VERSION 3.14.1

STORES TRACKING SYSTEM
USER MANUAL

STS USER MANUAL

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QUICK START OVERVIEW

Now that you have installed STS, 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 using STS for the first time.

COMPANY INFO, CARRIERS, AND SUPPLIERS

These functions are needed throughout the system for the setup of your company database and the tracking of inventory from different suppliers. It is recommended to get a good start on your carriers and suppliers early on for historical tracking purposes, and to streamline ordering of products by supplier. On the menu bar, select Support→Company Info/Carriers/Suppliers See Company Information, Carriers, Suppliers in this Manual for more information.

ACCOUNTS

This function allows you to enter account numbers to be used when checking out items from inventory. On the menu bar, select Support→Account. See Account in this Manual for more information.

INVENTORY LOCATIONS

This function allows the user to create locations where inventory is stored. Inventory locations must be set up since the Part Master requires them. On the menu bar, select Support→Inventory Locations. See Inventory Locations in this Manual for more information.

PART INFORMATION

This function allows the user to create Part Types and Standard Units of Measure for organizing your inventory. These items must be set up since the Part Master requires them. On the menu bar, select Support→Part Information. See Part Information in this Manual for more information.

USER AUTHORIZATION

This function allows users to be entered into the system. A user may be an individual that will be using the STS system, or a person to whom parts may be checked out. If the individual will be using the STS system, Access Rights to various system functions can also be set. On the menu bar, select File→User Authorization. See User Authorization 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 File→Printer Assignment. See Printer Assignment in this Manual for more information.

LABEL DESIGN

The system allows the user to design labels for receipts, locations, and parts. These labels typically have barcodes and can be used to check out inventory. Several sample label designs are included and can be modified. You must select a default label format in the Label Designer before printing is allowed. On the menu bar, select Labels→Label Designer. See Label Designer in this Manual for more information.

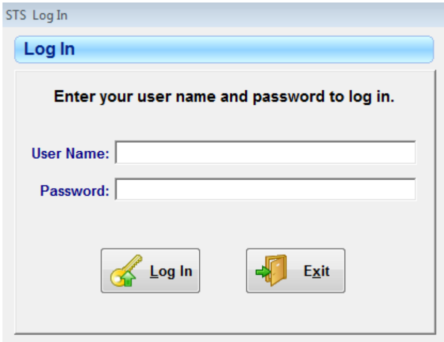
PARTS

The parts screen allows for the creation and maintenance of new part numbers, which are used throughout the STS system. You must enter items with “blue” prompts, including: part number, description, part type, UOM, and inventory location. It is recommended that you also enter the other information on the screen. On the main button bar, select the “Part” button. See Parts in this Manual for more information.

Once you have your initial data set up, you are ready to begin using the STS system. Monitor storeroom supplies, parts for sale, parts for repair, and general inventory items across multiple locations! Be diligent on how you use the system, and it will provide years of reliable tracking for all of your tools!

Backup your database daily!

GETTING STARTED



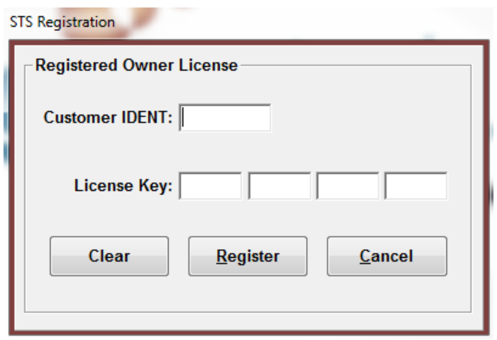
Upon opening the program, the screen at left will appear. You will be prompted to enter a User Name and Password. If it is the first time logging in, you will use the Admin User's login data:

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



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.

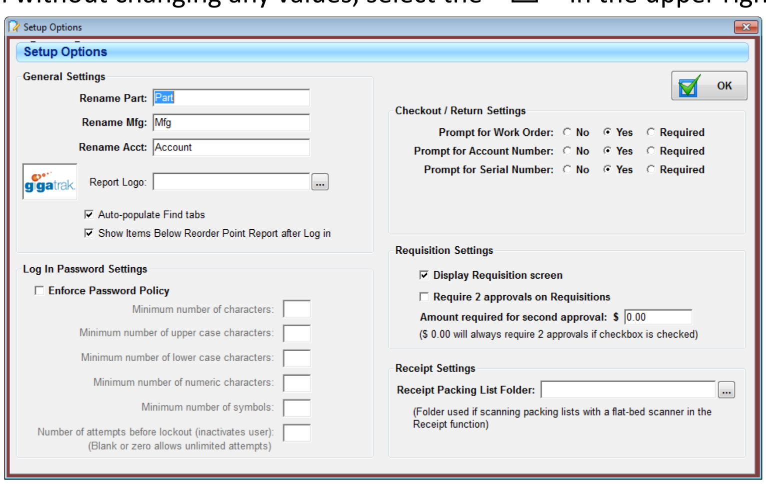
The 4 Digit Customer Identifer and 16 Digit Registration Key will be provided by GigaTrak upon purchase of your system.

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.)

To save the changes for this 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.



GENERAL SETTINGS

These options can be used to change the names of the parameters to fit your needs. This makes up the structure of the system. Part, Mfg and Acct 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 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.

When Auto-populate Find Tabs is 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.

By selecting Show Items Below Reorder Point Report after Log In option, the system will automatically display the report of any binned items below the reorder point immediately following log in.

LOG-IN PASSWORD SETTINGS

Log-In Password Settings applies to usernames and passwords created for the authorized users of the systems. By default, passwords are five (5) characters in length. In this section of the Setup Options, a new password policy can be enforced to add increased security to logins.

If you choose to **Enforce Password Policy**, you can set a Minimum number of characters, a Miminimum number of upper case characters, a Minimum number of lower case characters, a Minimum number of numeric characters, a Minimum number of symbols, and a Number of attempts before lockout (inactivates user).

CHECKOUT/RETURN SETTINGS

These settings allow the administrator to change the prompts used when checking out or returning items to/from inventory. If "No", the prompt will not be displayed. If "Yes", the prompt is shown but not required. If "Required", the user must enter the respective data before the checkout/return can be completed.

REQUISITION SETTINGS

Display Requisition, if check, will display the requisition tab in the main menu bar. Requisition settings determine approval levels when issuing a bid to suppliers. If the requisition exceeds a specific dollar level and the "Require 2 Approvals on Requisitions" is checked, the requisition must have the approvals completed to proceed with a purchase order.

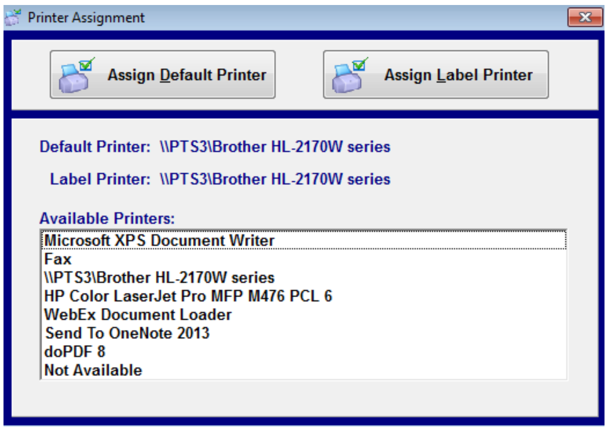
RECEIPT SETTINGS

The receipt settings allow users to tie a folder to the system for packing list storage. The folder can be created to store scanned copies of the suppliers' packing list upon receipt. This setting sets the folder location on the PC/Server.

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. Initially, the default printer will show “Not Available” and the label printer will show “Not Set”.

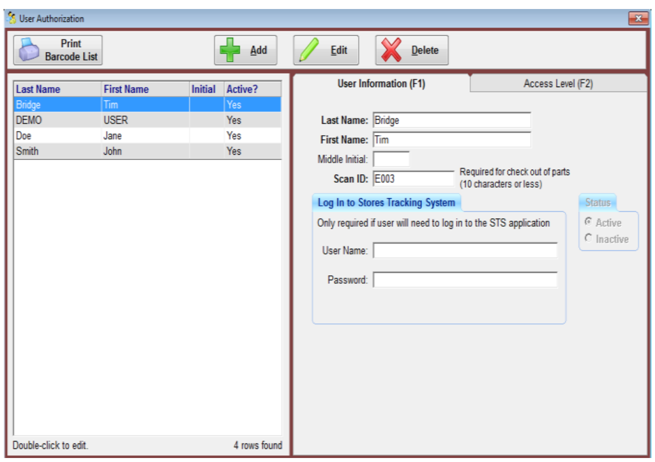
The Available Printers list will display all the printers that are on the Windows printer list.



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.

USER AUTHORIZATION



The User Authorization screen is used to manage employee access to STS and system functions. Click on File and select User Authorization to open the User Authorization screen.

A user must be listed on this screen, and have a valid username and password, in order to successfully log in to STS. At Log in, the user will have to enter his username and password on the log in screen. The values entered will be compared with those stored on this screen. STS will start and open if the values match. Upon initial setup, the only user will be the Admin user. You may Add, Edit, or Delete user information.

Users that will be checking out items from inventory must also be added to the system via this screen. The User ID is used in the checkout process to identify the person that items are being checked out to, and therefore is a required field.

All of the major STS functions are also protected by values set on this screen. Three values are available for each major function: Yes (full access), View (view only), and No (no access). These values set what that user can see when they are logged into the system via a pc terminal.

ADDING A NEW USER

Click the “add” button to add a new user to the system. When clicked, the “add” button will create a new line in the user’s grid. Type the last name of the new user in the Last Name field. Use the tab key to move to the First Name field. Type the first name and press the tab key again to move to the middle initial field. Continue entering user information in this manner. When you get to the function fields (receipts, transfer, etc.) use the enter key to change values from Yes, No, and View.

Click the “save” button when finished entering this user’s information to permanently store the values in STS. Click the “cancel” button if you wish to cancel entering the new user.

EDITING A USER

First, select the user whose information you wish to edit by clicking in the grid row for the user. Then click the “edit” button. Click in the field that contains the information that you wish to change and make the changes. Click the “save” button when finished changing this user’s information to permanently store the changes in STS. Click the “cancel” button if you wish to cancel editing the user’s information.

REMOVING A USER

First, select the user you wish to remove by clicking anywhere in the grid row for the user. Then click the “remove” button. A prompt will appear asking if you want to remove this user. Click the “yes” button if you want to remove this user; click the “no” button if you do not want to remove this user. If a user is involved in a history record, the system will not allow the user to be deleted. Set the Status to inactive to prevent further use.

PRINTING LABELS

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

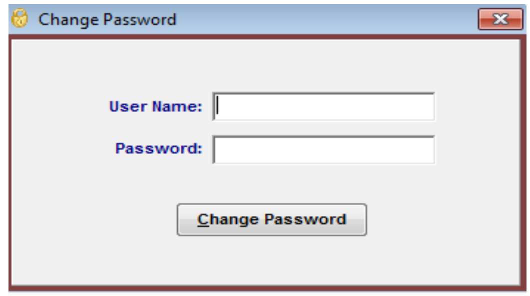
For label printing, multiple users may be selected. To select multiple users, do one of the following:

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

OTHER FILE MENU FUNCTIONS

CHANGE PASSWORD

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

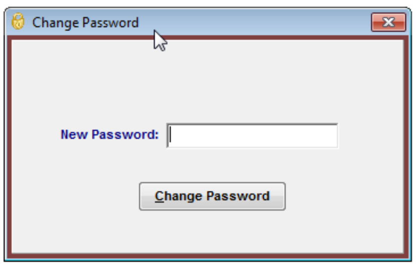


Type in your current user name and password and then select the Change password button.

Passwords must be between 5 and 10 characters long.

