VERSION 1.7.0

gigatrak®

DOCUMENT TRACKING USER MANUAL

CONTENTS

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. See Access Groups in this Manual for more information.

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. See Employees in this Manual for more information.

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. See Location Type in this Manual for more information.

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. See Item Type in this Manual for more information.

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. See Custom Images in this Manual for more information.

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. See Locations in this Manual for more information.

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. See Items in this Manual for more information.

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. See Printer Assignment in this Manual for more information.

LABEL DESIGNER

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 more information.

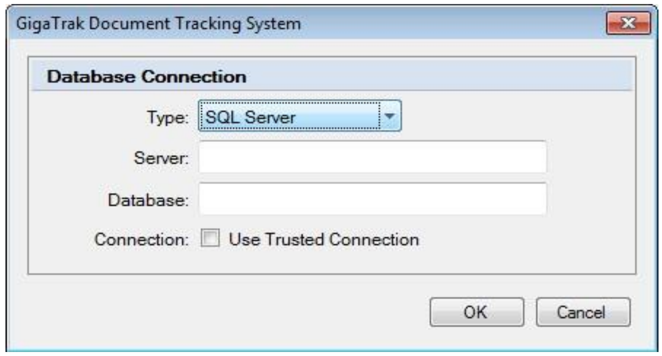
Once you have set up your initial data, you are ready to begin using DTS. Transfer documents and items to employees or locations and keep a complete history of chain of custody. Be diligent on usage, and the Document Tracking System will provide reliable tracking for all of your documents and items!

Backup your database daily!

GETTING STARTED

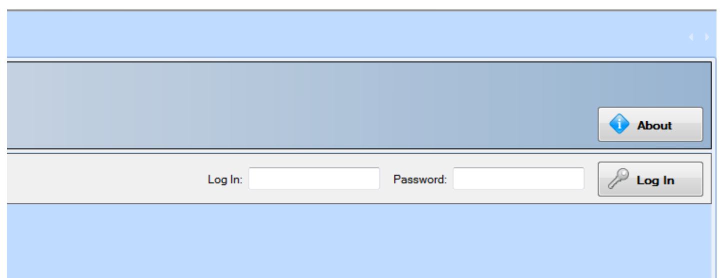
CONNECTING TO DATABASE

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.

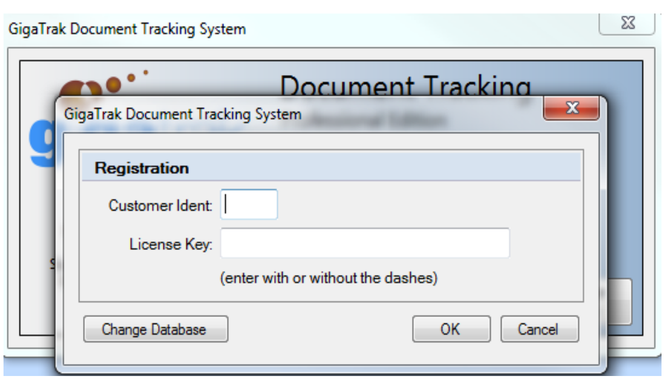


Username: admin

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



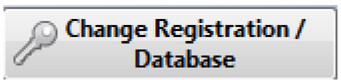
The registration process is used to assign a registration/license key to the program and the database. When the program is purchased, GigaTrak will provide the 4-digit Customer Identifier and the 16-digit License Key. Access to this screen is only available when the Admin login is used.

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.

ABOUT SCREEN

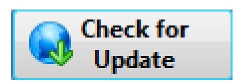
To get to the About screen, click on the “Home” button and then click on “about”. Your version, customer identification, and number of licensed users will appear. There are two buttons available on this screen: “Change registration/database” and “check for update”.

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. To change the database, then select change database. Choose the type of database you will be using with the drop down menu at the top. You will then be prompted to list the server name and database name if using an SQL Database or the location if using an Access Database. When entering the SQL Server Name or IP Address, if you are using a named instance, add it with a backslash (example: myserver2\SQLExpress).

