



Maintenance

Thank you for using GigaTrak Software! This document explains the use of Maintenance in your Asset Tracking System. Maintenance is only available in Pro and School Editions of the system.

The maintenance function of the system allows users to keep track of necessary maintenance for each of their assets. Maintenance is tied to the different classes and types of the asset. This document will first go over how to create Maintenance items and then how to perform/record Maintenance on individual assets.

Creating Maintenance Items

In order to perform Maintenance, you must first create your Maintenance items. This is accomplished exactly like User Defined Fields. Maintenance items are entered per **TYPE** of Asset.

For example, ABC School District has over 5,000 laptops in their system. They want all 5,000 laptops to be checked for a software update once per year (once every 12 months). Therefore, they will enter the Maintenance of "Check for Software Update" under the Type of "Laptops".

To enter new Maintenance, go to Support → Asset Support Administration. Go to the 4th tab (F4) called Maintenance. Start by choosing the Class and Type of your Asset you need to create a Maintenance item for. In the example below, it's;

- Classification: Computer Equipment
 - Type: Laptops

Then press “Add”. Maintenance description is required. In this example it would be “Check for Software Update”. Special instructions are optional. Put in the interval (in months) on how often this maintenance item should come due.

The screenshot shows the 'Asset Support Administration' window with the 'Maintenance (F4)' tab selected. The form contains the following fields and controls:

- Classification (F1):** A dropdown menu set to 'Computer Equipment'.
- Type (F2):** A dropdown menu set to 'Laptops'.
- Maintenance Description:** A text box containing 'Check for Software Update'.
- Special Instructions:** A text area containing 'Run all available updates and disk defragmentation'.
- Interval:** A text box with '12' and the label 'Months'.
- Status:** A group box with a 'Status' label and two radio buttons: 'Active' (selected) and 'Inactive'.

At the bottom of the window, there is a table with the following columns:

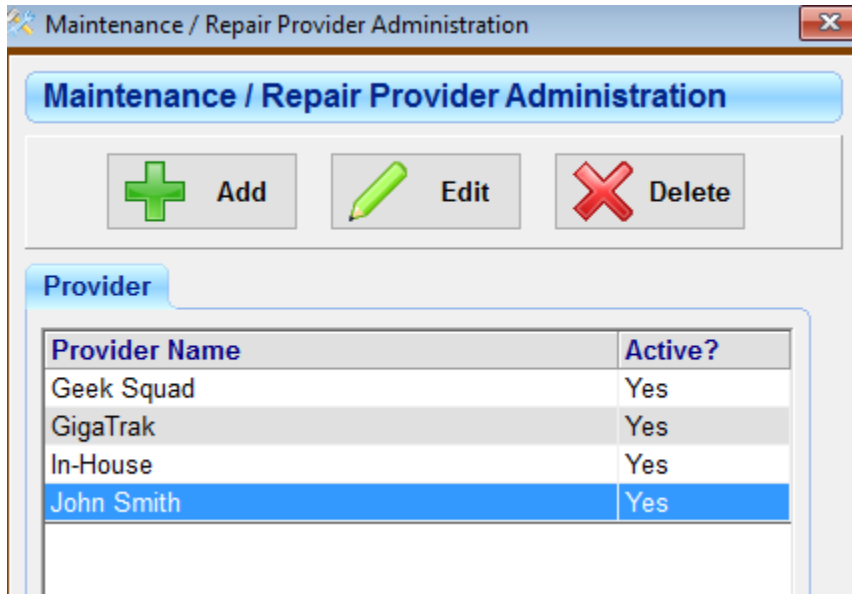
| Maintenance Description | Special Instructions | Interval | Active? |
|-------------------------|----------------------|----------|---------|
| | | | |

Now, all laptops in my system will be assigned this one Maintenance item.

All Maintenance Items are entered per Type of Asset on this screen. When it comes time to perform/record Maintenance on individual laptops, you will do that in the Assets icon on the F4 (Asset Maintenance) tab.

Perform/Record Maintenance on individual assets

In order to record Maintenance on an individual Asset, you must first have your Maintenance Repair Providers listed in the system. Repair Providers are the company or person that is fixing your assets. You can enter as many Repair/Maintenance Providers as you need in Support → Maintenance/Repair Provider Administration.



*You will not be able to record any Maintenance without having at least one repair provider listed in the above screen.

Search for the Asset you would like to record Maintenance on and go to the F4 (Asset Maintenance) tab.

Maintenance items available on this specific laptop.



If you wanted a second Maintenance item for this laptop, you cannot enter it from this screen. You must go back to Asset Support Administration and add it there.

Your Maintenance Interval will calculate based off the “In-Service Date” of your Asset on the F2 (Asset Information) tab. If you know the last date a specific item was serviced, you can either change your In-Service Date to match to get your Asset on the correct interval or you can perform a “fake” maintenance record and pick your completed date as the last date the Maintenance was performed.

In order to record Maintenance on a specific Asset, click the check box of the Repair Type and press “Add”.