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

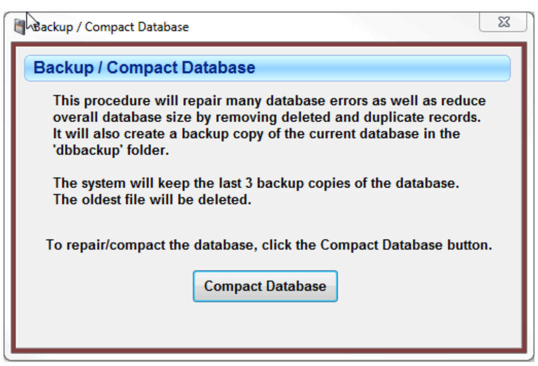
Type in your new password again. If the password matches the new password you typed earlier, the system will save the new password and the Change Password screen will disappear.



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.

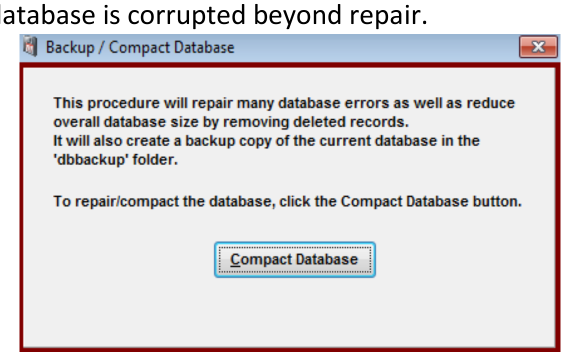
If you answer yes, the screen will be returned to the state above and you may try to type the second password again.

BACKUP/COMPACT DATABASE



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

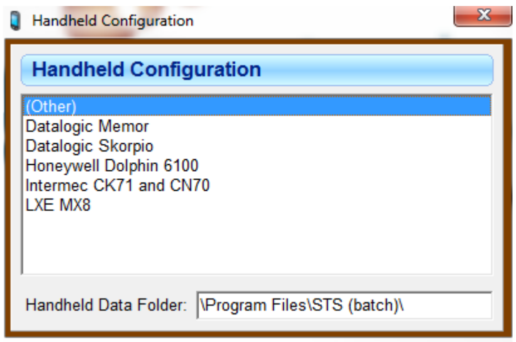


The system will retain three backup copies of the database in the dbbackup folder. Backing up frequently will minimize the loss of data if the current database is corrupted beyond repair.

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.

HANDHELD CONFIGURATION

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



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

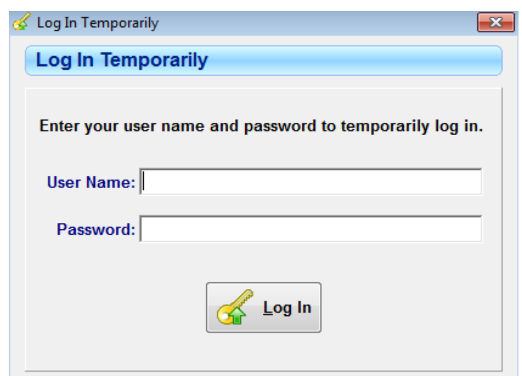
Pocket PC devices require Microsoft ActiveSync (for Windows XP) or Windows Mobile Device Center (for Windows Vista or newer) to communicate with TTS.

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

LOG IN 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.



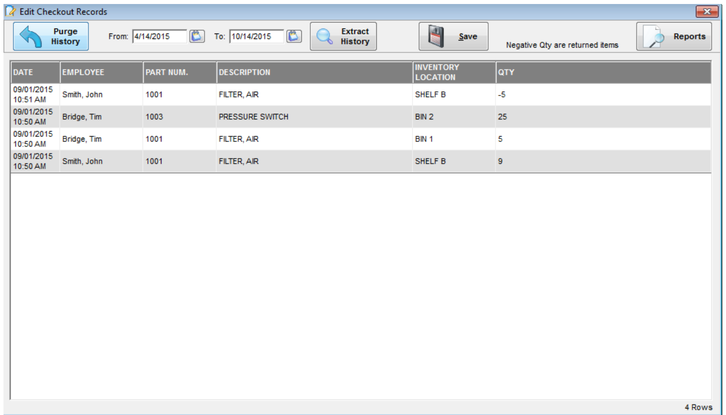
The banner on the main screen will turn red. As long as someone is temporarily logged into the system these conditions will remain.

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.

LOG OUT OF STS

The Log Out of STS function allows the user currently logged in to log out and disable STS without completely shutting down the application. In this state, a user may simply enter his user name and password to restart STS. Click on the File main menu item, and select Log Out of STS.

EDIT CHECKOUT RECORDS



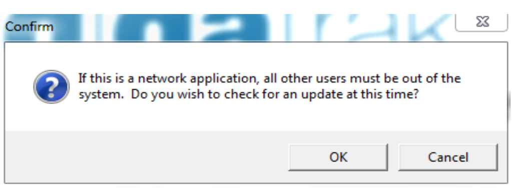
Some information in the checkout records can be edited. Click on File and then select Edit Checkout Records to open the screen. Only the Quantity, Work Order, and Account Number can be edited. Just click in the cell and enter the correct information, then click the “save” button.

PRINT SCREEN

Some screens in STS can be printed. To print the displayed screen, click on, and then select Print Screen. If the displayed screen cannot be printed, a message will appear to inform you. If the screen can be printed, a confirmation message will appear. Clicking the “yes” button will print the screen. Clicking the “no” or “cancel” buttons will return you to the screen without printing. You receive an error when trying to use the print screen function please check your printer assignments and make sure they are assigned properly.

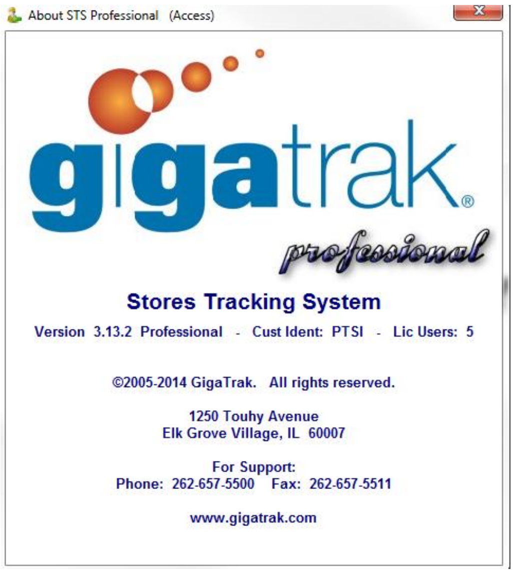
HELP MENU OPTIONS

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.**

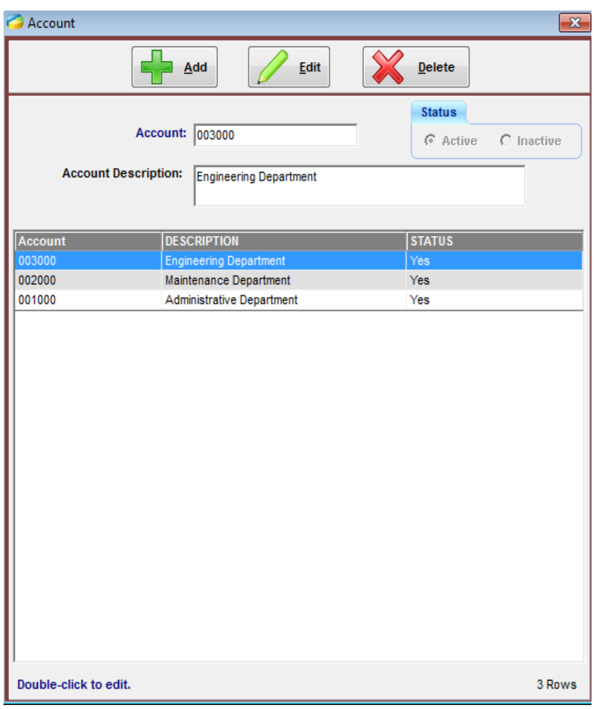
ABOUT STS



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



Account screem is used for account tracking when checking out items. Account numbers are not required to use STS. If you check out parts that require account tracking, then you can enter those accounts on this screen. Click on the Support main menu item and select Accounts to open the screen.

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

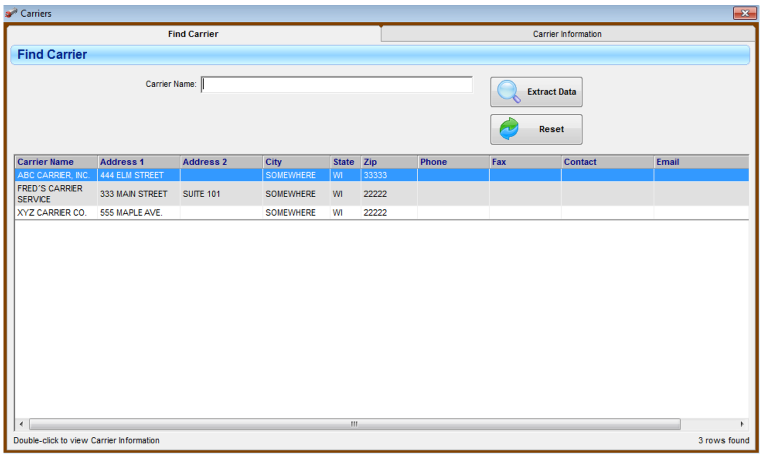
To Edit an Account, select the Account of interest and then select the Edit button. Modify the information as desired. Select the Save button to save the Account changes.

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

CARRIERS

The Carriers screen manages information relating to the companies you use to receive/transport goods. Carrier information is used on various screens and reports throughout STS. Click on Support, and then select Carriers to open the Carriers screen.

FIND AND VIEWING CARRIER INFORMATION



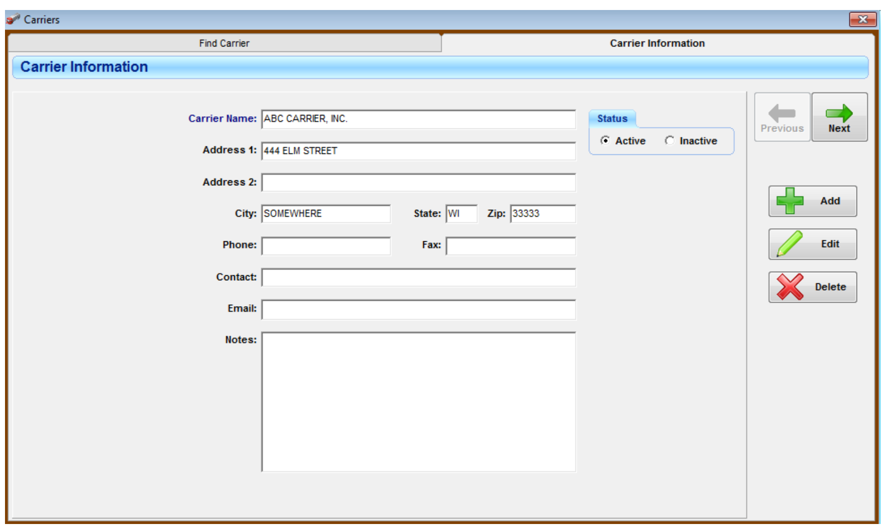
The Find Carrier screen lists all existing carriers and allows searching on a carrier name. To view the Carrier Information specific to a carrier, select the respective carrier by double-clicking or selecting the carrier you wish to view and then selecting the Carrier Information tab.

EDITING CARRIER INFORMATION

At any time, you may edit the carrier information. Simply select "edit" and place the cursor in the appropriate field to enter the new information. Click the "save" button when finished.

ADDING A NEW CARRIER

Click on the "add" button. Enter the name of the carrier in the carrier name field. The A mandatory field has a blue label. The Name field is the only required field on this screen. Press the "tab" key or click to navigate to the next field. Continue adding carrier information. When finished, click the "save" button when finished.