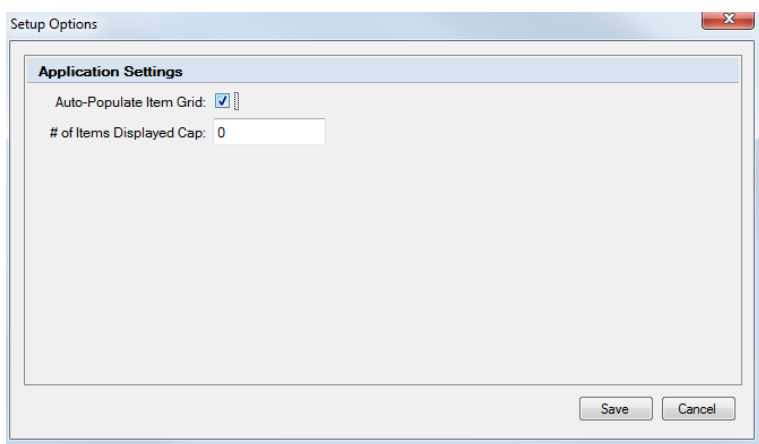
CHECK FOR UPDATE



Clicking the “check for update” button will query the GigaTrak server. The system will connect to a GigaTrak server to search for an update to the system. If an update is available, the system will begin the download process. Major updates may require you to contact GigaTrak and receive a special download. **You must have a current Support Agreement in place in order to download updates.**

SETTINGS

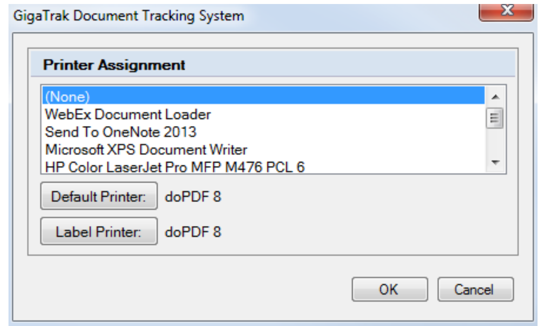
SETUP OPTIONS



There are two options in the Setup Options menu. The first option is “Auto-populate Item Grids”. 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 documents will be shown in the grid.

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.

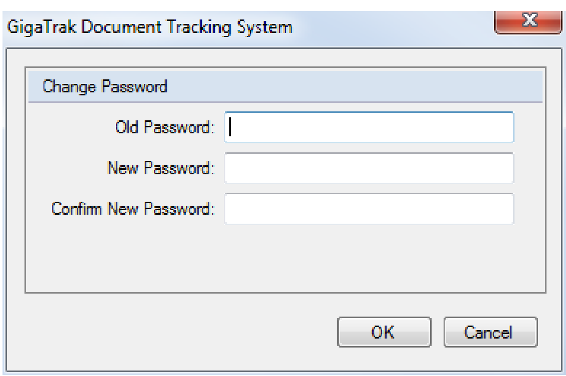
The available printers list will display all the printers currently on the Windows printer list. If you cannot find the printer you are looking for, check to make sure the printer is installed on your computer.

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.

CHANGE PASSWORD



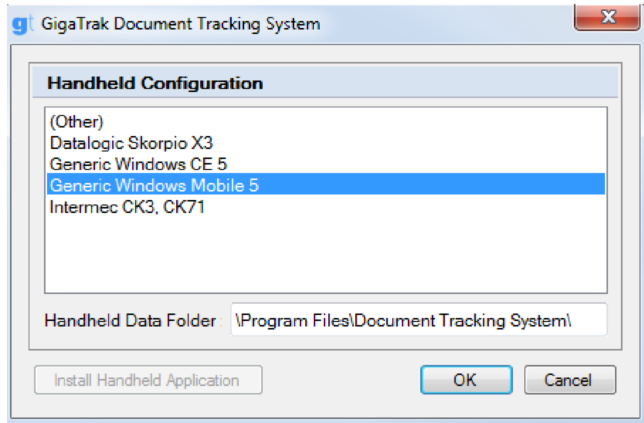
A user currently logged into DTS may change their password at any time. Select Settings→Change Password and the screen at the left appears.

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.

