

VERSION 1.7.0



# **DTS USER MANUAL**

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## QUICK START OVERVIEW

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

### ACCESS GROUPS

This function allows users to create various groups with different levels of access and capabilities within the DTS system. Employees can then be assigned to these access groups to determine each individual's level of access. To access this function, select Admin→Access Groups from the main menu bar.

### EMPLOYEES

This function allows users to be added into the system. Users are those who access the PC application, use the mobile handheld device, or have documents being assigned to them. To access the function, select Admin→Employees from the main menu bar.

### LOCATION TYPE

This function allows users to create a skeleton of location hierarchies throughout the system. These location types are created in the parent-child format and are used to set up actual locations for items. On the menu bar, select Admin→Location Type.

### ITEM TYPE

This function allows users to create a skeleton of item hierarchies throughout the system. These item types are created in the parent-child format and are used to set up actual items. On the menu bar, select Admin→Item Type.

### CUSTOM IMAGES

The system allows the user to assign custom images for use throughout the system. These images reflect location/item types and are used to easily differentiate between two objects. On the menu bar, select Admin→Custom Images.

### LOCATIONS

This function allows users to create locations where documents are stored or where documents are assigned. Locations are derived from the location-type hierarchy previously created. On the main menu bar, select Locations.

### ITEMS

The system allows users to create items (documents, folders, etc.) that will be tracked with DTS. Items are derived from the item-type hierarchy previously created. On the main menu bar, select Items.

## 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 Settings→Printer Assignment.

## LABEL DESIGN

The system allows the user to create labels for employees, items, and locations. These labels typically have barcodes and can be used to audit and transfer documents. 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 Admin→Label Designer. See Label Designer in this manual for a detailed explanation.

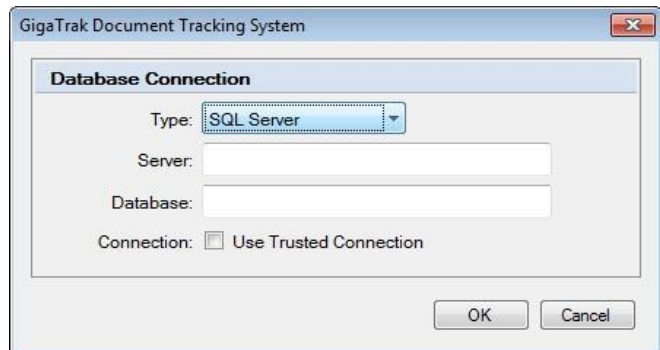
Once you have set up your initial data, you are ready to begin using DTS. Transfer documents and items to employees or locations and keep a complete history of chain of custody. Be diligent on usage, and the Document Tracking System will provide reliable tracking for all of your documents and items!

**Remember to back-up your database daily!**

## GETTING STARTED

### CONNECTING TO DATABASE

When the program first starts, you will be prompted to enter your SQL Server and Database name. Type in the server and database names in their respective fields in order to connect to your database. If you have not created the SQL database, please refer to the DTS Installation Guide for instructions on setting up your SQL database. This can be found on the Client Center portion of the GigaTrak website.



### LOGGING IN

After entering the database information, you will be met with the Log-In information in the upper right corner. To start, there is only one administrative user.

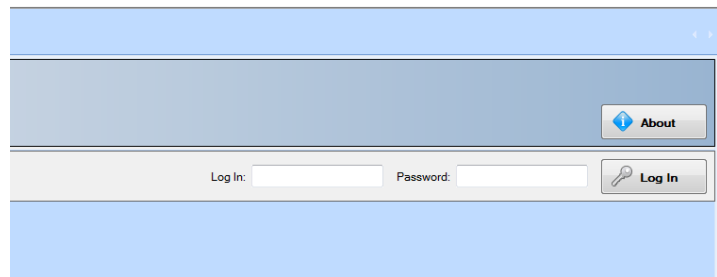
**Username:** admin

**Password:** adminuser

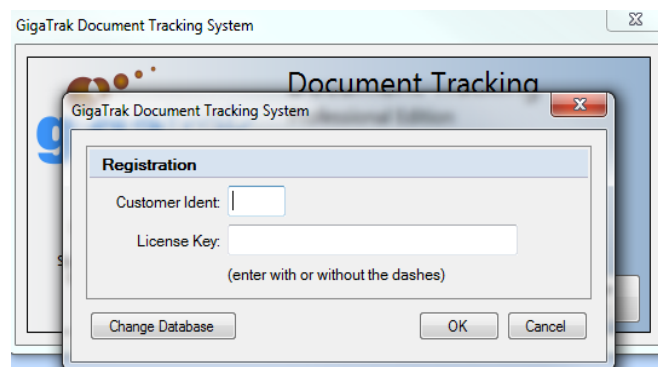
Once you are logged into the system as the administrator, you may add other users.

