURCHASE / WARR. SUB-TAB

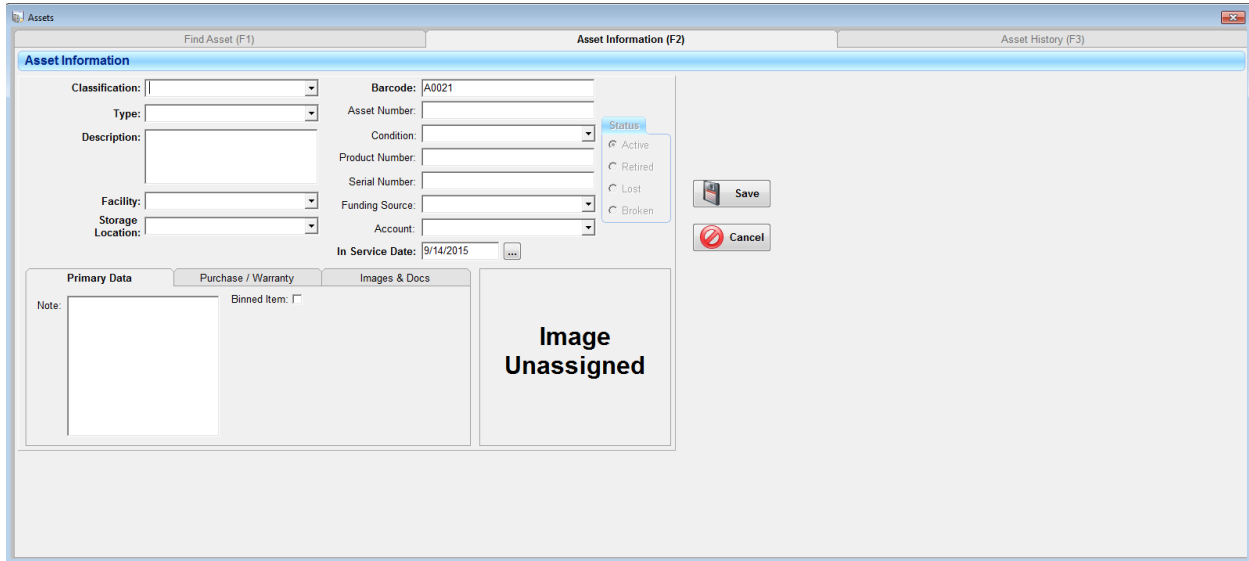
- Purchased From allows entry of general supplier information
- Warrant Expiration Date tracks when a warranty period expires
- Depreciation period in years (does not apply to bin items)
 - NOTE: fields relating to Depreciation will not be visible unless the “Show Depreciation” checkbox is checked on 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 Asset
- Salvage Value is the remaining value of the asset after it has been fully depreciated
- Current Value is the current depreciated value of the Asset (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

Asset Image is the path to a file that contains a picture of the asset. If the image information is entered and a file is at the proper location, the picture will be displayed 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 Asset.

ADDING A NEW ASSET

To Add a new Asset, select the Add button. All information is cleared and the Save and Cancel buttons appear.



The screenshot shows the 'Asset Information' form in the 'Assets' application. The form is divided into several sections: 'Classification' (dropdown), 'Type' (dropdown), 'Description' (text area), 'Facility' (dropdown), 'Storage Location' (dropdown), 'Barcode' (text field with 'A0021'), 'Asset Number' (text field), 'Condition' (dropdown), 'Product Number' (text field), 'Serial Number' (text field), 'Funding Source' (dropdown), 'Account' (dropdown), and 'In Service Date' (text field with '9/14/2015'). A 'Status' dropdown is also present with options: Active, Retired, Lost, and Broken. Below the main form are three tabs: 'Primary Data', 'Purchase / Warranty', and 'Images & Docs'. The 'Primary Data' tab is active, showing a 'Note' text area and a 'Binned Item' checkbox. The 'Images & Docs' tab shows a large area labeled 'Image Unassigned'. To the right of the form are 'Save' and 'Cancel' buttons.

If turned on in System Setup, the system will automatically generate a unique barcode for the asset 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 Asset by selecting the Save button. The screen will return to the original state with the new Asset information.

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

EDITING AN EXISTING ASSET

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

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

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

COPYING AN EXISTING ASSET'S INFORMATION TO A NEW ASSET

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

The system will automatically generate a unique barcode for the asset. If this barcode is unacceptable, it can be typed over by the user. The barcode entry must be unique. A barcode for a asset, location, or employee cannot be the same. Change the asset's information as desired and add the new barcode. Save the Asset by selecting the Save button, the screen will return to the original state with the new Asset information.