HANDHELD CONFIGURATION

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



To install DTS to a handheld, follow the steps below:

1. Connect Handheld to the PC via Active Sync or Windows Mobile Device Center
    a. If handheld is not connecting through Active Sync or Windows Mobile Device Center or Active Sync or Windows Mobile Device Center is not installed, please see Communication With Host PC.
2. Select Handheld Device
3. Select Install Handheld Application
4. Sync the handheld with the database. For see Settings/Wireless Setup under DTS Mobile Handheld Application

See DTS Mobile Handheld Application in this Manual for more information about handheld devices and features.

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.

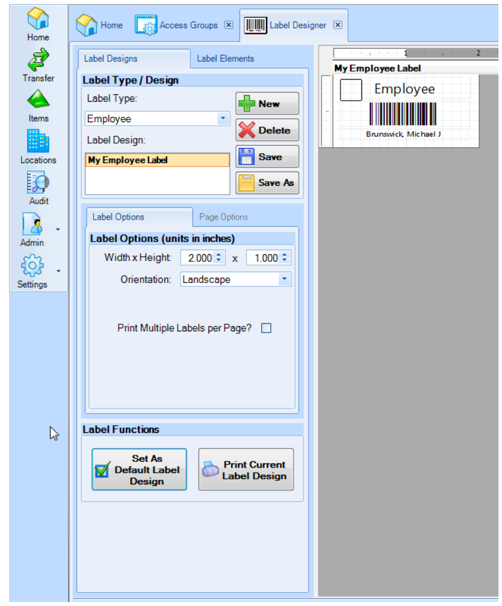
Next, click on the "Install Handheld Application" button. This button will be disabled if there is no handheld connected to the computer, or if Windows Mobile Device Center is not open. Handheld will install to handheld automatically. Click "yes" to any default install locations.

ADMIN

LABEL DESIGNER

The Label Designer allows you to format a label for Employees, Containers, Locations, and Packages. Any number of designs can be created, but only one can be the "Default Label Design" for each type. To access the label designer, click Admin→Label Designer.

LABEL DESIGNS



The Label Designs tab of the Label Designer is made for viewing, adding, deleting and saving label designs for different label types.

Label Type/Design

Select the Type of label you wish to view by using the drop down menu. Select which of those designs you would like to view select the design below or click new to add a new design of that type. Select Save to save changes to that design. Use save as to save a copy of the current design under a different name. To delete the current design, click the delete button. The current default label with be bolded. If no label design is bolded for that label type, please select a default label for that type. Please see Label Functions for instructions on setting a default label design.

Label/Page Options

Use this to set the size and orientation of the label. If printing multiple labels on one page select the Print Multiple Labels per Page and the Page Options tab will be unlocked. In Page option you can change the spacing between labels as well as how many columns of rows you would like to print.

Label Functions

The Label Functions hold two key buttons: Set As Default Label Design and Print Current Label Design. Set As Default Label Design will set the current selected design as the default for that type of label. So if a label is printed for that type it will be printing based on that design. Print Current Label Design will print a sample label so that you can see what the label will look like.

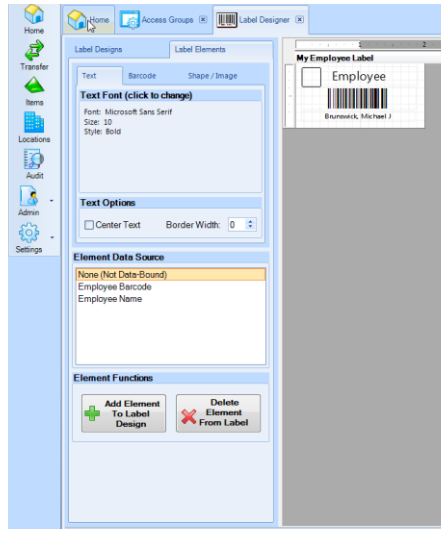
LABEL ELEMENTS

The Label Elements tab of the Label Designer is made for add, editing and removing elements of a label.

Text

Select the Text tab in the Label Elements panel. Select the type of text you would like to use in the Data Source box, press Add Element To Label design and type a label caption in the Value Required textbox if using a data source marked (Not Data-Bound).