After users are entered into the system,

each user should log in with their own username and password. Please refer to the 'access groups' and 'employees' sections of this manual for more information regarding users in the DTS system.



### REGISTRATION



The registration process is used to assign a registration/license key to the program and the database. When the program is purchased, GigaTrak will provide the 4-digit Customer Identifier and the 16-digit License Key. Access to this screen is only available when the Admin login is used.

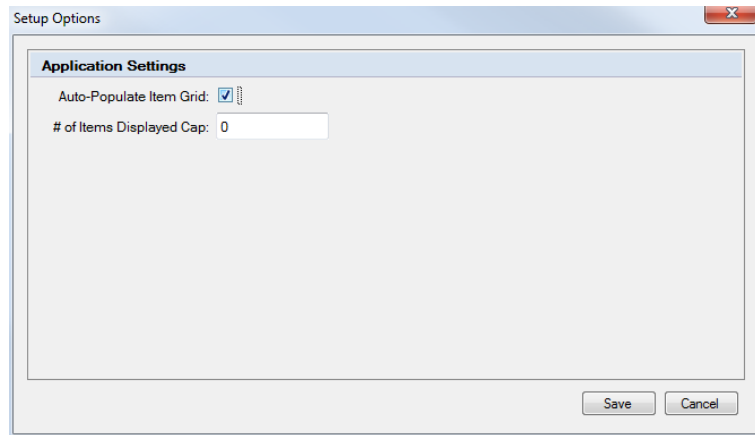
To reach the Registration screen, log in with the Admin login, and click the "about" button

on the home menu. Click on "Change Registration/Database" button, then enter the Customer Identifier and License Key that you received from GigaTrak. This process only needs to be done once per database.

## SETTINGS

### SETUP OPTIONS

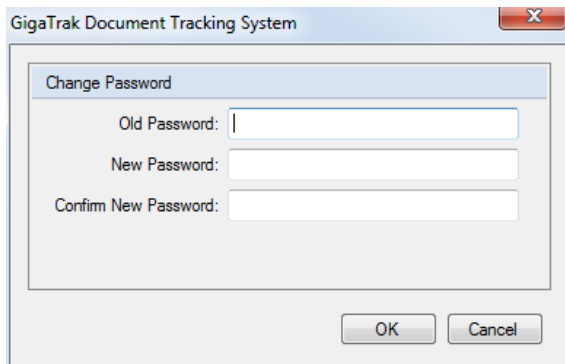
There are two options in the Setup Options menu. The first option gives you an “Auto-populate Item Grids” checkbox. When this option is selected, the item grids will automatically display information when a Find screen is opened. If not checked, you must “extract” data first in order to view a listing.



The second option displays a textbox for the “# of Items Displayed Capacity”.

If you have a very large number of documents tracked, you can set the number you would like to see at one time. For example, if you have 60,000 documents and set the “# of Items Displayed Capacity” at 2,000, only 2,000 random documents will be shown in the grid.

### CHANGE PASSWORD



A user currently logged into DTS may change their password at any time. Select Settings → Change Password and the screen at the left appears.

Type in your current password in the “old password” textbox and then type in your new password twice. Then click “ok” to change the password. If the new passwords match, the system will save the new password and the screen will disappear. If the passwords do not match, the system will state that

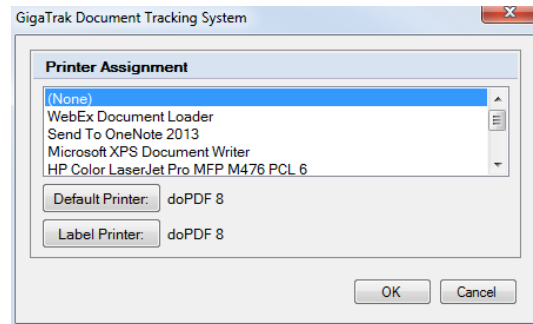
they do not match and ask to try again.

Passwords must be between five (5) and ten (10) characters long.