DELETING A CARRIER

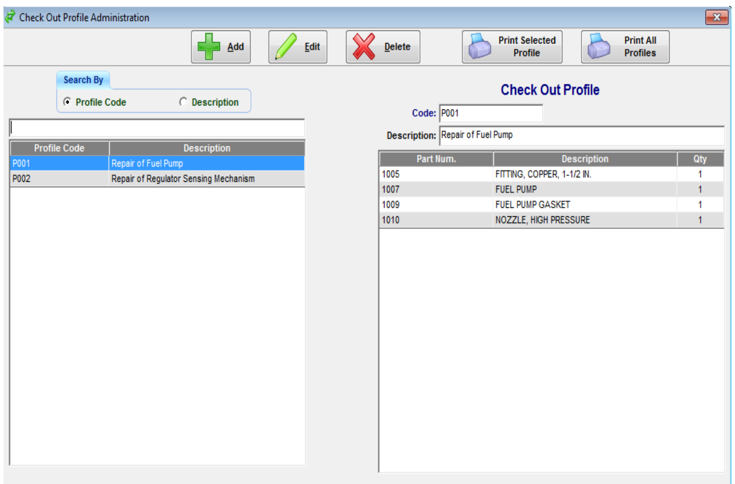
Select the carrier you wish to remove. Click the "delete" button. A prompt will appear asking if you're sure you want to permanently remove the displayed carrier. Clicking the "yes" button will remove the carrier. Clicking the "no" button will return you to the carrier screen without removing the carrier. The system will check to see if the carrier is tied to a history record. If so, the system will not allow the carrier to be deleted. You may inactivate the carrier to prevent it from being used in the future.

INACTIVATING A CARRIER

Carrier information is used on various screens and reports throughout STS. There may come a time, however, when you would like to keep a carrier from being made available to those screens and reports without removing them from the system. Clicking on the "inactive" button will inactivate the selected carrier, making it unavailable to other STS functions without permanently removing it from the system. Clicking on the "active" button will reactivate the selected carrier.

CHECK OUT PROFILE

A checkout profile is a pre-built list of parts that are checked out together for a specific purpose.



Selecting a profile speeds up the checkout process because the individual parts do not have to be entered each time. Click on Support, and then select Check Out Profile to open the screen.

VIEWING CHECK OUT PROFILES

Click on a profile on the left-hand side of the screen. A list of parts that are contained in the profile will appear on the right-hand side of the screen.

ADDING A NEW CHECK OUT PROFILE

Click the "add" button to create a new profile. Enter a code and description in the appropriate textboxes.

To add parts to the profile, select them on the left-hand side of the screen and click the "add" button. Multiple parts can be selected by holding down the Shift/Ctrl keys on the keyboard and clicking with the mouse. The new parts will appear in the right-hand list, with a default quantity of one. To change the quantity, click in the Qty column and enter a different number.

To remove parts from the list, select them on the right-side of the screen and click the "remove" button. Multiple parts can be selected by using the Shift/Ctrl/Click functions on the keyboard and mouse.

When you have finished building the profile, click the "save" button.

EDITING A CHECK OUT PROFILE

At any time, you may edit the check out profile information. Select the profile on the left-side of the screen. Click the "edit" button. A list of parts from the Part Master will appear on the left-side of the screen. Only parts that are assigned a default location in the Part Master will be shown. To add or remove more parts in the profile, select the parts and click the “add” or “remove” buttons. When you have finished making changes to the profile, click the “save” button.

DELETING A CHECK OUT PROFILE

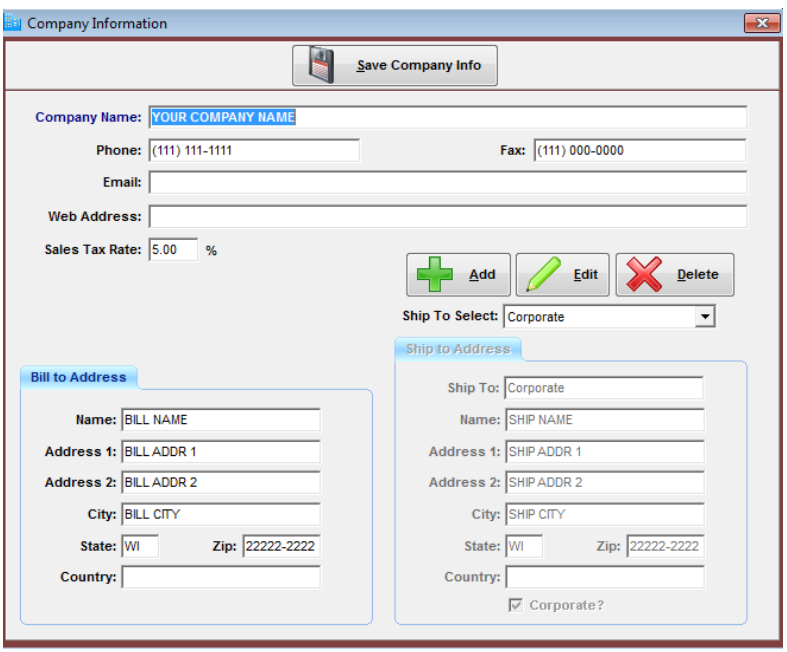
Select the profile to be removed on the left-side of the screen. Select the “delete” button on the button bar. A confirmation message will be displayed. Clicking the “yes” button will delete the profile. Clicking the “no” button will return you to the screen without removing the profile.

PRINTING A CHECK OUT PROFILE

Select the profile on the left-side of the screen. Click the “print” button. A print preview screen will appear with the selected profile displayed. If the default printer is set, the selected profile displayed on the screen will be printed when Print is selected. You may also save it as a PDF or Email the file directly.

COMPANY INFORMATION

The Company Information screen manages information relating to your company. Company information is used on various screens and reports throughout STS. Click on, and then select Company Information to open the Company Information screen.



BILL TO ADDRESS/SHIP TO ADDRESS

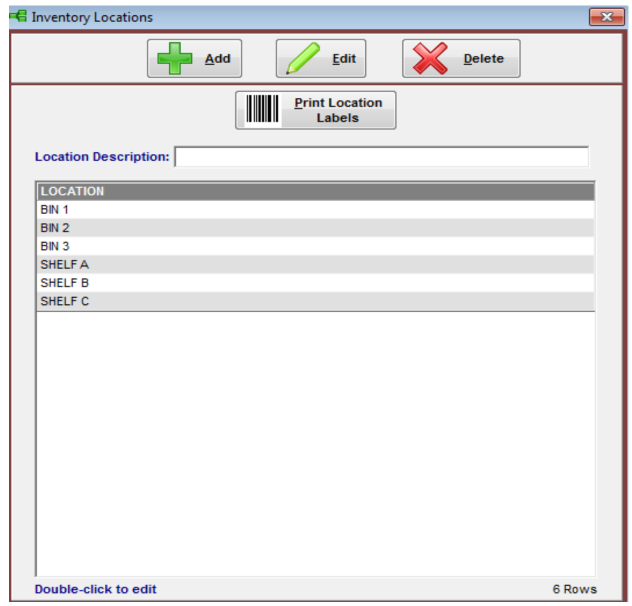
This information is used on the Purchase Order screen. You can have as many Ship To addresses as necessary. Click the “add” button to add a new Ship To Address. The “Ship To” information will appear in the drop-down list after the “save” button is clicked.

EDITING COMPANY INFORMATION

At any time, you may edit the company information. Simply place the cursor in, or use the “tab” key to select the appropriate field, and enter the new information. Click the “Save Company Info” button when finished.

INVENTORY LOCATIONS

The Inventory Locations screen manages information relating to your inventory locations. Inventory location information is used throughout the system on various screens and reports. Click on Support, and then select Inventory Locations to open the Inventory Locations screen.



ADDING A NEW INVENTORY LOCATION

To add a new location, select “add” and enter the name of the inventory location in the “Add Location” field. Click the “save” button. The inventory location name must be unique.

EDITING AN INVENTORY LOCATION

To edit a location, select “edit” or double-click an inventory location in the locations list. Enter the change in the “Location Description” field. Click the “save” button. Clicking the “cancel” button will dismiss the changes.

DELETING AN INVENTORY LOCATION

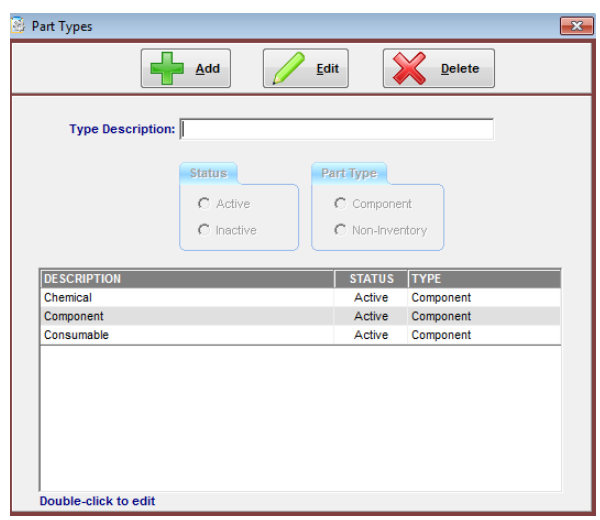
Click on the inventory location you wish to remove on the locations list. Click the “delete” button. The system will check to see if the location is tied to a history record. If so, the system will not allow the location to be deleted.

PRINTING LOCATION LABELS

Select the locations to be printed in the list. Multiple locations can be selected by holding down the Shift or Ctrl key on the keyboard and clicking in the list. Then click the “Print Labels” button.

PART INFORMATION

Part information contains the settings for Part Types and Units of Measure for parts in the system.



PART TYPES

The Part Types screen manages information relating to how parts are categorized in the system. Part type information is used on various screens and reports throughout STS. Click on Support, then Part Information and select Part Types to open the Part Types screen.

Adding a New Part Type

To add in a new part type, click the "add" button. Enter the new part type in the Type Description field. Select this type's status (defaults to active). Select the part type (defaults to component). Click the "save" button.

Editing a Part Type

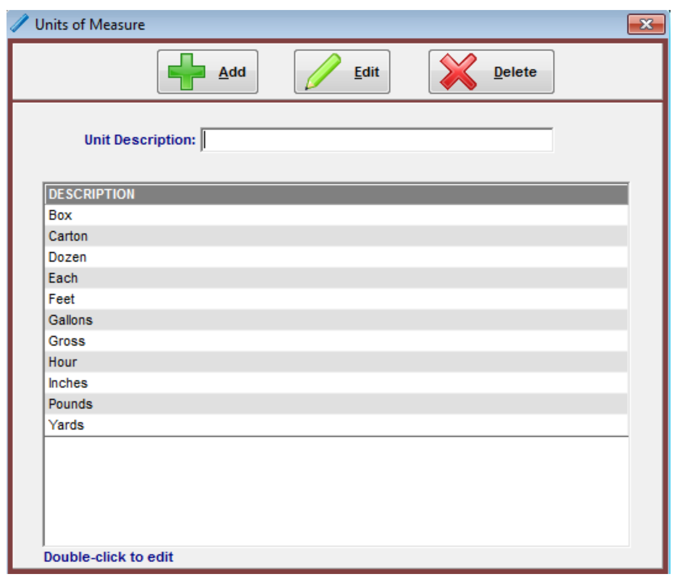
To edit a part type, select the row in the list that contains the part type information that you wish to change and click the "edit" button. You can also double-click to select the row and begin editing. Make the desired changes in the fields and boxes above the list. Click the "save" button.

Deleting a Part Type

Select the row in the list that contains the part type information that you wish to remove. Click the "delete" button. The system will check to see if the part type is tied to a history record. If so, the system will not allow the part type to be deleted. You may inactivate the part type to prevent it from being used in the future and still retain historical data.