Right clicking on a text element will give you some extra options to apply to that element. You can change the size, center the text in its bounding box, edit the text if using a data source marked (Not Data-Bound), add a border around the bounding box or change the color.



Barcode

Select the Barcode tab in the Label Elements panel. Select the type of barcode you would like using the drop down menu called Type. Select the type of text you would like to see as a barcode in the Data Source box, press Add Element To Label design and type a label caption in the Value Required textbox if using a data source marked (Not Data-Bound).

Right clicking on a barcode element will give you some extra options to apply to that element. You can change the size, center the barcode in its bounding box, edit the text of the barcode if using a data source marked (Not Data-Bound), add a border around the bounding box or change the color.

Delete Element From Label Design

Select the element of the barcode you wish to remove and click the Delete Element From Label Design button and it will be removed from the current label design.

Shape/Image

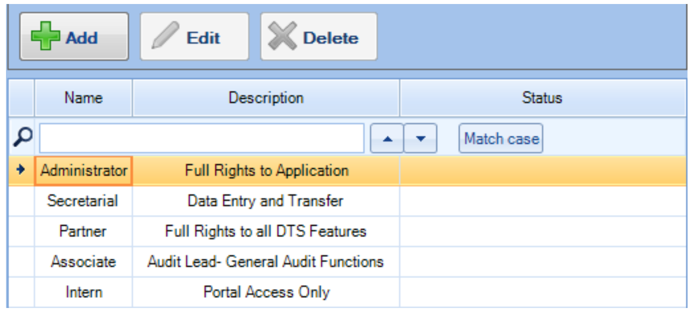
Select the Shape/Image tab in the Label Elements panel. Select the type of Shape/Image you would like and press Add Element To Label design.

Right clicking on a Shape/Image element will give you some extra options to apply to that element. You can change the size, center the element in its bounding box, add a border around the bounding box/ change the thickness of the line or change the color.

For images, when you click the Add Element To Label Button and have the (Not Data-Bound) selected. You will be prompted to select the photo file from your computer. File formats accepted are .bmp, .gif, .jpg, .png and .tif.

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.



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. Each access group must have a unique name.

To delete an access group, select the delete button. The system will not let you delete an access group if there is historical data tied to it. Set the access group to inactive to prevent further use and still retain the historical data tied to the access group.

EMPLOYEES

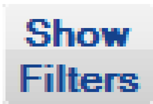
Once access groups have been established, you will be able to create and assign employees/users to these access groups via the Admin→Employees screen.

By clicking the “add” button, 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.

To delete an employee, select the delete button. The system will not let you delete an employee if there is historical data tied to it. Set the employee to inactive to prevent further use and still retain the historical data tied to the employee.

The print button allows you to print reports, labels and export information to an excel sheet based on the employees as a whole or by a single employee.

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 ITEM/LOC

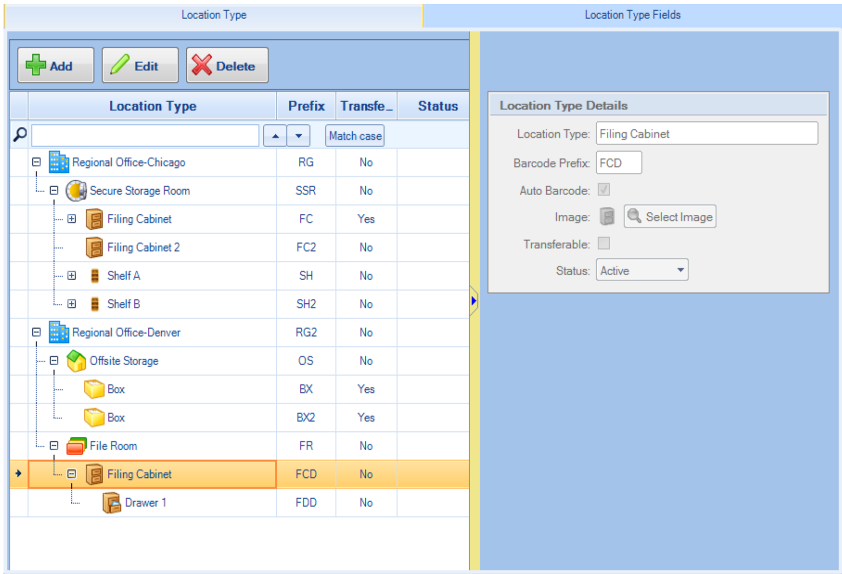
The item/loc panel is used when you would like to show the items and locations assigned to the selected employee on the current screen. To access the item/loc panel, you can select the yellow arrow at the bottom of the screen, or you can select "show item/loc" button at the top of the screen.

