



Master/Catalog/Template Feature

Thank you for using GigaTrak Software! This document explains the 'Master' function of the Tool Tracking System.

The 'Master' is a completely optional feature that can be used to create consistency when adding in new tools. It is essentially a Tool Template that keeps the basic information about a specific Type of tool (Class/Type/Description/Master #). **Tools in your Master are not a list of your current inventory.** This document refers to the Master function as 'Tool Template' for an optional name.

To create new Tool Templates in your database you have 3 options:

- 1). Import items via Spreadsheet (found on TTS Client Center)
- 2). Add in Manually from the F2 tab of the Tool Template icon (See Page 3-4)
- 3). Create a Tool Template out of an existing Tool. To do so, press "Edit" on the F2 tab of an existing tool. Next, type in a Tool Template number and press "Save". (Page 7)

The term 'Master' is derived from the fact that many users order items or materials from a manufacturer's "Master" catalog.

The master item is generic, as it has no assigned barcode until it is received and put into company inventory.

This document refers to the Master function as 'Tool Template' for an optional name. You can rename this field in the first tab of the Setup Options.

Setup Options

Edition
 Basic Pro Contractor

Tool Setup (F1) Application S

Rename Classification: Classification

Rename Type: Type

Rename Facility: Facility

Rename Location: Location

Rename Funding Source: Funding Source

Rename Model Number: Model Number

Rename Serial Number: Serial Number

Rename Account: Account

Rename Condition: Condition

Rename Master: Tool Templates

Root Image Folder: ...

Root Document Folder: ...

Custom Report Folder: ...

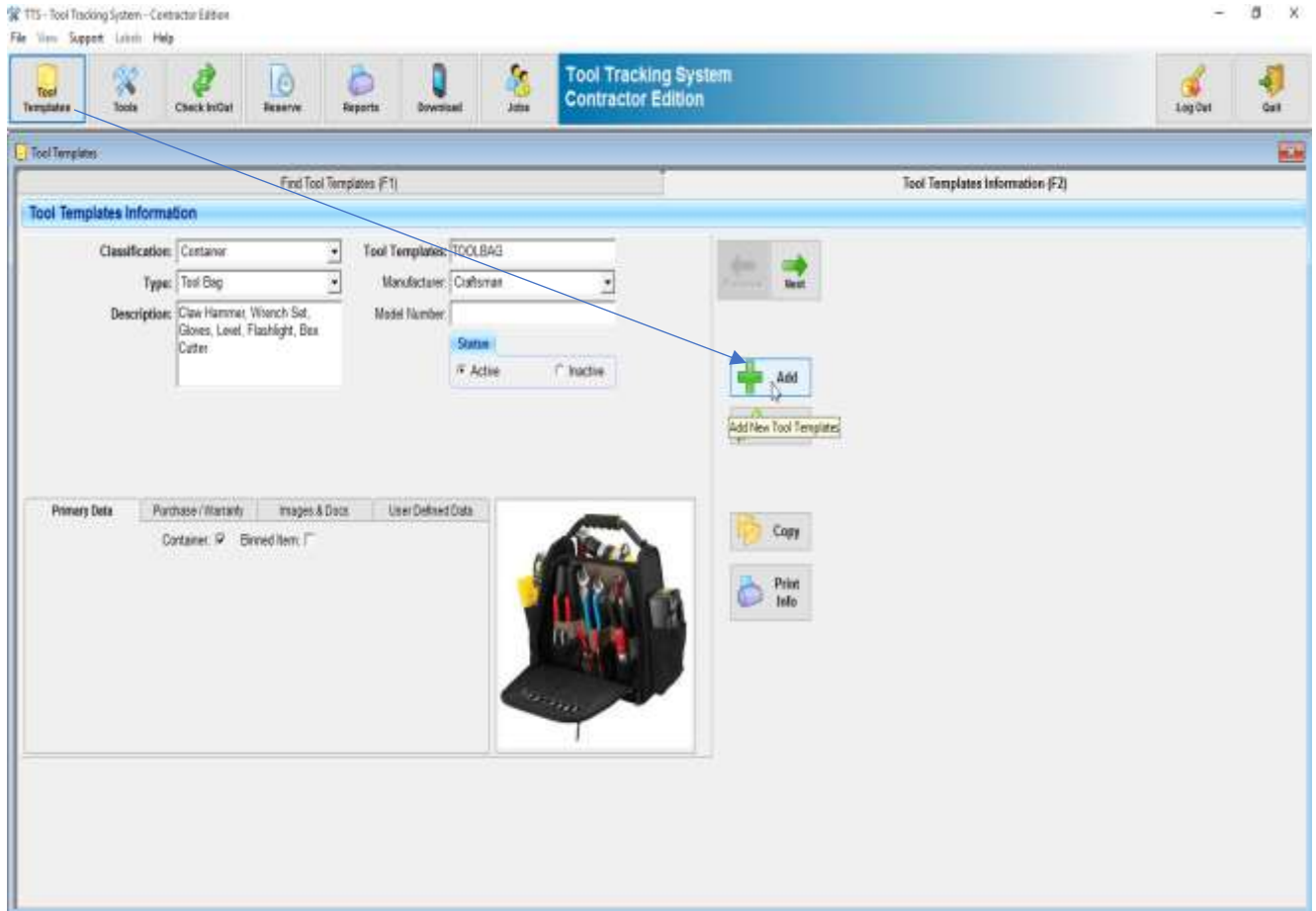
Report Logo: ...