## PRINTER ASSIGNMENT

The printer assignment process is used to set the printer that they system will use for printing reports and barcode labels. Select Settings→Printer Assignment to display the Printer Assignment screen.

The available printers list will display all the printers currently on the Windows printer list. If you cannot find the printer you are looking for, check to make sure the printer is installed on your computer.

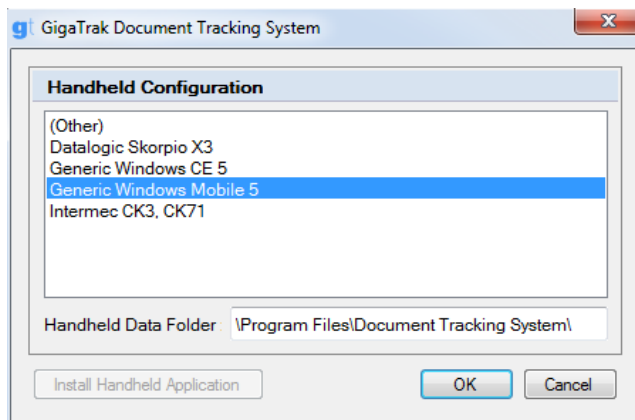


To select the report printer, select the printer of choice and click the “assign default printer” button. Any reports printed by this DTS workstation will be directed to this printer.

To select the label printer, if applicable, select the printer of choice and click the “assign label printer” button. Any barcode labels printed by this DTS workstation will be directed to this printer. If you do not have a label printer, assign the label printer to the same printer as the default printer.

This does not affect the Windows default printer selection.

## HANDHELD CONFIGURATION



The Handheld Configuration screen is used to select the handheld device for use with the DTS PC application. To view this screen, click Settings→Handheld Configuration.

First, select your handheld from the list by clicking on the handheld’s name. If your handheld is not listed, choose either “Generic Windows CE” or “Generic Windows Mobile 5”, depending on your handheld’s operating system.

Next, click on the “Install Handheld Application” button. This button will be disabled if there is no handheld connected to the computer, or if Windows Mobile Device Center is not open. Handheld will install to handheld automatically. Click “yes” to any default install locations.

## ADMIN

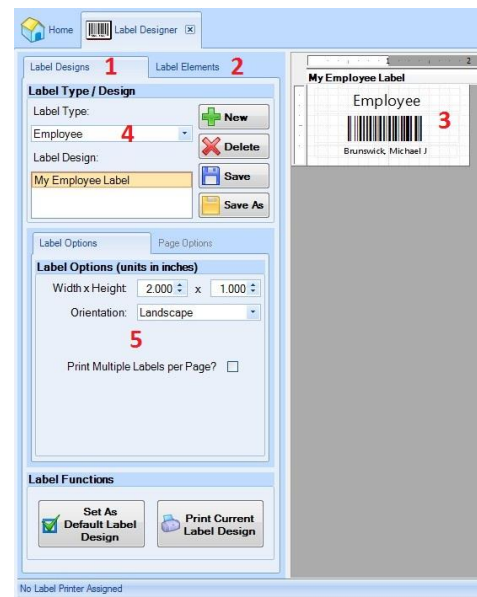
### LABEL DESIGNER

The label designer process is used to design labels for the various process in the system that print barcode labels.

Because the DTS system uses unique items types, the label designer allows users to create unique labels for each item type and location type individually. To access the label designer, click Admin→Label Designer.

#### LABEL DESIGNER SETUP

1. The 'label designs' tab brings you to several label and page options.
2. The 'label elements' tab gives you a list of text, barcode, and shape/image options for the current label type.
3. On the right-side of the screen, the current label design is shown. When adding label elements to the label, they will appear here.
4. Clicking the label type drop-down will give you access to generic employee, item, and location labels, but also to item types and location types you have entered.
5. The label options box allows you to alter orientation, width, and height. If you check the 'Print Multiple Labels per Page' checkbox, you will be able to select the 'page options' tab, which gives you settings for multiple label printing. Below this section, the "default label and print" button will allow you to set the label to the default, or print the design.



#### CREATING A LABEL

To actually create a label, first select the label type on the 'label' designs tab. Once you select a label type, the label on the right will go blank if there is no default label, such as with any item-type or location-type labels. Employee, location, and item will each have a default label.

After your label type is created, select your width and height, which should match whatever label type you have loaded in your label printer as well as your label printer's preferences. If a regular printer is assigned as your label printer, you may have to adjust the margins to get a proper label.