UNITS OF MEASURE

The Units of Measure screen manages information relating to system units of measure information. Unit of Measure information is used throughout the system on various screens and reports. Click on Support, then Part Information and select Units of Measure to open the Units of Measure screen.



Adding a New Unit of Measure

Click the "add" button. Enter the new unit of measure in the "Unit Description" field. Click on the "save" button.

Editing a Unit of Measure

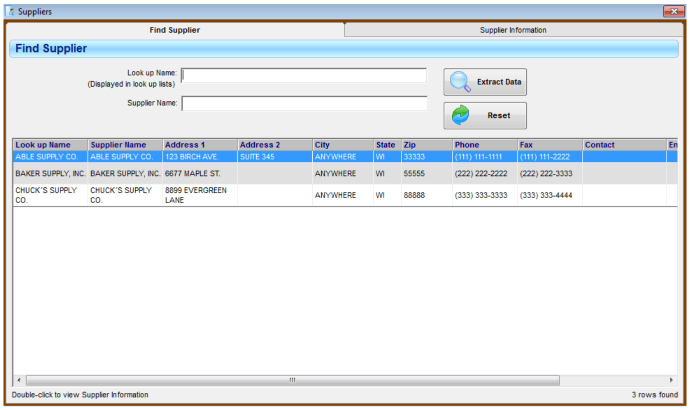
Select the unit you wish to edit and click the "edit" button. You can also double-click to select the row. Make the desired changes in the fields. Click the "save" button.

Deleting a Unit of Measure

Select the unit of measure from the units list and click on the "delete" button.

SUPPLIERS

The Suppliers screen manages information relating to the suppliers you use to purchase goods. Supplier information is used on various screens and reports throughout STS. Click on Support and then select Suppliers to open the Suppliers screen.



FINDING AND VIEWING SUPPLIER INFORMATION

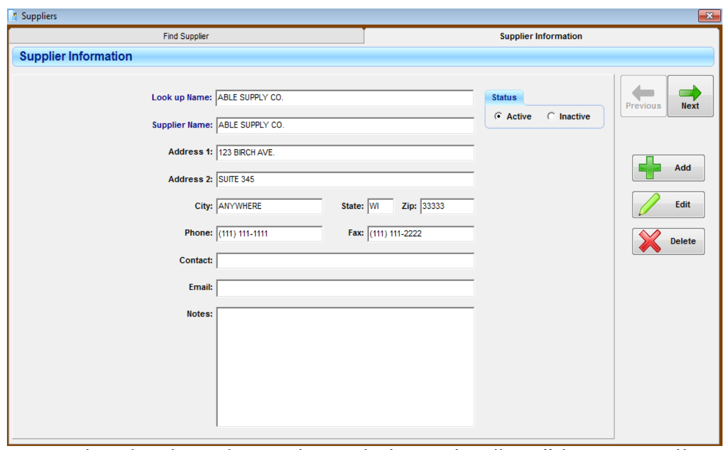
The Find Supplier screen lists all existing suppliers and allows searching on a look up or supplier name. To view the supplier information specific to a supplier, select the respective supplier by double-clicking. You can also select the "Supplier Information" tab to view the same information.

ADDING A NEW SUPPLIER

To add a new supplier, click the "add" button. A mandatory field has a blue label. Enter both the Look-up Name and the Supplier Name. These name fields are the only fields on this screen that are mandatory. Press the "tab" key to navigate to the next field. Continue adding supplier information using the "tab" key to navigate through the fields. Click the "save" button when finished.

EDITING SUPPLIER INFORMATION

At any time, you may edit the supplier information. Simply select "edit" and place the cursor in the appropriate field to enter the new information. Click the "save" button when finished.



DELETING A SUPPLIER

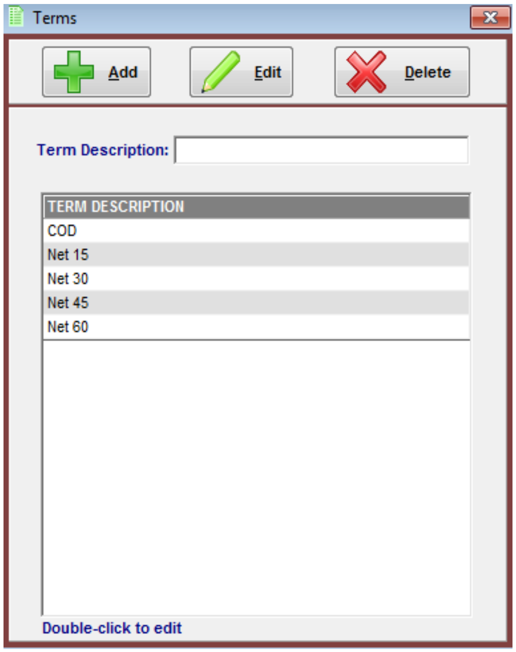
Select the supplier you wish to remove. Click the "delete" button. A prompt will appear asking if you want to permanently remove the displayed supplier. Clicking the "yes" button will remove the supplier; clicking the "no" button will return you to the supplier screen without removing the supplier. The system will check to see if the supplier is tied to a history record. If so, the system will not allow the supplier to be deleted. You may inactivate the supplier to prevent it from being used in the future and still retain historical data.

INACTIVATING A SUPPLIER

Supplier information is used on various screens and reports throughout STS. There may come a time, however, when you would like to keep a supplier from being made available to those screens and reports without removing them from STS. Clicking on the "inactive" button will inactivate the selected supplier, making it unavailable to other STS functions without permanently removing it from the system. Clicking on the "active" button will reactivate the selected supplier.

TERMS

The Terms screen manages information relating to the various purchase/sales terms used in your system. Terms information is used on various screens and reports throughout STS. Click on the Support main menu item and select Terms to open the Terms screen.



ADDING A NEW TERM

To add in a new term, click the “add” button. Enter the new term in the “Add Unit” field. Click on the “save” button.

EDITING A TERM

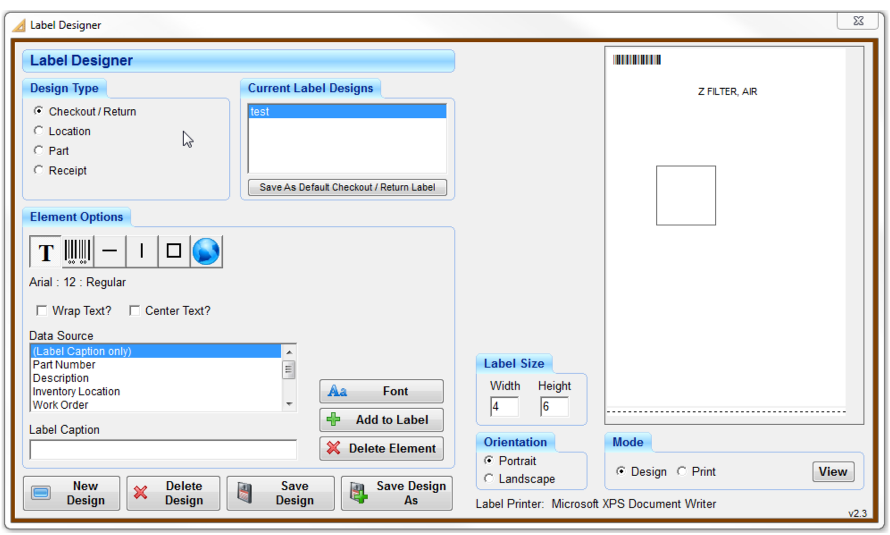
To edit a term, select the term you wish to edit and click the “edit” button. You can also double-click to select the row. Make the desired changes in the fields. Click the “save” button.

DELETING A TERM

Select the term from the terms list and click on the “delete” button.

LABEL DESIGNER

The Label Designer is used to design labels for the various processes in the system that print barcodes. There are four process which print labels: Checkout/Return, Location, Part and Receipt.



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

To design a label, first select the design type.

The data source list will contain the possible fields that may be included in the label.

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

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

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

LABEL QUICK START

ADDING A TEXT ELEMENT

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

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

ADDING A DATABASE FIELD TEXT ELEMENT

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

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

ADDING A BARCODE ELEMENT

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

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

ADDING A HORIZONTAL LINE ELEMENT

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

ADDING A VERTICAL LINE ELEMENT

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

ADDING A BOX ELEMENT

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

ADDING A GRAPHIC ELEMENT

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

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

DELETING A LABEL ELEMENT

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

DELETING A LABEL DESIGN

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

SAVE AN EXISTING DESIGN AS A NEW DESIGN

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

VIEWING/PRINTING A LABEL

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

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

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

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

INVENTORY COUNTS

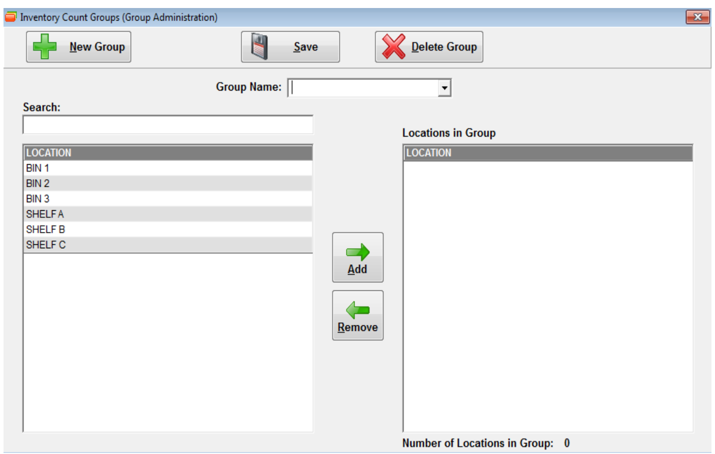
The Inventory Count function is used to verify inventory. The count function can either be manually recorded on the pc or by use of a mobile handheld computer.

GROUP ADMINISTRATION

Inventory count groups are used to make the cycle count process more manageable. Part numbers can be grouped together and loaded onto a handheld scanner. Click on Inventory Counts and then select Group Administration to open the screen.

ADDING/REMOVING PARTS IN A GROUP

To add parts into a group, select the parts for a group from the grid on the left-side of the screen. Multiple parts can be selected by holding down the shift/ctrl keys on the keyboard and clicking on the rows in the grid. Click the “add” button to add these parts to a group. If you want to remove the parts from the group, select them from the grid on the right-hand side of the screen and then click the “remove” button. Upon creating the desired group, enter a name for the group in the “Group Name” field and click the “save” button. You can create as many groups as necessary.



EDITING PARTS IN A GROUP

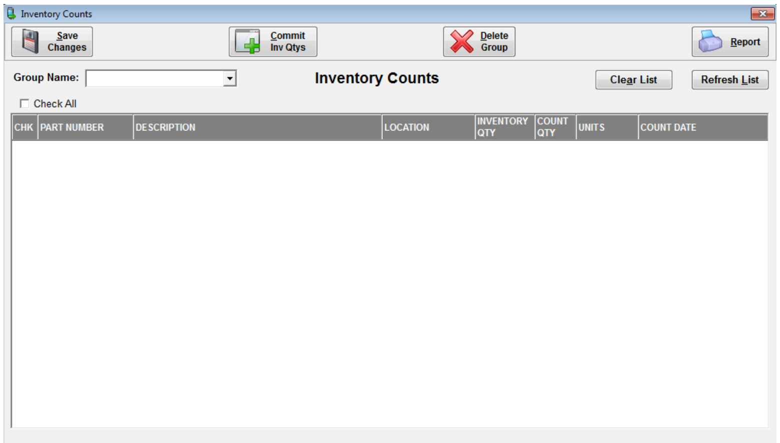
To edit a part group, select the group name from the drop-down list in the upper portion of the screen. All of the parts in the group will be listed in the grid below. Make as many additions or deletions as required and then click the “save” button.

