TOOL TRACKING
QUICK START GUIDE

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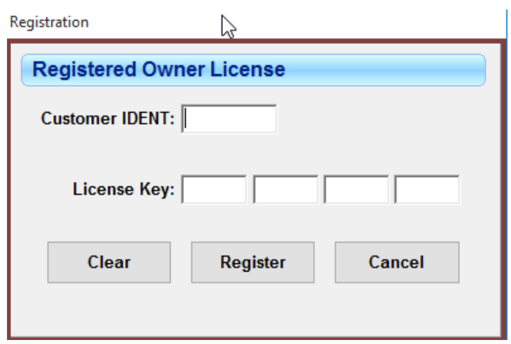
First, follow the instructions on the attached “PC Install” instructions to download the system. Once downloaded, follow the below instructions for general system setup.

Upon first downloading the system, you will be given a demo database that contains 20 Tools. Feel free to play around with this database and check items in and out. If you would like to add in your own Assets and have a clean database, follow the below instructions for entering your license key and customer ID number.

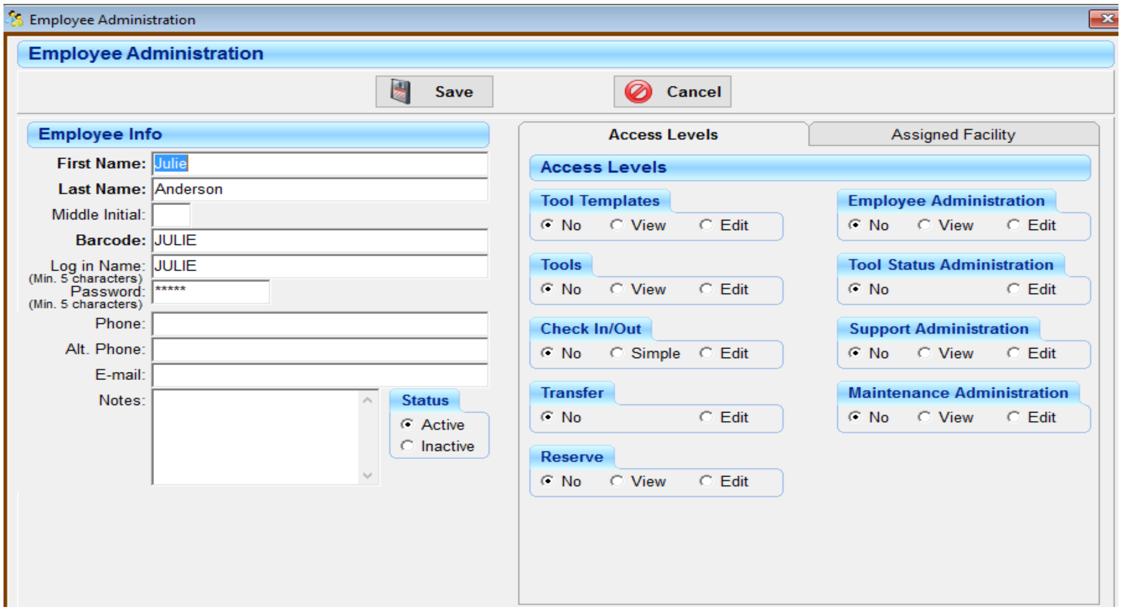
REGISTRATION

1. Login using the Admin login information
    a. Username: ADMIN
    b. Password: ADMINUSER
2. Once logged in, go to the ‘File’ tab at the top of the screen and go to ‘Registration Form.’ Here you will enter your license key and Customer ID number that was provided to you in your trial download email.