Once label options have been set, click the 'label elements' tab to begin adding elements to your label on the right. There are three tabs (text, barcode, and shape/image). These tabs determine the font that goes onto the label—either font that is readable with the human eye, or font readable with a barcode scanner.

#### Text

The elements listed in the 'element data source' are elements available to be added to the current label type. Any non-data-bound items will prompt a text box, and the text that you enter will be added to the

**Text Font (click to change)**

Font: Segoe UI  
 Size: 8  
 Style: Regular

label. The 'center' checkbox allows users to center elements added to the label. In addition, users can add a border with a specified border width. Selecting a data-bound element will add the item to the label. For example, if the element data source 'location barcode' is added to the label, it will show the actual label text upon printing, since the text tab was selected.

**Barcode**

Selecting the barcode tab and adding elements to the label design will add elements readable by barcode-scanner to the design. The type of barcode and size can be selected before adding the barcode to the label.

**Barcode Type / Size**

Type:  
 Code128A (1D, Alphanumeric)

Size:  
 16

**Shape/Image**

**Shape / Image Type**

Square / Rectangle  
 Horizontal Line  
 Vertical Line  
 Image

The system allows users to add various shapes/images to a label design. Select an element from the list (square/rectangle, vertical line, horizontal line, or image) and then click the "add to label" button to add it on the label design.

Once you are done adding elements to the label, click on the 'label designs' tab and then click on the "set as default label design" button in the label functions section at the bottom. Then, select the "save" or "save as" button to save your label design.

To print a label for an employee, item, or location, go to the corresponding tab. Select the employee, item, or location for which you want to print a label and right-click. From the drop-down menu, select "print label for..." and it will be sent to your label printer.

**ACCESS GROUPS**

Employees are people that will need to log into the DTS system or people to whom documents and items can be assigned. Before entering employees, you must create access groups. By creating access groups and assigning various employees to each group, you have control over what the users can and cannot do within the application.

<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>		
Name	Description	Status
Administrator	Full Rights to Application	
Secretarial	Data Entry and Transfer	
Partner	Full Rights to all DTS Features	
Associate	Audit Lead- General Audit Functions	
Intern	Portal Access Only	

By default, only one access group is created--administrator. This access group has full access to the entire program. You will be unable to delete this access group from the DTS system. In addition, you will not be able to remove the admin login from this group. You can change the bar code, password, first and last names of the admin login.

You can create any number of access groups without limit to how many people you can assign to each access group.

## EMPLOYEES



Employee	Barcode	Access Group	Status
ADMIN ADMINUSER	ADMIN	Administrator	
Carl Bass	E002	Associate	
Thomas Bauer	E003	Intern	
Michael Lowther	E001	Partner	
Jennifer Stevenson	E004	Secretarial	

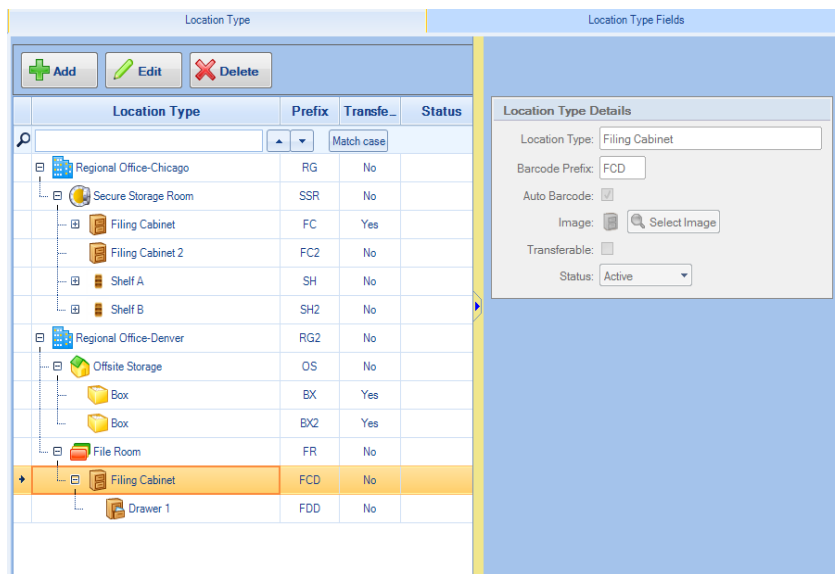
Once access groups have been established, you will be able to create and assign employees/users to these access groups via the Admin→Employees screen.

