



## **USERS' GUIDE SUPPLEMENT**

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This document is intended as an initial 4-step guideline to assist users in getting started with the process of setting up a solid data foundation for their GigaTrak Asset Tracking Software solution.

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### MANAGING ITEMS

- In-House Assets?
  - Computers
  - Office Equipment
  - Artwork
  - Educational Materials
  - Janitorial Supplies
  - Vehicles
- Equipment for Jobs, Projects, Customers, Businesses, Medical Offices, Educational Purposes?
  - Contractor Tools
  - Generators
  - Ladders
  - Vehicles
  - Hand Tools
  - Service/Repair Materials
  - Library Materials
  - Medical Equipment
  - Audio/Visual Gear
- Everything Managed?
  - Decide whether all items will be tracked, or only items at or above a certain value (\$)
- Consumables?
  - Determine whether any items will be tracked as expendable
- Binned Items?
  - Determine whether any items will be lumped together. These are typically items that won't have individual barcodes, but the grouping of these items will fall under a single barcode umbrella.
    - Hand Tools
    - Reams of Paper
    - Computer Accessories
    - Power Cables
    - Items of Clothing
    - Safety Glasses
    - Mops
    - Buckets
    - Nuts & Bolts
- Maintenance?
  - Decide whether any items will require tracking of maintenance and repairs?

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## ESTABLISHING FACILITIES & LOCATIONS

- Where is the origination point (home of the equipment)
  - Brought in through central warehouse and then allocated to person or place?
  - Stored in Shop, Storeroom, Warehouse and then assigned to a person or place with an expectation that it will be returned to storage area at some point?
  - Multiple storage areas, warehouses, or homes for items so that once assigned or checked out they may be returned to any one of them?
- Will the items be checked out or assigned to people?
  - Direct Employees?
  - Outside Contractors?
  - Students?
  - Consultants?
  - Customers?
- Will the items be checked out or assigned to places/locations?
  - Jobs?
  - Work Orders?
  - Buildings?
  - Apartments?
  - Offices?
  - Campuses?
  - Vehicles?
  - Health Club workout areas?

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## REVIEWING REPORTS

- Consider reasons for software implementation
  - Important to know equipment and items are located and the history behind where they've been.
  - Pay attention to how items and equipment are organized (class & type) and how items will be assigned (people or places)

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## ORGANIZING ITEMS

- Define main categories (classifications)
  - Group Items or Equipment
    - Office Furniture
    - Artwork
    - Computers
    - Computer Accessories
    - Hand Tools
    - Vehicles
    - Medical Surgical Supplies
    - Medical Prosthetics
    - Books
    - Generators
    - Lighting
    - Office Supplies

- Define sub-categories (types)
  - Group items under classifications
    - Office Furniture—chairs, tables, lamps...
    - Office Supplies—pens, paper, ink toner, envelopes...
    - Artwork—paintings, photographs, statues...
    - Computers—PCs, notebooks, tablets...
    - Computer Accessories—mice, mouse pads, USB cords, power supplies...
    - Ladders—step, extension, articulated
    - Media—DVD, CD, Flash disks, USB Drives, Cloud Storage...