TTS - Tool Tracking System - Contractor Edition

File View Support Labels Help

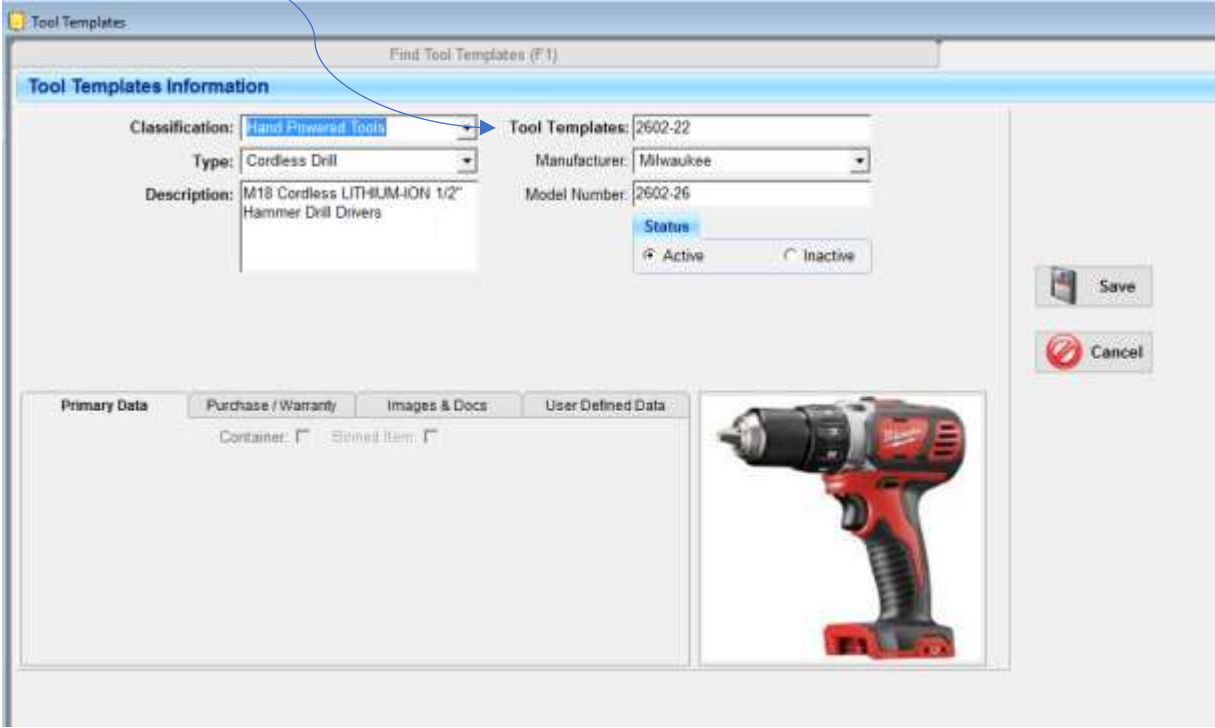


To Manually add in a New Tool Template, click on the “Tool Template” icon and go to the F2 tab. From here, click “Add”.



Populate the fields with the basic information for the item. This can include images, documents and user defined fields. Note: all bolded fields are mandatory.