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

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

ASSET HISTORY

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

The screenshot shows the 'Asset History' window with the following details:

- Barcode: A0001
- Product Number: 794747
- Date: 6/16/2015
- Description: XBLUE Networks X16 Corded Telephone System, Charcoal
- Serial Number: (empty)
- From: 6/14/2014
- To: 9/14/2015
- Buttons: Purge Selected Asset's History, Print List

Date	Type	From	Person	Location	Condition	Bin Qty	Transaction By	Check Out Note
8/27/2015 11:18 AM	Checked in	Office 102		Office 101	Excellent		User, Admin	
8/27/2015 11:17 AM	Checked out	Richards, Sally		Office 102	Excellent		User, Admin	
6/30/2015 12:49 PM	Relocated	Office 101	Richards, Sally		Excellent		User, Admin	
6/19/2015 11:41 AM	Checked in	Smith, John		Office 101	Excellent		User, Admin	
6/19/2015 11:40 AM	Checked out	Munroe, Connor	Smith, John		Excellent		User, Admin	
6/16/2015 02:03 PM	Relocated	Office 101	Munroe, Connor		Excellent		User, Admin	
6/1/2015 10:55 AM	Relocated	Office 202		Office 101	Excellent		User, Admin	
5/21/2015 10:01 AM	Checked in	Munroe, Connor		Office 202	Excellent		User, Admin	
5/21/2015 10:00 AM	Checked out	Office 202	Munroe, Connor		Excellent		User, Admin	
5/6/2015 11:15 AM	Checked in	Smith, John		Office 202	Excellent		User, Admin	
5/6/2015 11:14 AM	Checked out	Office 202	Smith, John		Excellent		User, Admin	
5/5/2015 03:34 PM	Relocated	Smith, John		Office 202	Excellent		User, Admin	
4/23/2015 03:43 PM	Relocated	Office 101	Smith, John		Excellent		User, Admin	
4/22/2015 10:42 AM	Hand Held Relocate	Office 101		Office 101	Excellent		Smith, John	
3/12/2015 03:33 PM	Checked out	Storage		Office 101	Excellent		User, Admin	
3/12/2015 01:17 PM	Added New Asset			Storage	Excellent		User, Admin	

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

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

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

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

CHECK IN/CHECK OUT ASSETS SCREEN

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

CHECK OUT

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

The screenshot displays the 'Check In/Out' application window. The 'Check Out (F1)' tab is active. The interface includes a toolbar with 'Save', 'Save / Print', 'Reset / Clear', and 'Remove Item' buttons. Below the toolbar, there are three tabs: 'Check Out (F1)', 'Check In by Asset (F2)', and 'Check In by Person / Location (F3)'. The 'Check Out (F1)' tab contains the following fields: 'Barcode:' (with a search icon), 'Location:' (with a search icon), 'Due Date:' (with a search icon), 'Default Interval (days):' (with a search icon), 'Time Due:' (with a search icon), 'Note:' (text area), 'Asset Barcode:' (with a search icon), and 'Description:' (with a search icon). Below these fields is a table with the following columns: Barcode, Description, Due, Out, Condition, Person, Location, Bin Qty, and Note. The table is currently empty. At the bottom of the window, the status bar shows 'User Name: User_Admin' and 'Database: localhost/win_ats'.

To check out assets:

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

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

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

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

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 assets 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 ASSET

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

Barcode	Description	Due	Return	Condition	Facility	Location	Bin Qty	From Person / Location	Status
---------	-------------	-----	--------	-----------	----------	----------	---------	------------------------	--------

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

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 assets 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

To check in assets 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.

To check an asset 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 asset 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 assets 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.

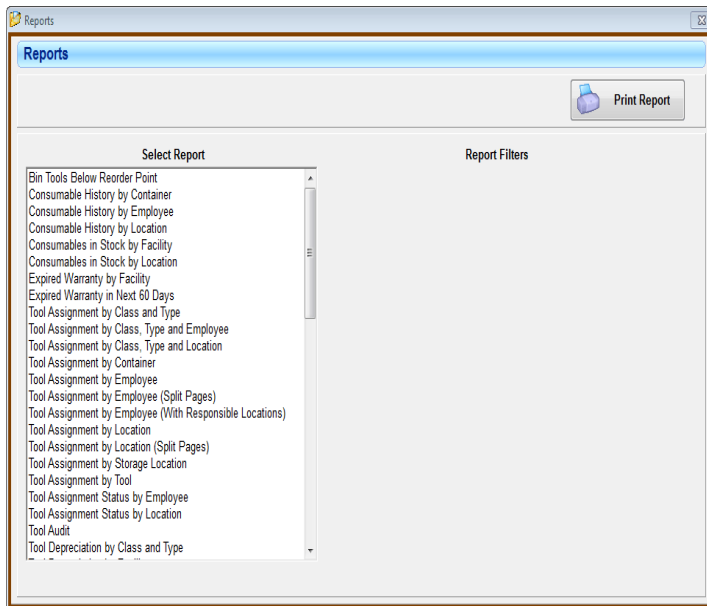
When all assets have been checked in, select the Save or Save/Print button. The check in information will be saved and, if Save/Print was selected the system will ask if you wish to print the check in report. The system will then clear the check in list.

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.

REPORTS SCREEN

Each report has a different set of Report Filters that the user can select to create the report results they desire.



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

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

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 Asset 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 with an email address record will receive their email report.

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.

SUPPORT

GigaTrak provides 90-days of telephone support for ATS from the date of purchase. GigaTrak will advise on installation issues but the customer is responsible for network and SQL Server installation. Our hours are 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.