Begin by clicking the “add” button, and the add/edit details panel will appear on the right side of the screen. Enter in a barcode, first name, last name, and then select an access group. The login and password should only be entered if the employee/user will be given access to DTS on the PC. If you do not enter a login and password for the employee, you can still check out items to him/her, however they will not be able to log in to the PC.

## CUSTOM IMAGES

The system allows users to create custom images that tie to the various item and location types. These custom images help to distinguish between the various types. DTS comes with various images for employees, locations, and items; however other images can be added in for use in the system. To access these images, select Admin→Custom Images.

## LOCATION TYPE




Location Type	Prefix	Transfe...	Status
Regional Office-Chicago	RG	No	
Secure Storage Room	SSR	No	
Filing Cabinet	FC	Yes	
Filing Cabinet 2	FC2	No	
Shelf A	SH	No	
Shelf B	SH2	No	
Regional Office-Denver	RG2	No	
Offsite Storage	OS	No	
Box	BX	Yes	
Box	BX2	Yes	
File Room	FR	No	
Filing Cabinet	FCD	No	
Drawer 1	FDD	No	

**Location Type Details**

Location Type: Filing Cabinet

Barcode Prefix: FCD

Auto Barcode:

Image: 

Transferable:

Status: Active

In order to enter actual locations into the system, you must first have a location type. The location type establishes a template used to enter actual locations. The location types are set up as a hierarchy in a parent-child format. To begin entering location types, select Admin→Location Types.

Before creating location types, you should take into consideration how many buildings, rooms, locations, and

people that will be assigned items. You can make the hierarchy as simple or as complex as you want, but it is difficult to change once created. To design a good hierarchy, plan it out beforehand.

Start by clicking the “add” button to expand the add/edit panel. Once it is expanded, it will come up with the details at the right. You must enter a location type, a barcode prefix, select a custom image, and check if you want it to be transferable. When entering a new location type, it will automatically default the status to being active. **\*NOTE:** The barcode prefix is a set beginning to a barcode, so every location of that type starts with the same barcode.

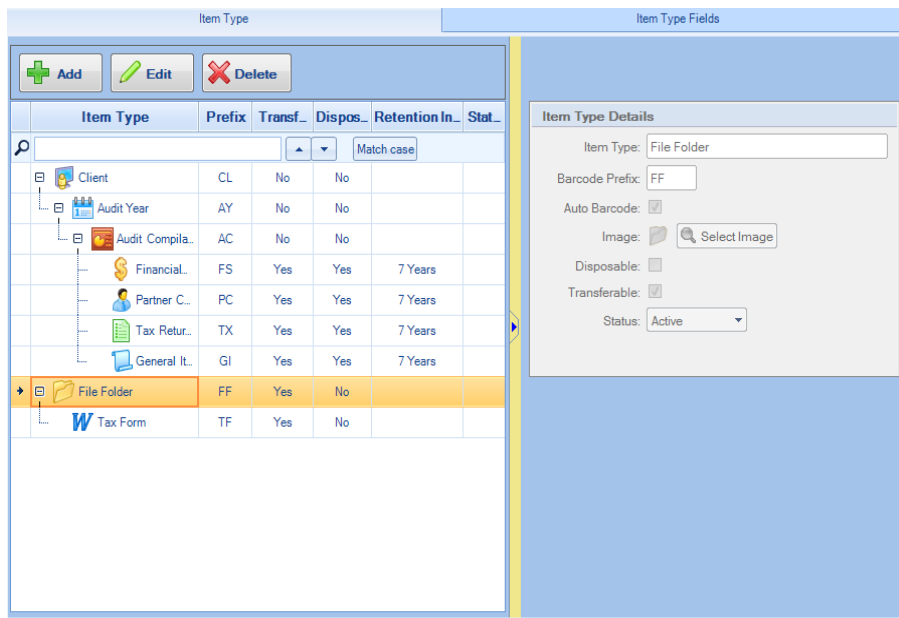
After creating the first location type, you can add a child below it. Click “add”, then “add child”. Then add the location type details for that child. You are allowed to assign any child to any parent above it, as long as it is a transferable location. Remember these are not actual locations, but location types.

## LOCATION TYPE FIELDS

Type fields are optional fields that can be added to a specific location type, as either mandatory or optional fields to be entered. When you create that location, you will see the fields in the add/edit panel.