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

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. To add an image select add and then Find Image. Once you have found the image on your computer through the popup window select it and then select save. Images that are tied to records cannot be deleted from this list.

LOCATION TYPE



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.

To delete a location type, select the delete button. The system will not let you delete a location type if there is historical data tied to it. Set the location type to inactive to prevent further use and still retain the historical data tied to the location type.

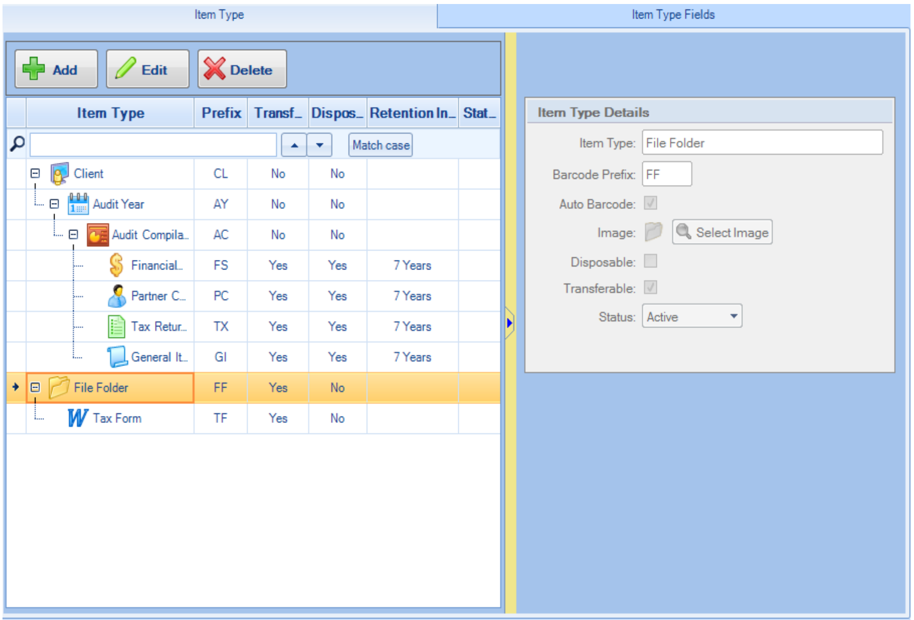
After creating the first location type, you can add a child below it. Click “add”, then “add child”. Then add the location type details for that child. You are allowed to assign any child to any parent above it, as long as it is a transferable location. Remember these are not actual locations, but location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



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.

To delete an item type, select the delete button. The system will not let you delete an item type if there is historical data tied to it. Set the item type to inactive to prevent further use and still retain the historical data tied to the item type.

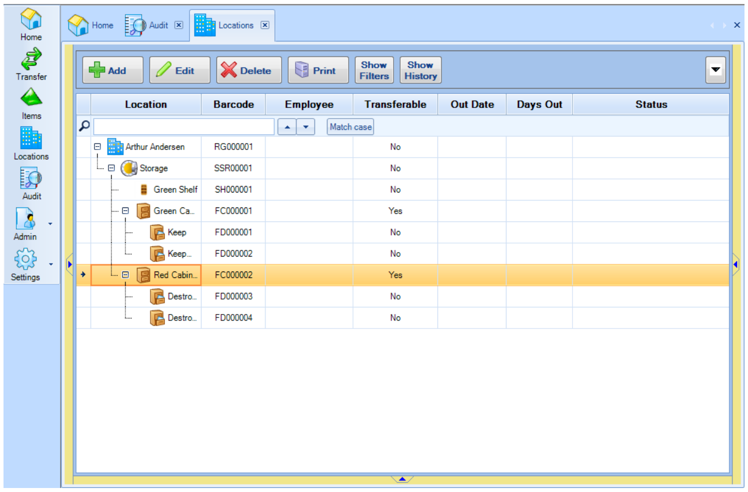
After creating the first item type, you can add a child below it. Click “add”, then “add child”. Then add the item type details for that child. You are allowed to assign any child to any parent above it, as long as it is a transferable item. Remember these are not actual items, but item types.