DELETING A GROUP

Select the group name from the drop-down list. Click the “delete group” button. A prompt will determine if you wish to delete the group. Responding “yes” to the confirmation prompt will delete the group.

INVENTORY COUNT

After the count groups are created, one group can be selected for counting. Click on Inventory Counts and then select Inventory Count to open the screen.



Select a group from the Group Name list. All of the parts in that group will be listed in the grid. Once this group is saved for counting, a report can be printed with or without actual inventory quantities. This printed report can then be manually entered as the Count Quantity. If this matches the Inventory Quantity then the checkbox in the first column will be checked. If the count does not match, the checkbox will not be checked, and the part number and cycle count will be displayed in red. These items can then be verified. If the Count Quantity is correct, check the checkbox in the first column. If the cycle count value is not correct, it can be changed in the grid by selecting it with the mouse and entering in a different value. Then check the checkbox in the first column. Click the "save changes" button to save the changes. When the "Commit Inv Qtys" button is clicked, the inventory quantities will be changed to the count for all items that have the checkbox checked. Items that are not checked will not be changed.

***NOTE:** If an item is counted more than once, the last count will replace the previous count. This may be the cause for a count mismatch and would need to be verified.

USING THE HANDHELD TO PERFORM A COUNT

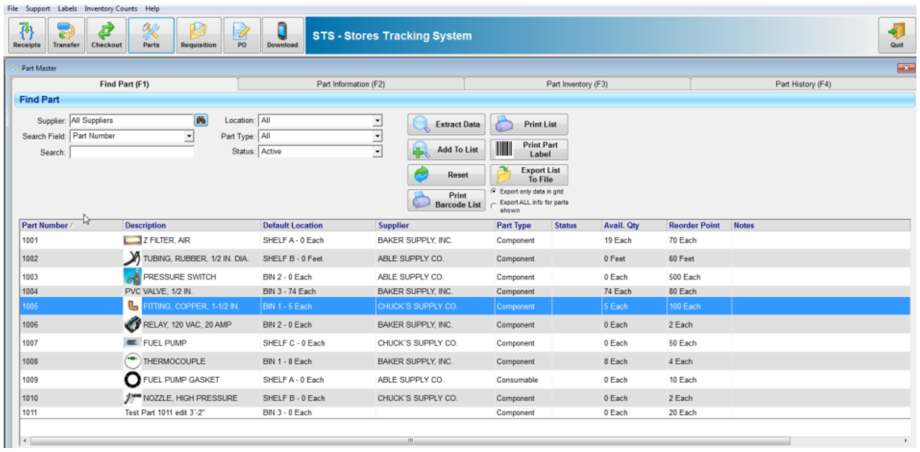
The mobile handheld computer can also be used to collect count data. After the count is completed, download the data from the scanner using the main menu download function. See Download in this Manual and STS Handheld Application Functions for more information.

REMOVE COUNT GROUP FILE

Click on the Inventory Counts main menu item and select Inventory Count to open the screen. Print any reports you many need before removing data from the count table. Select a group from the Group Name list. Click the "delete group" button. A confirmation box will be displayed. Responding "yes" to the message will display a second confirmation message. Responding "yes" to the second prompt will delete the group from the count table.

PARTS

FIND PART



The Find Part screen is used to view parts and print lists of the parts. The tab is controlled by sections on the upper part of the form, allowing you to filter and view those items by:

- Supplier
- Location
- Part Type
- 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.

All columns within in the grid can be sorted by clicking on the column header. Once the user sees an item they wish to view additional information, they can just double-click on the line item, press F2 or select the second tab to view the Part Information screen.

SEARCH FIELD

Groups of parts 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 parts that have the word “chair” in their description will be displayed. If a location is also selected, only parts 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 parts. When selected, it will appear to remain depressed. When in this mode, parts that are extracted will be added to the list of parts already shown on the screen, rather than clearing the screen first. You can continue to change the selection filters and extract the parts 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 parts in the list, select the Print List button. A report is displayed and if the default printer is set, the parts displayed on the screen will be printed when Print is selected. You may also save it as a PDF or Email the report directly.

PRINT BARCODE LIST

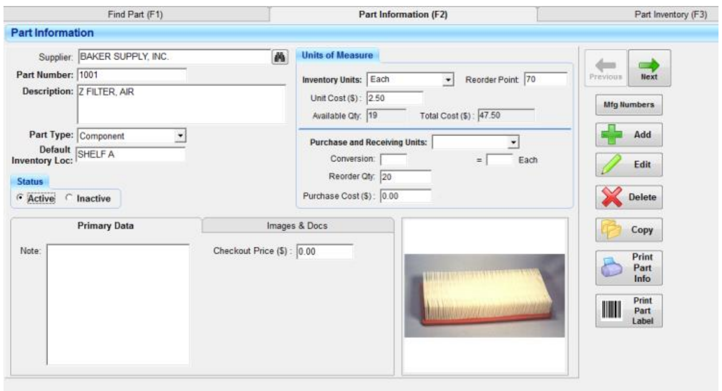
Print Barcode List will print a list of the displayed asset barcodes that can be used for scanning. The list will include the Barcode number, Barcode, and Description. When the Print Barcode List button is selected, a pop-up window will appear where you can set the barcode row height. This allows you 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 parts to a tab delimited text file.

PART INFORMATION

Part 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:



- Supplier—Sets the standard supplier for the part shown. Although any part can be ordered from any supplier using the PO module, it is easier to generate orders for the standard supplier when below the reorder point.
- Part Number—Sets the standard part number used internally for inventory management
- Description—Sets the standard description of the part
- Part Type—Sets the standard used to organize parts by similar type within inventory.
- Inventory Location—Sets the default location that the part can normally be found. The system doesn't limit the number of different locations a part can be stored in.
- Status—Sets the part status to active for parts in use; inactive is used for parts no longer used.
- Units of Measure—Sets the standard units of measure of the inventory being held for consumption along with Reorder point and unit cost.
- Purchase & Receiving Units—Triggers reports and reorders when inventory is low. This also sets purchase cost and how many to reorder at one time.

PRIMARY DATA SUB-TAB

- Notes—up to 255 characters of information about the part
- Checkout Price —Cost for checking out the item.

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.

PART INVENTORY

The Part Inventory screen contains detailed information regarding the current status of parts in STS. Clicking on the Part Inventory tab will display current location and quantity information that relates to the part that is currently selected in the list on the left. This screen also allows you to generate inventory reports, print labels and lists, and export to tab delimited text files.

SEARCH BY PART/MFG NUMBER

Click the drop down Search field to select either the Part Number or Mfg Number option. Enter the appropriate number in the Search field and click "extract" button. STS will display inventory information for the respective number you entered.

INVENTORY RECORDS

Adding a New Inventory Record

Generally, STS will manage inventory information through the use of the other screens (receipts, transfers, etc). However you may sometimes find it necessary to manually add items to inventory. To do this, click the "add" button. A new line will be created in the list. Enter the appropriate part information and use the "tab" key to navigate through the row. Click the "save" button when finished to add the record.

Deleting an Inventory Record

At any point, you may also delete an inventory item. To do this, first select the item you wish to remove by clicking anywhere in that item's row. Click the "delete" button. A prompt will appear asking whether to remove the selected item. Click the "yes" button to remove it; click the "no" button to cancel the process.

CHANGING AN INVENTORY RECORD'S QUANTITY

The Cycle Stock, Issue Stock, and Add Stock functions provide a quick and easy means of changing an inventory item's quantity. A history record is written with each transaction.

Cycle Stock

The Cycle Stock function allows you to change the current quantity of the selected inventory item to the entered value.

1. Enter the desired new quantity in the Qty field.
2. Enter the date, if different from the displayed date, in the Date field.
3. Enter the reason for the quantity change in the Reason field.
4. Click the "cycle stock" button.

Issue Stock

The Issue Stock function allows you to deduct the entered value from the current quantity of the selected inventory item.

1. Enter the quantity to deduct in the Qty field.
2. Enter the date, if different from the displayed date, in the Date field.
3. Enter the reason for the quantity change in the Reason field.
4. Click the “issue stock” button.

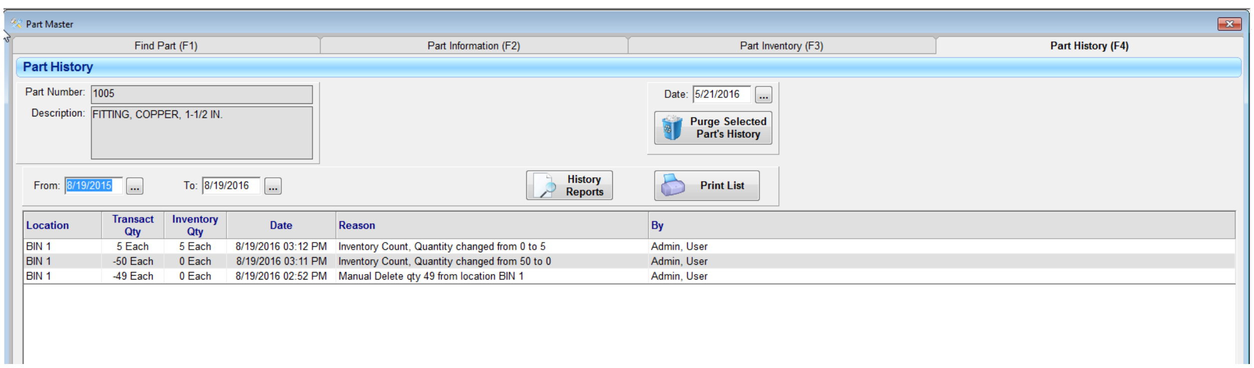
Add Stock

The Add Stock function allows you to add the entered value to the current quantity of the selected inventory item.

1. Enter the quantity to add in the Qty field.
2. Enter the date, if different from the displayed date, in the Date field.
3. Enter the reason for the quantity change in the Reason field.
4. Click the “add stock” button.

PART HISTORY

Selecting a part and then selecting the Part History tab will bring up the Part History screen below.



The screen displays the history of the selected part 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.

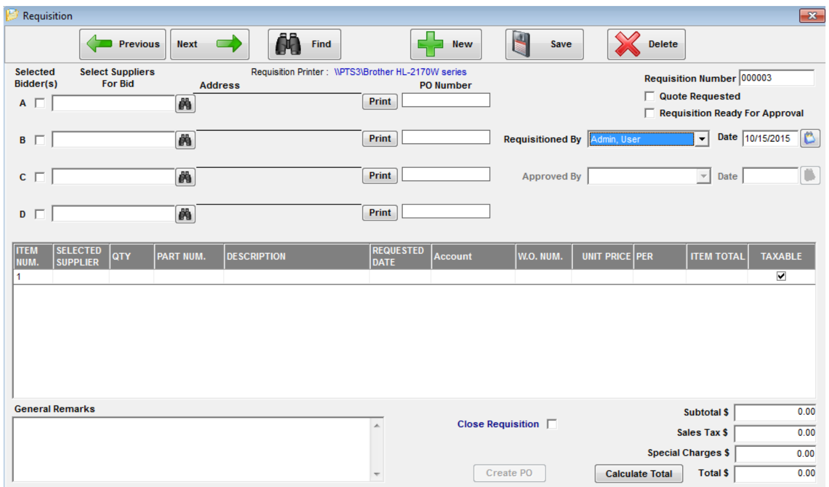
To print the history displayed on the screen, select the Print List button.

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.

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

REQUISITION

This module allows users of STS to go out for "bids" when desiring to purchase new materials. Bids can be reviewed and suppliers awarded specific materials for purchase. This is most commonly used by public agencies. Display Requisition in the setup options must be checked to be able to view this screen.