The screenshot shows the 'Asset Maintenance' form with the following fields and values:

- Asset ID: A8801
- Description: Dell Laptop
- Model Number: [Empty]
- Serial Number: [Empty]
- Start Date: 1/12/2018
- Repair Type: Check for Software Update
- Repair Provider: [Empty]
- Completed Date: [Empty]
- Notes: [Empty]
- Condition: [Empty]
- Repair Cost: [Empty]

The Maintenance Items table is as follows:

| Maintenance / Repair Type | Special Instructions | Interval (Months) | Last Done | Next Due |
|---|---|-------------------|------------|------------|
| <input checked="" type="checkbox"/> Check for Software Update | Run all available updates and disk defragmentation. | 12 | 10/27/2018 | 08/27/2019 |

The system will automatically fill out today’s Start Date and Repair Type.

Next, use the drop-down menu to pick the Repair Provider (this is the company or person who is fixing your asset). You must first have Repair Providers listed in Support → Repair/Provider Administration.

If you are only sending your Asset out to get fixed, and it is not fixed yet, then you will leave the Completed Date blank and press Save.

A prompt will come asking if you would like to Print a Maintenance Request for this item. Saying Yes will pull up the Maintenance Request. Saying no will not.

The screenshot shows the 'Asset Maintenance' form with the following fields and values:

- Asset ID: A8801
- Description: Dell Laptop
- Model Number: [Empty]
- Serial Number: [Empty]
- Start Date: 1/12/2018
- Repair Type: Check for Software Update
- Repair Provider: OgaTrak
- Completed Date: [Empty]
- Notes: [Empty]
- Condition: [Empty]
- Repair Cost: [Empty]

The Maintenance Items table is as follows:

| Maintenance / Repair Type | Special Instructions | Interval (Months) | Last Done | Next Due |
|---|---|-------------------|------------|------------|
| <input checked="" type="checkbox"/> Check for Software Update | Run all available updates and disk defragmentation. | 12 | 10/27/2018 | 08/27/2019 |

A dialog box titled 'Print Maintenance Request' is overlaid on the form, containing the text: 'Maintenance / repair item has been saved. Do you want to print a Maintenance Request for this item?' with 'Yes' and 'No' buttons.

Once you have received the item back, go back to the F4 Asset Maintenance tab and click on the second tab below called "Maintenance History".

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

- Barcode:** A0001
- Model Number:** [Empty]
- Description:** Dell Laptop
- Serial Number:** [Empty]
- Start Date:** 07/23/2018
- Notes:** Updated to Windows 10
- Repair Type:** Check for Software Updates
- Repair Provider:** DeskQuest
- Condition:** [Empty]
- Completed Date:** 07/23/2018
- Repair Cost:** 0.00

The 'Maintenance History' table contains the following data:

| Maintenance / Repair Type | Provider | Notes | Employee | Start Date | Completed Date | Condition | Cost |
|--|-----------|-------|------------|------------|----------------|-----------|------|
| <input checked="" type="checkbox"/> Check for Software Updates | DeskQuest | | User Admin | 07/23/2018 | | | 0.00 |
| <input type="checkbox"/> Check for Software Updates | DeskQuest | | User Admin | 07/23/2018 | 08/27/2018 | | 0.00 |

Total Cost: 0.00

Mark the box of the Maintenance Item you would like to Edit and press the "Edit" button. Fill in remaining information including completed date, notes (if necessary), condition, and repair cost. Press Save.

The bottom right-hand-corner will give you a total running cost for all Maintenance on this particular Asset. You can also print out a Maintenance History record in PDF format.

Maintenance Setup Options

There are a number of Setup Options pertaining to the Maintenance function of the system that you can change in Setup Options. First, make sure you are logged in as the Admin. Next, go to File → Setup Options.

On the first tab, you will see a section called “Service Reminder Intervals”. This is saying how soon in advance you will be notified that Maintenance is coming due on an asset. This is set in days.

Example: If I have “Check for Software update” on my laptops once a year (once every 12 months), then I will be notified 7 days in advance that item is coming due.

Service Reminder Interval:

On the second tab of the Setup Options, F2 (Application Settings), there are a few items that pertain to Maintenance.

First one is ‘Auto-create “Repair” maintenance type’. If your company plans on using the Maintenance feature, we highly recommend you turn this on prior to entering any assets in to your database. This feature automatically creates a “Repair” Maintenance item on ALL assets in the database without you having to manually input one in. The Repair Type has no interval, it never comes due, it is there for when the asset breaks and you would like to record that you are repairing it.

Auto-create "Repair" maintenance type

The next one is ‘Show Maintenance Due Report after Log in’. This is one of only two reports that you can have pop-up right upon logging in. Any asset that is coming due within your Default Service Reminder (in this case 7 days) will appear on the report. You can also run this report manually if need be.

Show Maintenance Due Report after Log in

| Asset Maintenance Due | | | | | | |
|-----------------------|--|--------------|---------------|------------------|------------|------------|
| Coming Due | | | | | | |
| Barcode | Description | Model Number | Serial Number | Maintenance Type | Last Done | Next Due |
| P183 | iPad Mini 2 | 5255 | 968751351 | Software Update | 06/27/2018 | 07/27/2018 |
| | Current Emp / Loc: Storage (ABC Company) | | | | | |
| A0002 | iPad Mini 2 | 5255 | J4525888 | Software Update | 06/29/2018 | 07/29/2018 |
| | Current Emp / Loc: Betz, Greg | | | | | |

Last, if you are using a mobile handheld computer, you can choose to turn the Maintenance feature on the handheld either on or off. If you do not want employees recording Maintenance on the Handheld, you can turn it off. If allowed, keep the box checked.

 Show Maintenance on Handheld

For specific questions on Maintenance, please contact support@gigatrak.com