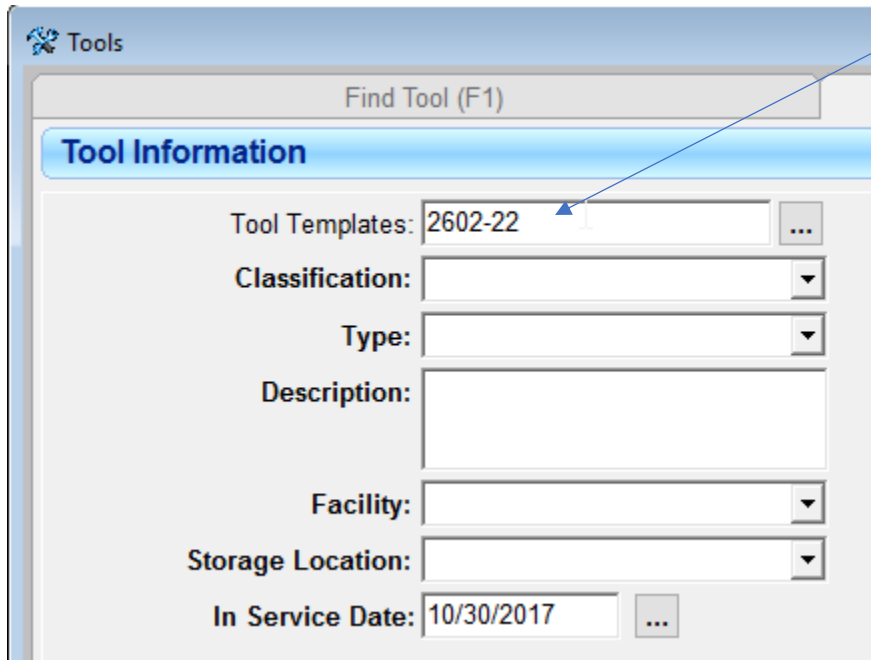
You also need to determine how to identify this template later when it's used to create a 'unique' tool in your database. This identifier will serve the same purpose that the 'barcode' does for pulling up information on individual items. Many customers choose a model number as the Tool Template number.



SAVE when Complete.

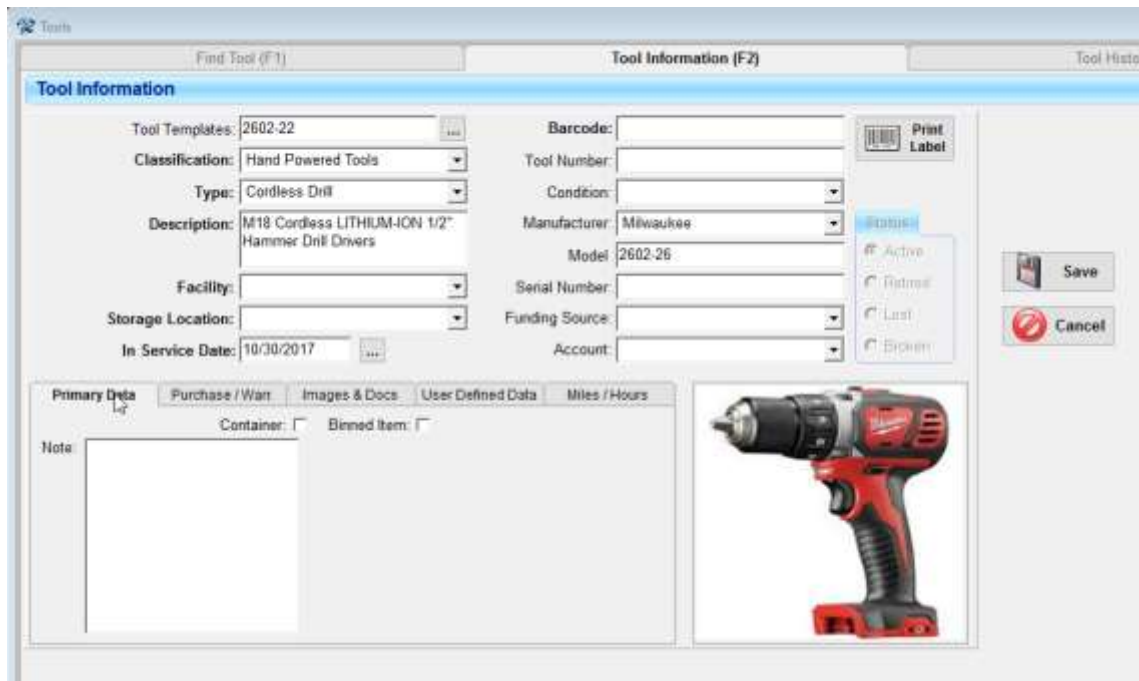
You can now use the Tool Template you just created to enter an individual tool. Click on the Tools icon, go the F2 (Tool Information tab) and click on "Add".