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.

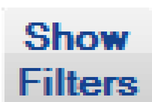
LOCATIONS



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 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.

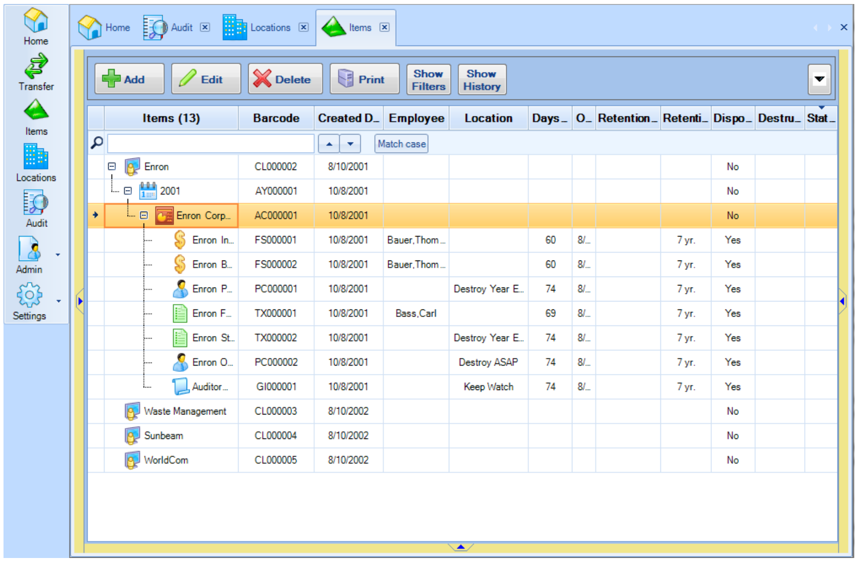
When selected to view, the panel will expand from the left. Depending on what is selected for the 'filter by' option, you will be prompted to type in the search field or select from a drop-down menu.

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



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. Select the Item type, 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

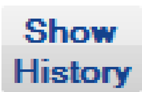
The filters panel can be used when you want to filter information in the data grid by general filters, retention filters, item types, or location types (depending on the tab you are in).

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



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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.

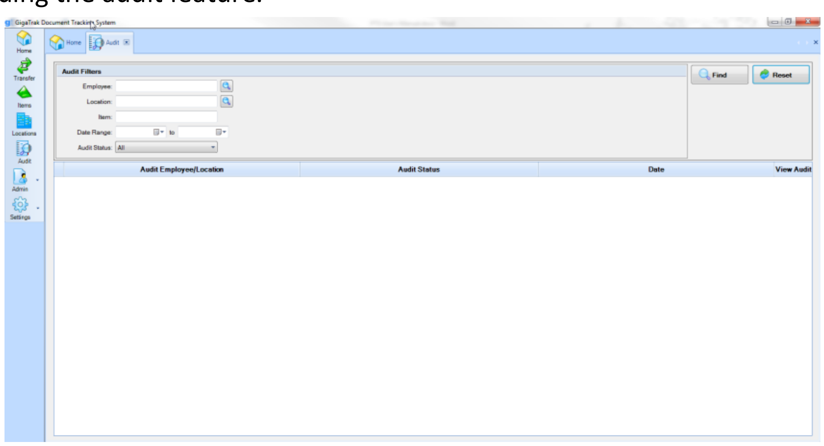
TRANSFER

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.