Select the supplier(s) that the bids will be sent to from the 'Select Suppliers for Bid' drop-down lists. A maximum of four suppliers can be selected for each requisition. When a supplier is selected, the phone number will appear below the box, and the address will appear to the right of the box (the phone number and address for each supplier must have been entered on the Supplier screen already).

Select your name from the "Requisitioned by" dropdown menu. The requisition date defaults to the current date. A different date can be selected by clicking the "calendar" button next to the date box, or by typing in a valid date.

Click in the 'item num' column of the grid and enter a number. Press the "tab" or "enter" key on the keyboard and enter the quantity needed. Press the "tab" or "enter" key to advance to the 'part num' column. A list of all parts in the database will appear. If the part number is known, you can scroll down the list and double-click on the part desired.

The part list can be filtered to make it easier to find a part. In the "search description for" textbox at the top of the parts list, enter a word that appears in the description. For example if you want to find a specific filter, type the word filter in the textbox and press the "enter" key on the keyboard. You can also press the "search now" button. This list will only show the parts that have the word filter anywhere in the description. To show all of the parts in the list again, remove any words that are in the textbox and press the "enter" key, or click the "search now" button.

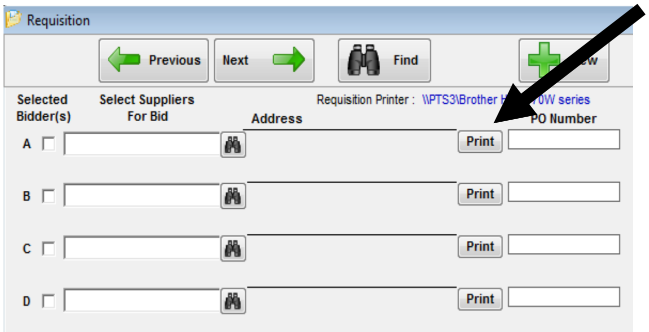
When a part is double-clicked, the part list will disappear and the 'part number', 'description', and 'per' columns in the grid will be filled in. Enter the requested date, if needed, and press the "tab" or "enter" key.

Enter an account number and a word order number, if desired. Leave the 'unit price' column blank. If the 'per' column is not correct, select a different one from the drop-down list. The 'item total' column is not editable. The 'taxable' column is checked by default. For non-taxed items, it can be unchecked by clicking on the checkbox.

Pressing the “enter” key on the keyboard in the ‘per’ column will create a new row in the grid, ready for another item. A new row can also be added by right-clicking in the ‘item num’ column and selecting the “add” option.

Enter any comments about the requisition in the ‘general remarks’ textbox. Click the “save” button when the requisition is completed.

REQUEST FOR QUOTE



Click the “print” button next to the supplier address. A message will appear asking which type of form you want to print. Click the “yes” button to print the “request for quote” form for that supplier. The preview form will appear on the screen. The form can be printed and sent to the supplier for a quote. After the request for quotes have been sent, check the quote requested checkbox on the Requisition screen and click the “save” button.

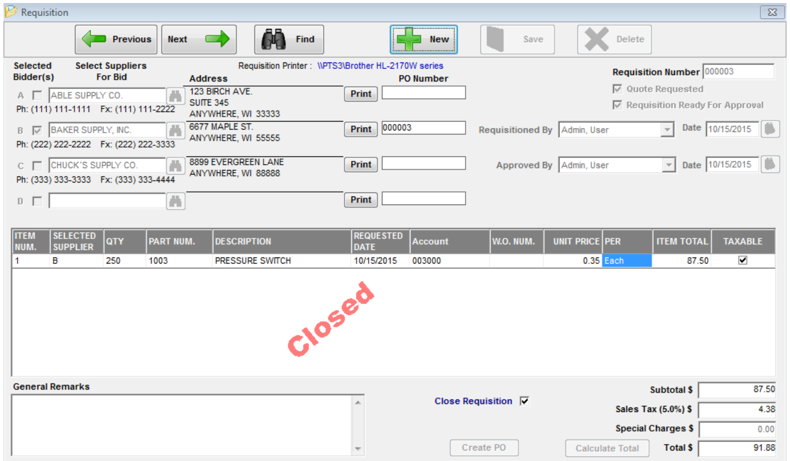
PRICING INFORMATION

After the suppliers have sent back their quotes, check the “selected bidder” checkbox for the chosen suppliers. When the first checkbox is selected, the ‘selected supplier’ column in the grid will be filled in with the supplier letter, or all items in the requisition. If more than one supplier is chosen, edit the ‘selected supplier’ column to indicate which items are for each supplier. Enter the price information in the ‘unit price’ column for each item. The ‘item total’ column will be calculated and filled in. The requisition totals will also be filled in. Enter any special charges that may apply in the ‘special charges’ box. Click the “calculate total” button to validate the calculations, then click the “save” button.

The requisition is ready for approval. Check the “requisition ready for approval” checkbox and click the “save” button.

The requisition can be approved by anyone who had authorization to do so. Access to this function is controlled in the User Authorization screen. An authorized user can click in the “approved by” textbox and enter his/her name. Enter a date in the date textbox by double-clicking the textbox to enter the current date, or by clicking the “calendar” button and selecting a date. Click the “save” button.

CREATE THE P.O.

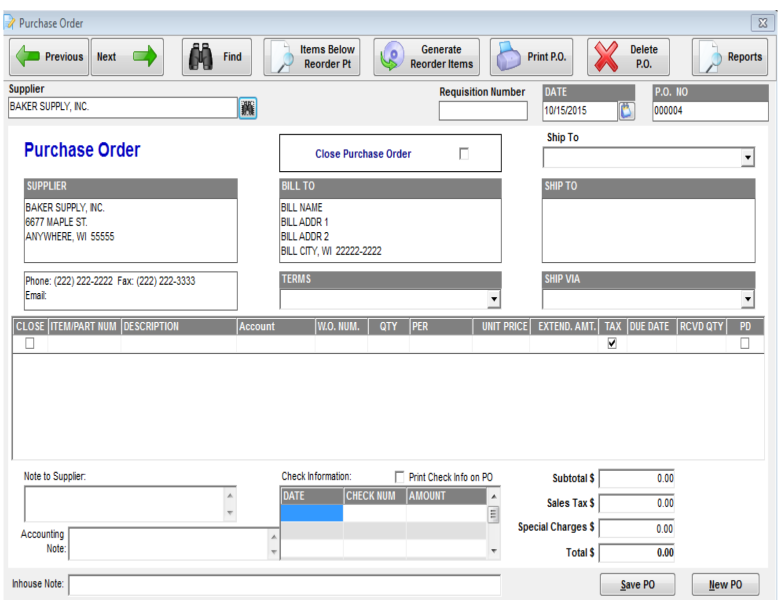


After the requisition is approved, click the “create PO” button. A PO will be created for each selected bidder containing the items that have been designated. The PO number will be displayed next to each “print” button of the selected bidder. After the PO’s have been created, the requisition will be closed.

If, after the requisition has been closed, changes to the requisition and PO’s need to be made, uncheck the “close requisition” checkbox. Make the changes and click the “save” button. Click the “create PO” button. The existing PO’s for the requisition will be deleted and new PO’s will be created.

PURCHASE ORDER

The Purchase Order screen provides an easy means to generate and record company purchases. You may also use this screen to view past purchase orders. To view the Purchase Order screen, click the PO button on the STS main button bar.



When the Purchase Order screen first opens, it is set up for creating a new purchase order. It has pre-selected your company as the bill-to/ship-to entity, set today’s date, and determined the next available purchase order number. This is exactly the same configuration the screen goes to when you click the “new PO” button.

***NOTE**: By default, STS generates purchase order numbers counting up from 000001. If you use a specially formatted purchase order number, enter your number in the ‘P.O. NO’ field and STS will maintain your formatting scheme.

VIEWING PURCHASE ORDER INFORMATION

You may view existing purchase orders by clicking on the “previous”, “next”, or “find” button.

"PREVIOUS" BUTTON

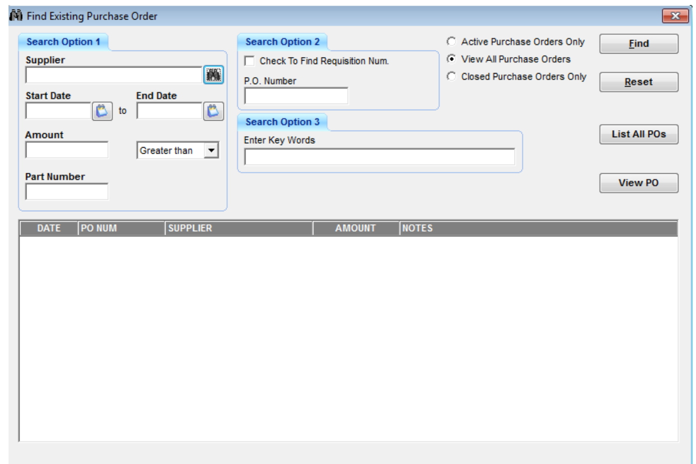
Clicking on the "previous" button displays the purchase order whose PO number is one less than the currently displayed purchase order.

"NEXT" BUTTON

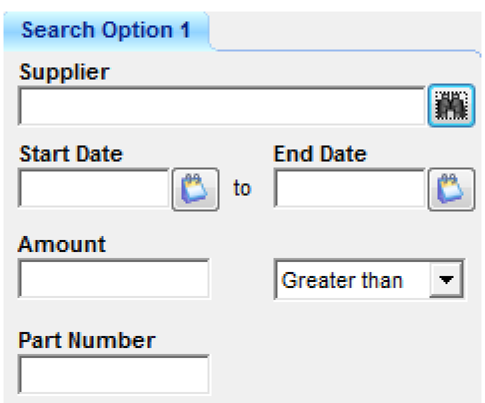
Clicking on the "next" button displays the purchase order whose PO number is one more than the currently displayed purchase order.

"FIND" BUTTON

Clicking on the "find" button displays the Find Existing Purchase Order screen. Use the Find Existing Purchase Order screen to locate and display any purchase order in STS.



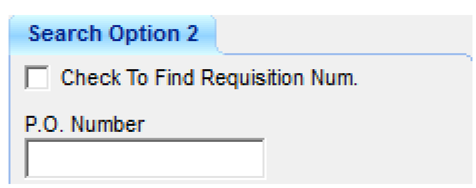
Search Option 1:



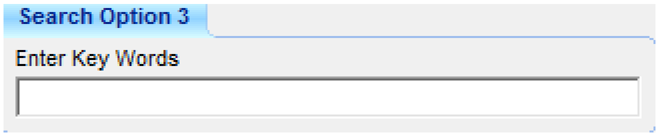
The Search Option 1 field allows for searching through the STS system for POs that match the entered data. For Example, select a supplier and all POs for that supplier will display. Select a supplier, enter a start date, and click the "find" button, and only POs for the selected supplier created on or after the start date will be displayed. Enter only a start date and end date and click the "find" button and POs for all suppliers between the date range will be displayed. Enter an amount, select 'greater than' and only POs with an amount greater than the entered amount will be displayed. Enter a part number and click the "find button"; only POs that have that part number will be displayed.

Search Option 2:

If you want to find a specific purchase order, just enter the purchase order number in the PO Number field and click the "find" button. The selected purchase order number will be displayed. If you want to view purchase orders created from a specific requisition, click the 'check to find requisition num' checkbox and enter the requisition number in the textbox. Then click the "find" button. Select the item from the list and click the "view" button.

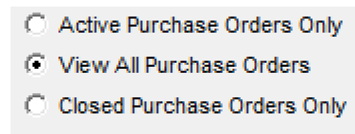


Search Option 3:



This option allows you to search for POs by entering words that appear in item descriptions. Multiple words can be entered with a plus sign (+) between them. For example, if the word “exterior” is typed in the key words box, all POs with that word in at least one item description will be displayed. If the words “exterior + red” is typed in the key words ox, all POs that have both “exterior” and “red” in at least one item description will be displayed.