To create a new location type field, go to the second tab, ‘location type fields’ and click “add”. When the panel expands, the image at the right will appear. You will be prompted to pick the field type, type the field name, and check if this information is required when adding an actual location to the system.

## ITEM TYPE



Item Type	Prefix	Transf.	Dispos.	Retention In..	Stat..
Client	CL	No	No		
Audit Year	AY	No	No		
Audit Compila..	AC	No	No		
Financial..	FS	Yes	Yes	7 Years	
Partner C..	PC	Yes	Yes	7 Years	
Tax Retur..	TX	Yes	Yes	7 Years	
General It..	GI	Yes	Yes	7 Years	
File Folder	FF	Yes	No		
Tax Form	TF	Yes	No		

The detailed view for 'File Folder' shows the following fields:

- Item Type: File Folder
- Barcode Prefix: FF
- Auto Barcode:
- Image:  Select Image
- Disposable:
- Transferable:
- Status: Active

The item type hierarchy works similarly to the location hierarchy. In order to enter actual items into the system, you must first have an item type. The item type establishes a template used to enter actual items. The item types are set up as a hierarchy in a parent-child format. To begin entering item types, select Admin → Item Types.

Before creating item types, you should take into consideration how many items and objects that you will be tracking. You can make the hierarchy as simple or as complex as you want, but it is difficult to change once created. To design a good hierarchy, plan it out beforehand.

Start by clicking the “add” button to expand the add/edit panel. Once it is expanded, it will come up with the details at the right. You must enter an item type, a barcode prefix, select a custom image, and

check if you want it to be transferable or disposable. When entering a new item type, it will automatically default the status to being active. **\*NOTE:** The barcode prefix is a set beginning to a barcode, so every item of that type starts with the same barcode.

After creating the first item type, you can add a child below it. Click “add”, then “add child”. Then add the item type details for that child. You are allowed to assign any child to any parent above it, as long as it is a transferable item. Remember these are not actual items, but item types.

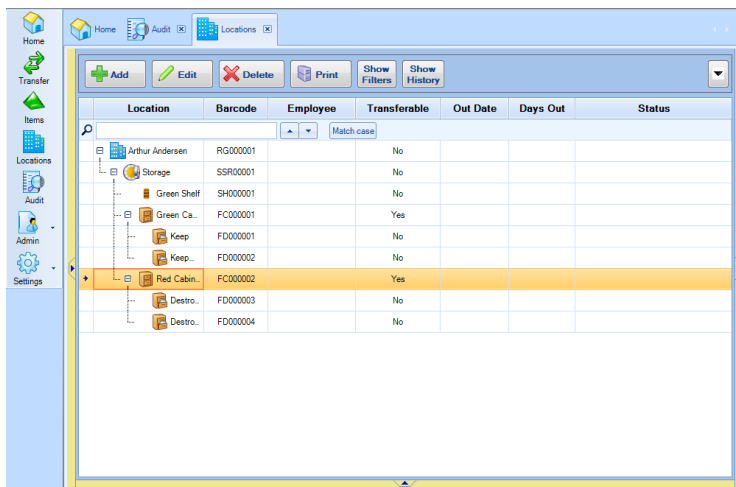
## ITEM TYPE FIELDS

Type fields are optional fields that can be added to specific item types, as either mandatory or optional fields to be entered. When you create that item, you will see the fields in the add/edit panel.

To create a new item type field, go to the second tab, ‘item type fields’ and click “add”. When the panel expands, the image at the right will appear. You will be prompted to pick the field type, type the field name, and check if this information is required when adding an actual item to the system.

## MANAGING INFORMATION

### LOCATIONS



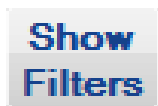
Location	Barcode	Employee	Transferable	Out Date	Days Out	Status
Arthur Andersen	RG000001		No			
Storage	SSR00001		No			
Green Shelf	SH000001		No			
Green Ca.	FC000001		Yes			
Keep	FD000001		No			
Keep..	FD000002		No			
Red Cabin..	FC000002		Yes			
Destro.	FD000003		No			
Destro.	FD000004		No			

Once location types have been entered, you can begin to enter actual locations. These are the actual buildings, rooms, shelves, etc. that you are going to be tracking documents between. On the main menu bar, select “locations”.

To add a new location, press the “add” button on the function bar. On the right side of the screen a panel will appear. From the drop-down menu, select the location type to which you will be adding an actual location. **\*NOTE:** You

must first add to the highest parent in the hierarchy, before adding anything to the lower children.