AUDIT

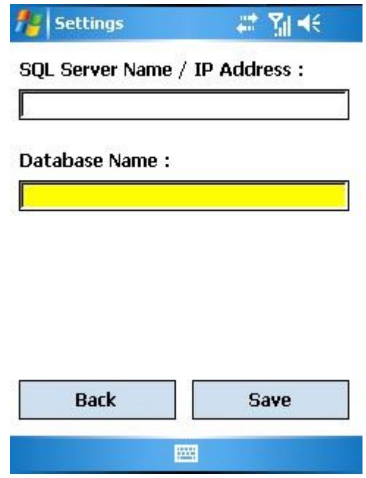
Audits are performed with the handheld, and cannot be done on the PC alone. The audit function is used to take inventory of where or with whom items are located. The pc audit page allows you to filter, sort and view audits that were taken on the handheld. See the Handheld section of this manual for information regarding the audit feature.



DTS MOBILE HANDHELD APPLICATION

The following describes the basic operation of the mobile Document Tracking System application.

SETTINGS/WIRELESS SETUP



Once the app is installed, to use it, there is one more step to installing.

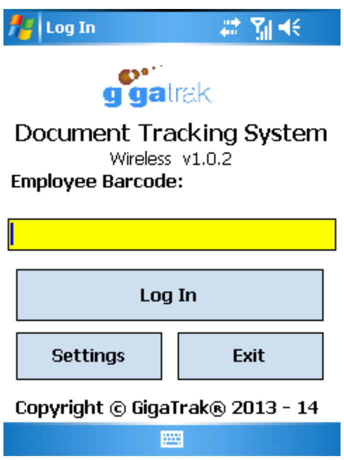
The settings function will unlock information to connect your handheld to the database wirelessly. To use the app the handheld must be used on the same network as the SQL Server.

To access the admin function, select "settings" on the main menu. The application will prompt you for a password which is: gigadocs

The screen will then prompt users for a SQL Server Name/IP Address and a Database Name. By entering this information, the handheld will be able to connect to the correct database.

Click "save" to store the information and exit the Admin screen.

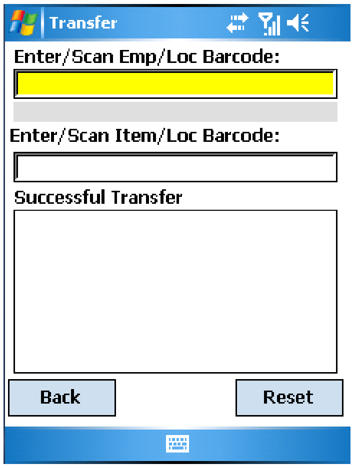
LOGIN



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 ID 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 to log in again.

TRANSFER



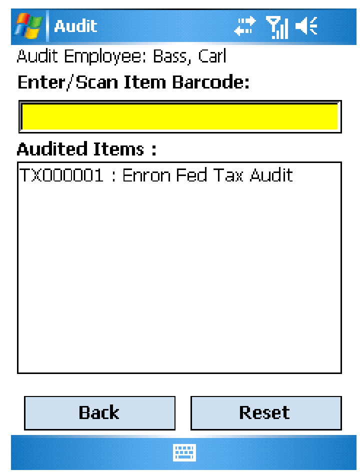
The transfer function is used to assign documents and other items to employees/locations, or to assign employees to various locations.

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

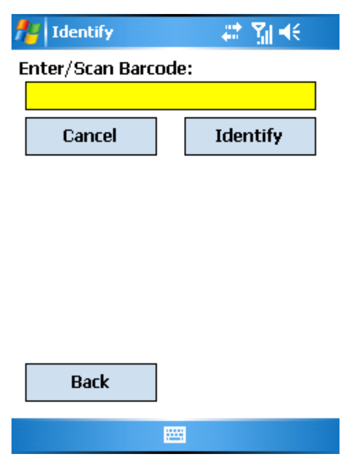
Audits are performed with the handheld, and cannot be done on the PC alone. The audit function is used to take inventory of where or with whom items are located. On main screen, select “audit”.



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

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 record any data.



SUPPORT

GigaTrak provides 90-days of telephone support for DTS 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 extension 2 with any questions.