Search Options:



The search option buttons work in conjunction with search options 1, 2, and 3. ‘Active Purchase Orders Only’ will display only purchase orders that are not closed. ‘View All Purchase Orders’ will display both open and closed purchase orders. ‘Closed Purchase Orders Only’ will display only purchase orders that have been closed.

Reset:

Clicking the “reset” button will clear the Find Existing Purchase Order screen so you can conduct a new search.

List All POs:

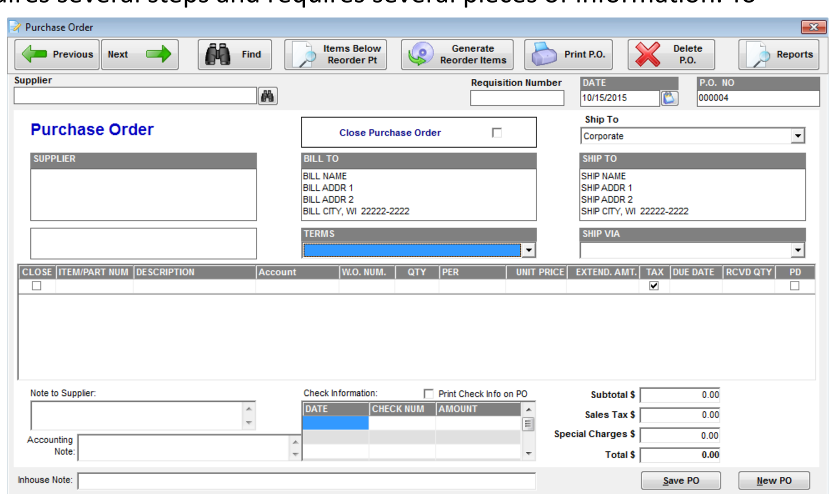
The “List all POs” button will display all purchase orders in STS

View PO:

Select a displayed purchase order by clicking anywhere in one of the rows of the displayed records list. Click the “view PO” button to display the selected purchase order details on the Purchase Order screen. The PO can also be displayed by double-clicking on a row.

CREATING A NEW PURCHASE ORDER

Creating a new purchase order requires several steps and requires several pieces of information. To begin:



1. Click the “new PO” button.
2. Click the “Select supplier” button (binoculars). A list of suppliers appears; click on one of them. The selected supplier’s address information is

loaded into the supplier address box.

3. Click the "ship-to" arrow to select information if you need to change from the default selection. If the Ship-to entity is not available in the list, click in the address box to manually enter the address information
4. Select Terms information.
5. Select Ship-Via information
6. Select the Part Num field in the parts list by using the mouse to double-click. This will display a list of parts that were entered in the Part Master. Double-clicking on a part in the list will enter the part number and description in the grid. You can also type a valid part number in the 'part num' cell and press the "enter" key. If the part number entered is not valid, you will not be able to use it. If the part number entered is value, the part description will display and the cursor will move to the 'acct. num' field.
7. Double-click in the 'acct. num' field to display a list of account numbers that were entered on the Accounts screen. Double-click an account number to enter it on the PO, or click the "x" button to leave the account number field blank.
8. Enter the work order number, if desired, and press the "enter" key.
9. Enter the quantity you wish to purchase and press the "enter" key. STS will calculate the total cost and prepare for the next entry.
10. The tax checkbox is checked by default. Tax will be calculated on all line items that have this box checked. If tax is not charged for a line item, uncheck this box.
11. If a line item is required by a specific date, enter it in the 'due date' cell.
12. Include note to supplier and for in-house use, if desired.
13. Click the "save PO" button when finished.

PRINTING A PURCHASE ORDER

Click the "print PO" button to view a printable copy of the currently displayed PO. If the default printer is set, the selected PO displayed on the screen will be printed when Print is selected. You may also save it as a PDF or Email the file directly.

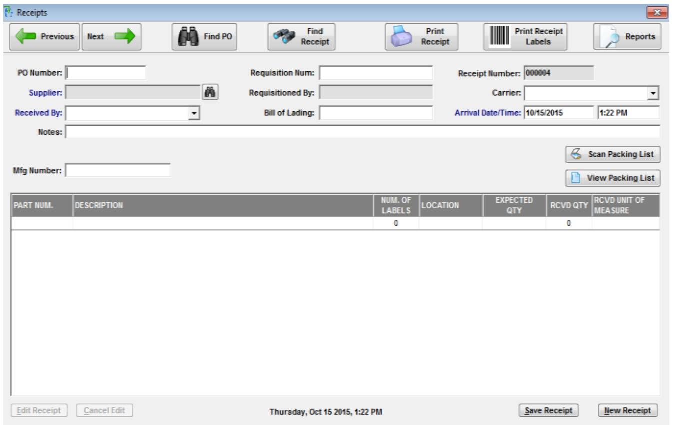
PURCHASE ORDER REPORTS

Clicking the "reports" button will display the Purchase Order Report screen. Use the Purchase Order Report screen to print a summary of purchase orders in STS based on user selected criteria.

The 'on time delivery' report shows late items for the selected supplier if a due date is specified on the PO. The filter to 'only show late line items' is only available if a specific supplier is selected.

The 'purchase order list' report shows a list of purchase orders for the selected supplier. Select the 'open POs' checkbox to limit the list to open POs only.

RECEIPTS



The Receipts screen provides an easy means to generate and record company receipts. You may also use this screen to view past receipt records. Receipt records are stored in STS in the order in which they were received. To view the Receipts screen, click the “receipts” button on the STS main button bar.

When the Receipts screen first opens, it is set up for creating a new receipt record. This is exactly the same configuration the screen goes to when clicking the “new receipt” button.

VIEWING RECEIPT RECORD INFORMATION

You may view existing receipt records by clicking on the “previous”, “next”, or “find receipt” buttons.

“PREVIOUS” BUTTON

Clicking the “previous” button displays the receipt record that was created immediately before the currently displayed receipt record.

“NEXT” BUTTON

Clicking the “next” button displays the receipt record that was created immediately after the currently displayed receipt record.

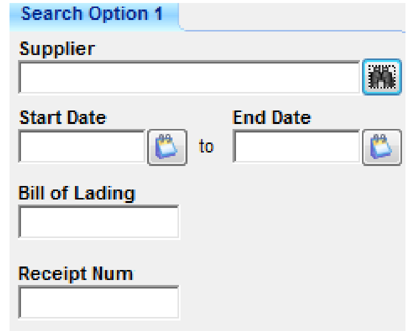
“FIND PO” BUTTON

Clicking the “find PO” button will display the Find Existing Purchase Order screen. Use the Find Existing Purchase Order screen to receive items from any PO in STS. See the Purchase Order section in this user’s manual for more information regarding this screen.

“FIND RECEIPT” BUTTON

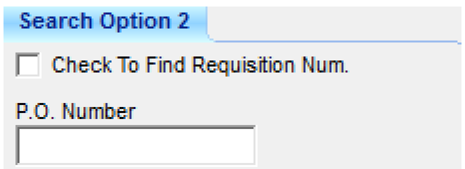
Clicking the “find receipt” button will display the Find Existing Receipt Record screen. Use the Find Existing Receipt Record screen to locate and display any receipt record in STS.

Search Option 1:



The Search Option 1 field allows for searching through the STS system for receipt records that match the entered data. For example, select a supplier and all receipts for that supplier will display. Select a supplier, enter a start date and click the "find" button and only receipt records for the selected suppler created on or after the entered start date will be displayed. Enter only a start date and end date and click the "find" button and receipt records for all suppliers created between the date range will be displayed.

Search Option 2:



If you want to know what was received against a specific purchase order, just enter the purchase order number in the PO number field and click the "find" button. The selected purchase order number will be displayed. If you want to receive purchase orders created from a specific requisition, click the 'check to find requisition num' checkbox and enter the requisition number in the textbox. Then click the "find" button. Select the item from the list and click the "view" button.

Reset:

Clicking the "reset" button will clear the Find Existing Receipt Record screen so you can conduct a new search.

List all Rec:

The "List all Rec" button will display all receipt records in STS.

View Rec:

Select a displayed receipt record by clicking anywhere in one of the rows of the displayed receipt records list. Click the "view rec" button to display the selected receipt records' details on the Receipts screen.

CREATING NEW RECEIPT RECORD

There are several steps involved in creating a new receipt record. To begin:

1. Click the "new receipt" button.
2. If you are receiving these items for a specific purchase order, and the purchase order number is known, enter the number in the PO Number field and press the "enter" key on your keyboard. Any open items on that purchase order will be displayed in the grid.
3. Enter any associated information in the fields provided if needed. Please note that Supplier, Received By and Arrival Time/Date are mandatory.

4. In the parts list, click in the Part Number field, enter a part number of the item received and press the “enter” key.
5. Tab to, or click in, the Location field and select an inventory location from the list. The system will default to the default location set up for that part.
6. Tab to, or click in, the Rcvd Qty field and enter the received quantity. You many also enter a number of labels to be printer if you need to print labels for the stock. Once you have all items in the receipt entered, click the “print labels” button. Labels will be printed based on the default receipt label design selected on the Label Startup menu. If a default receipt label is not selected, labels will not print.
7. Repeat steps for all items received.
8. Click the “save receipt” button when finished.

EDIT RECEIPT RECORD

The “edit receipt” button will let you modify the information on an existing receipt record. Locate a receipt record using one of the methods described above. When the record is displayed on the Receipt screen, click the “edit receipt” button. At this point the components of the receipt may be edited. Click Save Receipt to save the changed made.

PRINTING REPORTS

Receipt Record:

Click the “print” button to view a printable copy of the currently displayed receipt. To print, click the “print” button in the upper right corner of the screen. You may also save it as a PDF or Email the file directly.

Receipt Record Reports

Clicking the “reports” button will display the Receipt Reports screen. Use the Receipt Reports screen to view/print received items reports. Clicking the “generate report” button with all fields blank will display all receipt records currently in STS. Receipt Reports can be narrowed down by many fields such as date, PO number, part number, and receipt number. Once the report is generated as you like, you may print it by clicking the “print” button in the upper right corner of the screen. You may also save it as a PDF or Email the file directly.

TRANSFER SCREEN

The Transfer screen provides an easy means of transferring parts from one inventory location to another. To view the Transfer screen, click the “transfer” button on the STS main button bar.

SEARCH

Search options to locate an existing part are available on the top of the transfer page. To search for a specific part, choose whether you would like to search by part number or description in the search by box. The type the number or description you are looking for in the Search box. STS will automatically select the first part it finds that matches your requested specifications.

TRANSFERRING PARTS

1. Select the part you wish to transfer from the List on the left-side. A list of locations in which the selected part is currently located will be displayed in the current locations list on the right.
2. Select the location of the items you wish to transfer from the current locations list.
3. Select the location that the items will be moved from the select destination location beneath the current locations list.
4. Enter the quantity you wish to transfer.
5. Click the “transfer parts” button to transfer the parts. If you wish to cancel the part transfer, click the x in the top right corner of the transfer parts screen instead of the transfer parts button.

CHECKOUT

The Checkout screen is used to manage checking out items from inventory. Items can be checked out either from the PC or by using the handheld scanner. To view the Checkout screen, click on the “checkout” button on the STS main button bar.

CHECKOUT

The first tab of the Checkout Inventory section is the checkout tab.

1. Select the part you wish to be checked out. Search options to locate an existing part are available on the top of the checkout page. To search for a specific part, choose whether you would like to search by part number or description in the search by box. The type the number or description you are looking for in the Search box. STS will automatically select the first part it finds that matches your requested specifications.
2. Then, select the location the part being checked out is currently located from the Current Locations grid.
3. Select the employee that the part is being checked out to from the employee list.
4. Enter a work order and account number if applicable.
5. If the item is serialized, enter the serial number and then enter the quantity being checked out.
6. Click the “checkout parts” button. If you wish to cancel the part checkout, click the x in the top right corner of the checkout inventory screen instead of the checkout parts button.