### SHOW FILTERS



The filters panel can be used when you want to filter information in the data grid by general filters, retention filters, item types, or location types (depending on the tab you are in).

To access the filters panel, you can select the yellow arrow on the left side of the screen, or you can click “show filters” button at the top of the screen.

When selected to view, the panel will expand from the left. Depending on what is selected for the ‘filter by’ option, you will be prompted to type in the search field or select from a drop-down menu.

## SHOW HISTORY



The history panel is used when you would like to show the history of the selected location on the current screen. To access the history panel, you can select the yellow arrow at the bottom of the screen, or you can select “show history” button at the top of the screen.

When selected, the bottom panel will come up, splitting the screen. When using the history panel, the data will reflect the location highlighted in the top panel. The top panel will list the actual locations in your database.

## ITEMS

Items (13)	Barcode	Created D.	Employee	Location	Days	O.	Retention	Retenti.	Dispo.	Destru.	Stat.
Enron	CL000002	8/10/2001								No	
2001	AY000001	10/8/2001								No	
Enron Corp.	AC000001	10/8/2001								No	
Enron In.	FS000001	10/8/2001	Bauer,Thom...		60	8/..		7 yr.		Yes	
Enron B.	FS000002	10/8/2001	Bauer,Thom...		60	8/..		7 yr.		Yes	
Enron P.	PC000001	10/8/2001		Destroy Year E.	74	8/..		7 yr.		Yes	
Enron F.	TX000001	10/8/2001	Bass,Carl		69	8/..		7 yr.		Yes	
Enron St.	TX000002	10/8/2001		Destroy Year E.	74	8/..		7 yr.		Yes	
Enron O.	PC000002	10/8/2001		Destroy ASAP	74	8/..		7 yr.		Yes	
Auditor	GI000001	10/8/2001		Keep Watch	74	8/..		7 yr.		Yes	
Waste Management	CL000003	8/10/2002								No	
Sunbeam	CL000004	8/10/2002								No	
WorldCom	CL000005	8/10/2002								No	

Once an item-type hierarchy has been established, you can enter the actual items that will be tracked and transferred between locations and employees. Items work the same way that locations do—many items can be assigned to a single item type, but each one will be unique and have a unique barcode. On the main menu bar, select “items”.

To add a new item, press the “add” button on the function bar. On the right side of the screen a panel will appear. Type the item name, select its assignment (employee, location, or none), the date it was created, the retention date, the destruction date, any pertinent notes, and the status (defaults to active).

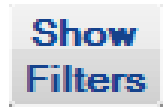
**\*NOTE:** The option to select an item’s assignment only appears upon adding a brand new item. If upon adding you opted to set the item assignment at “none” and then wanted to add a location/employee, you will not be able to add the information here. Instead, you would need to use the “transfer” button to move the employee/location to where you want it assigned.

## CUT AND PASTE

While on the items page, you have the option to cut and paste any child to any parent. To cut a child item, right click on the item and select “cut item...(move item to new parent)”. Once you do this, you will receive a confirmation box and then a gray area and yellow border will appear around the item, signifying that it has been cut.

To paste the item, select a parent item, and then right click and select “paste”. After selecting “ok”, the child item will be transferred to the new parent. Any employee assignments or any current settings will be transferred to the new parent.

## SHOW FILTERS



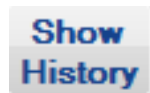
The filters panel can be used when you want to filter information in the data grid by general filters, retention filters, item types, or location types (depending on the tab you are in).

To access the filters panel, you can select the yellow arrow on the left side of the screen, or you can click “show filters” button at the top of the screen.

When selected to view, the panel will expand from the left. Depending on what is selected for the ‘filter by’ option, you will be prompted to type in the search field or select from a drop-down menu.

The operation field allows you to select either “and” or “or”. If you select “and”, and multiple filters are added, an item must match all of the criteria entered for the search to appear in the grid. If “or” is selected, and multiple filters are added, an item can match the criteria but doesn’t necessarily need to meet every filter.

## SHOW HISTORY



The history panel is used when you would like to show the history of the selected item on the current screen. To access the history panel, you can select the yellow arrow at the bottom of the screen, or you can select “show history” button at the top of the screen.

When selected, the bottom panel will come up, splitting the screen. When using the history panel, the data will reflect the item highlighted in the top panel. The top panel will list the actual items in your database.