If you know the Template number, you can manually type it in the Tool Template field,



The screenshot shows the 'Tools' application window with the 'Tool Information' tab selected. The 'Tool Templates' field contains the value '2602-22'. Other fields include 'Classification', 'Type', 'Description', 'Facility', 'Storage Location', and 'In Service Date' (10/30/2017). A blue arrow points to the 'Tool Templates' field.

Next, press Tab or Enter and the Template information will populate,



The screenshot shows the 'Tools' application window with the 'Tool Information' tab selected. The 'Tool Templates' field is '2602-22'. The 'Classification' is 'Hand Powered Tools', 'Type' is 'Cordless Drill', and 'Description' is 'M18 Cordless LITHIUM-ION 1/2" Hammer Drill Drivers'. Other fields include 'Facility', 'Storage Location', 'In Service Date' (10/30/2017), 'Barcode', 'Tool Number', 'Condition', 'Manufacturer' (Milwaukee), 'Model' (2602-26), 'Serial Number', 'Funding Source', and 'Account'. There are buttons for 'Print Label', 'Save', and 'Cancel'. A red and black cordless drill is shown in the bottom right corner.

Finally, fill out the remaining information about that individual tool and give it a unique barcode and press Save.

If you do not know your Template or Master number, you can also look up all of your Templates by clicking on the ellipses box(...) next to the Tool Template field.

The screenshot shows the 'Tools' application window with the 'Tool Information' form. The 'Tool Templates' field is empty and has an ellipsis button next to it. A blue arrow points to this ellipsis button, and a tooltip labeled 'Tool Templates Lookup' is displayed over it. Other fields in the form include 'Classification', 'Type', 'Description', 'Facility', 'Storage Location', and 'In Service Date' (set to 10/30/2017).

Now, you can choose from a list of all of your templates,

The 'Find Tool Templates' dialog box is shown with the following search criteria: Manufacturer: All, Classification: All, Search Field: Tool Templates, Type: All. The search results table is as follows:

Tool Templates	Description	Manufacturer	Model Number
1234567	Employee Desk Computer	Dell	
123456789	Fluke 179 True RMS Digital Multimeter	Tasco	179E
1234578	Ipad Mini	Apple	
13245	iPad Mini 3 Silver 64GB	Apple	13245
2602-22	M18 Cordless LITHIUM-ION 1/2" Hammer Drill Drivers	Milwaukee	2602-26
521258693	Swivel chair, black Bomstad black	Funding Source	BN2500
525985266	Ipad Mini	Apple	P8900
5623641326	Arc Welder/Stick Welder	Stanley	500502
852589	Dell Latitude E10 Laptop, 1.8GHz, 512MB, 60GB HD, 14.1" LCD	Dell	NJ5600
858258	Dewalt Drill & Driver Kit	Dewalt	DCD771C2R
8956023	RUBBERMAID® UTILITY CARTS WITH DRAWER	Rubbermaid	2600
8988-20	Variable Temperature Heat Gun with LED Digital Display	Milwaukee	8988-20
987651321	Fluke Thermal Imager	Funding Source	70620968
A6457	Latitude 14 Rugged	Dell	A6457
BL0001E	Safety Glasses - Clear	Bolle	BL0001E

Double-click to Select Tool Templates Use % for wildcard 40 rows found

Select the template you want and press "OK". Fill out remaining tool information and Save.

Finally, you can create a template of an existing tool. Start in the Tools icon. Click on the Tool you want to use to create a new Template and go to the F2 (Tool Information) tab.

Press Edit, and in the Tool Template field, enter a new identifier for this Template,

Next, press Save. The below message will then pop-up asking if you would like to create a new Template with the existing information,

Press YES and you have now created a new Tool Template from an existing Tool.