SCAN OUT

The second tab of the Checkout Inventory section is the scan out tab. This can be used to quickly check out parts to someone, often using a scanner. Please note that some scanners will automatically return to the next line for you.

1. Enter/Scan in an employee ID in the textbox and press the “tab” or “enter” key. The system will then search the database for the ID. If a match is found, the employee’s name will be displayed below the employee ID box. If a match is not found, ‘unknown employee’ will be displayed.
2. Enter/Scan the work order number, account number and serial number in the appropriate textboxes if applicable. These fields may not appear and may or may not be required depending on the options selected in the Setup Options Menu.
3. Enter/Scan the part number of the item. The item can also be found by the MFG number by selecting the appropriate button above the part number. A checkout profile can also be selected for checkout at this time by using the profile button. Please see Checkout Profile in this Manual for more information about check out profiles.
4. Select the location and the quantity of the items at this time.
5. To save the checkout record for this scan, select the Save button at the top of the screen or select Save/Print to also view a printable report of the scanned checkout. To cancel the check out, select the Cancel Checkout button. To remove an unwanted item, select the item and then select remove item button.

RETURN

The third tab of the Checkout Inventory section is the return tab.

1. Select the part you wish to be returned. Search options to locate an existing part are available on the top of the return page. To search for a specific part, choose whether you would like to search by part number or description in the search by box. The type the number or description you are looking for in the Search box. STS will automatically select the first part it finds that matches your requested specifications.
2. Then, select the location the part being returned is being returned to from the Current Locations grid.
3. Select the employee that is returning the part from the employee list.
4. Enter a work order and account number if applicable.
5. If the item is serialized, enter the serial number and then enter the quantity being returned.
6. Click the “return parts” button. If you wish to cancel the return, click the x in the top right corner of the checkout inventory screen instead of the return parts button.

CHECKOUT/RETURN HISTORY

The final tab of the Checkout Inventory section provides a listing of all transactions over a specified date range. The most recent record is at the top of the list, sorted in reverse chronological order.

***NOTE:** The checkout/return history function is for viewing only and individual records cannot be modified. If editing of history records is necessary, the user must have admin rights and go to the “edit checkout records” option under the file menu.

PURGE CHECKOUT HISTORY

The purge history button for check outs can be found on the Checkout/Return History tab of the Checkout Inventory section. The checkout history table in the database can become very large over time. Old records can be removed by clicking the “purge history” button. A screen will appear to prompt for a purge date (default is three months prior to current date). The system will delete any records before this date.

***NOTE:** Entering the current date will remove all checkout records from the database.

Enter the desired date, and then click the “purge records” button. A confirmation message will be displayed. Responding “yes” to the message will delete the records; responding “no” will leave the records in the database.

REPORTS

Reports can be printed on the checkout and return history. Click the “reports” button on the Checkout/Return History tab of the Checkout Inventory section. A report screen will appear where report parameters can be entered. History reports can be narrowed down by many fields such as date, part number, serial number, order number or account number. The report can also be set to show the cost or price of an item. If no parameters are entered, the report will display all items in the checkout history table of the database.   Once the report is generated as you like, you may print it by clicking the “print” button in the upper right corner of the screen. You may also save it as a PDF or Email the file directly.

STS MOBILE HANDHELD APPLICATION

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

BATCH VS. WIRELESS HANDHELDS

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

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

COMMUNICATION WITH HOST PC

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

MICROSOFT ACTIVE SYNC INSTALLATION (FOR WINDOWS XP)

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

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

WINDOWS MOBILE DEVICE CENTER INSTALLATION (FOR WINDOWS VISTA OR NEWER)

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

INSTALL GIGATRAK HANDHELD APPLICATION

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

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

SYNC WITH HOST PC

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

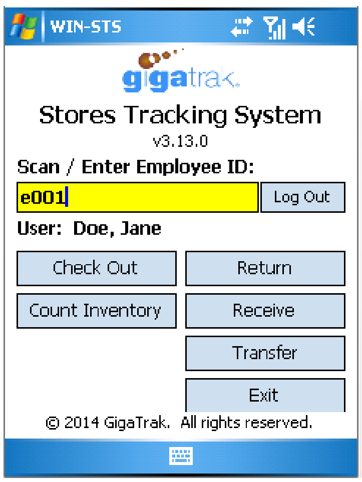
1) Start the Stores Tracking application on the host computer and select the Download button.
2) If your handheld device is not displayed on the screen title bar, click the Select Handheld button and select it.
3) Put the handheld in the dock and wait for it to sync with the PC.
4) Select the Sync Handheld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

STS HANDHELD APPLICATION FUNCTIONS

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

HANDHELD APPLICATION LOGIN

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



The user's scan ID is tied to the records recorded by the handheld. If a different employee uses the handheld, he/she should enter their scan ID before recording records. To change the user's scan ID, select "Log Out" and enter in a different employee's scan ID.

WIRELESS APPLICATION LOGIN

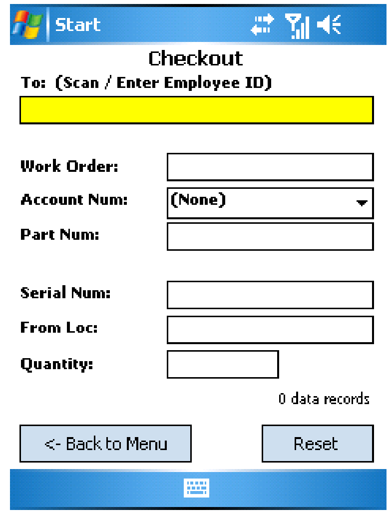
When starting the wireless handheld application for the first time, you will be prompted to enter the server name in Admin. Select the Admin button to display the Admin screen. You will be prompted to enter a password when you select this function. The password is gigastores. If you are entering the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

WIRELESS APPLICATION ADMIN

Display the on-screen keyboard and enter the SQL Server Name or IP Address and the database name (typically win_sts).

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

CHECK OUT



The Check Out function is used to check out parts to various employees.

Scan the ID of the employee. If the ID matches a record in the data file, the appropriate name will be displayed under the scan box.

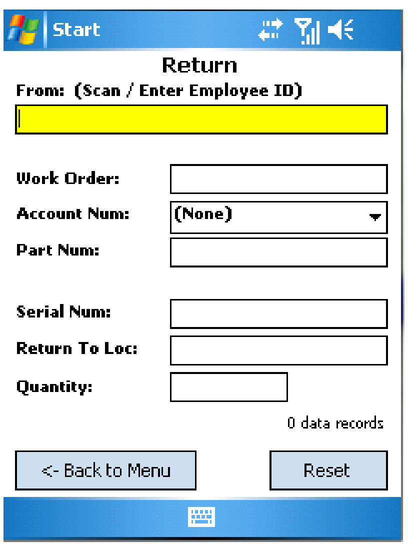
Enter the work order and account number if applicable, otherwise proceed to the part number field.

Scan the part number barcode. If the barcode matches a record in the data file, the part will be displayed under the scan box. Enter a serial number, and a location from which the part is being checked out.

Enter the appropriate quantity and press the Enter key to save the check-out record.

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

RETURN



The Return function is used to return parts from an employee back to their storage location.

Scan the barcode from which the part is being returned. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box. Enter a work order if applicable, followed by an account number.

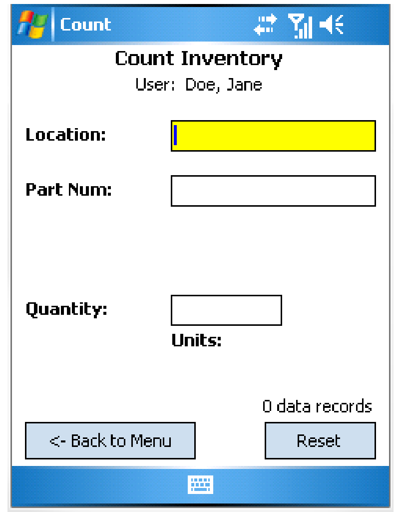
Enter the part number being returned. The part name will be displayed under the field.

If applicable, enter a serial number. Then, enter the location to which the part is being returned and the quantity being brought back to inventory.

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

COUNT INVENTORY

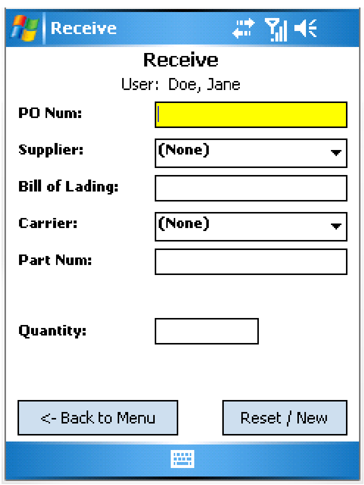
The Count Inventory function is used to count inventory that exists in various locations.



Enter the location of which you are counting inventory, followed by the part number being inventoried. After running a count, enter the quantity in its respective field and press the “enter” key. The handheld device will record the number counted for the part number and will display the information below the part number field.

The system will default to the same location to run another count. If you want to change locations, enter the new location and continue. The Reset button will clear data from the screen.

RECEIVE



The Receive function is used to when accepting a shipment of new/additional parts for inventory.

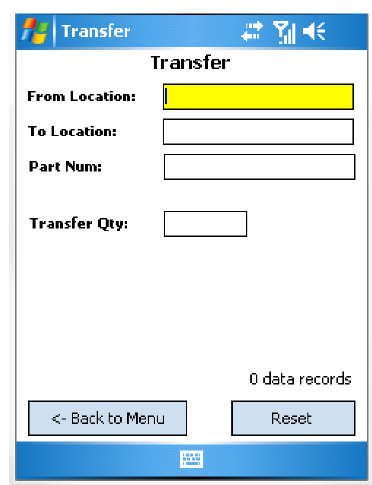
Enter the PO Number. Enter the supplier, bill of lading, and carrier if applicable. Enter the part number being received.

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

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

TRANSFER

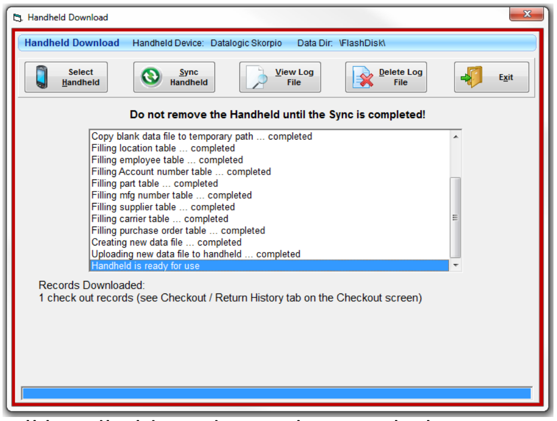
The transfer function moves a part from one location to another location.



First, scan the barcode of the location from which the part is moving. Then, scan the barcode of the location to which it is moving. Next, enter the part number of the item/document that is being transferred to another location. Finally, enter the transfer quantity and press “enter”. The part will be successfully moved to new location.

DOWNLOAD DATA BACK TO THE HOST APPLICATION

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



1) Start the Stores Tracking application on the host computer and select the Download button.
2) If your handheld device is not displayed on the screen title bar, click the Select Handheld button and select it.
3) Put the handheld in the dock and wait for it to sync with the PC.
4) Select the Sync Handheld button to begin the data transfer. Do not remove the handheld from the dock until the data transfer is complete. Once the handheld terminal and PC are initially synchronized, it is advisable to connect all handhelds and sync them with the PC database prior to using it for subsequent inventory counts in order to ensure that the information on the handheld is current and correct.

SUPPORT

GigaTrak provides 90-days of telephone support for STS 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.