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## AUDIT

Audits are performed with the handheld, and cannot be done on the PC alone. The audit function is used to take inventory of where or with whom items are located. See the Handheld section of this manual for information regarding the audit feature.

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## TRANSFER

Transfer is the function used to move documents or items from one employee/location to another. This function will be the primary tool for managing information, assigning items to employees/locations, and assigning employees to locations, with the intent of that individual tracking items at that location. To transfer items of documents, select “transfer” on the main menu bar.

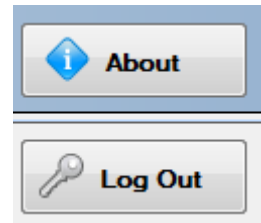
Transfer can work in a variety of ways. Transfer can assign items to employees, or assign employees to locations, rendering them in charge of all items currently at this location. To transfer an item to a location/employee, first enter the employee/location barcode in the “transfer to” textbox. Then enter the item barcode in the next field. Clicking the “transfer” button will assign the items.

## ADDITIONAL FUNCTIONS

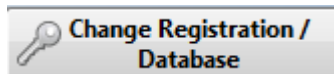
There are several other functions built into DTS that are not always used. This section will outline their functionality and provide information on them.

### ABOUT SCREEN

To get to the About screen, click on the “Home” button and then click on “about”. Your version, customer identification, and number of licensed users will appear. There are two buttons available on this screen: “Change registration/database” and “check for update”.



### CHANGE REGISTRATION/DATABASE



After clicking this button on the About screen, a dialogue box will appear containing your customer identification and license key, which is explained earlier in this manual. To change the registration, simply enter in the new information provided by GigaTrak.

### CHECK FOR UPDATE

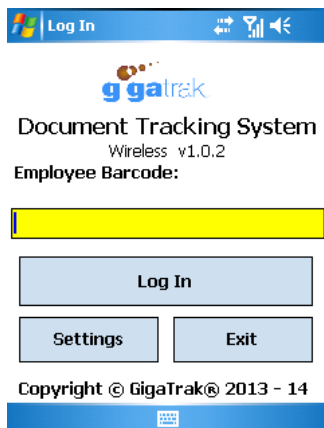
Clicking the “check for update” button will query the GigaTrak server. If an update is available, it will automatically download any available database updates or PC updates and apply them.



## HANDHELD APPLICATION

The following describes the basic operation of the mobile Document Tracking System 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. If the barcode does not match an employee in the data file, the user will not have access to the application.

The user barcode is tied to the records recorded by the handheld. If a different employee uses the handheld he/she should enter their own barcode before recording records. To change the user barcode, select “log out” and enter a different employee barcode.

## TRANSFER

The transfer function is used to assign documents and other items to employees/locations, or to assign employees to various locations.

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

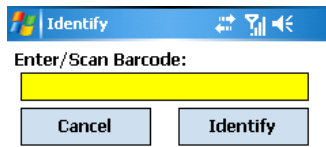
Then scan the item or location barcode that is being assigned. If the barcode matches a record in the data file, the appropriate name will be displayed under the successful transfer box.

## AUDIT

Audits are performed with the handheld, and cannot be done on the PC alone. The audit function is used to take inventory of where or with whom items are located. On main screen, select “audit”.

Scan the barcode of the employee/location/item for which you want to run the audit. The screen will change and prompt for the user to scan the barcodes of the items in the audit. Scan each item as you locate them. Hitting the “reset” button will clear data from the screen; documents and items that were audited will have been saved. When the audit is completed, a notification box will alert the user that the audit has been completed. Clicking “ok” will return the user to scan another employee/location/item barcode to run a new audit. Hitting the “back” button will return the user to the main screen.

## IDENTIFY



Identify

Enter/Scan Barcode:

Cancel Identify

The identify function is used to display the description of a document/item when the barcode is scanned. It will also show the last known location/employee that had it. This function is a look-up only function and does not have any data.

Back

## SUPPORT

GigaTrak provides 90 days of telephone support for DTS, beginning on the date of purchase. GigaTrak will advise on installation issues, however the customer is largely responsible for network and SQL Server installation. Hours for support are 9:00AM-5:00PM CST, Monday-Friday. During this time, you are entitled to any updates or new releases issued by GigaTrak. By purchasing an extended support agreement, these services are also extended. Onsite support is available at additional cost. Please contact support via e-mail at [support@gigatrak.com](mailto:support@gigatrak.com) or via telephone at 262-657-5500 ext. 2 with any questions.