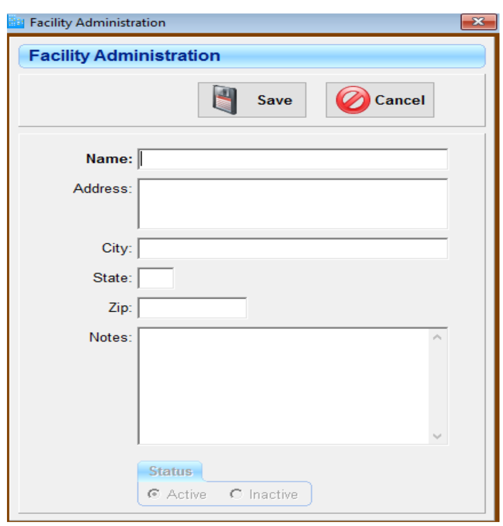
EMPLOYEES

1. Next, it is recommend you go to setup Employees in the system. This can be done under the ‘File’ tab under ‘Employee Administration’. Simply press “Add” and fill in the required Bolded Fields (first name, last name, barcode). The remaining fields contain supporting information that you can choose to enter or not. On the right hand side, you can choose the employees access levels. You will only give an employee access levels if they have a Login Name and Password and will be performing transactions. Remember, the system tracks not only who does the transaction, but also who the Tool is going to. That may or may not be the same person in certain situations. Remember, a barcode can be any set of numeric or alphabetical characters as long as they are unique in the system. We usually recommend between 4-7 characters for barcodes. In the example below, I named my barcode the actual employee name.

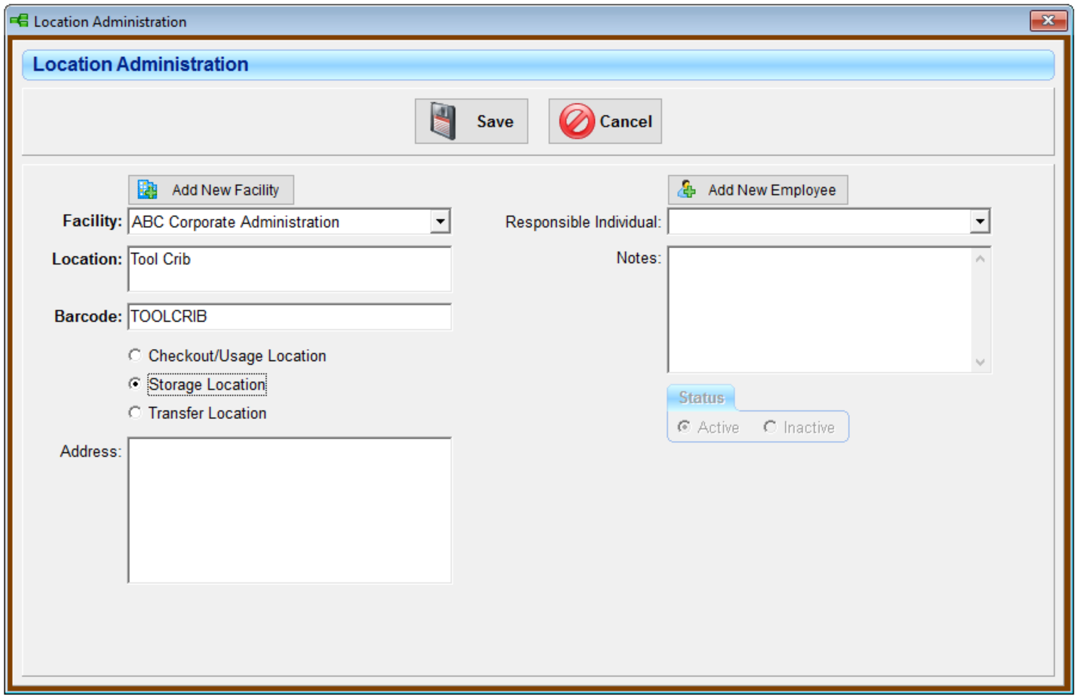


FACILITIES/LOCATIONS

1. Next, you will need to Enter 'Facilities' and 'Locations' into the system. Facilities and Locations have a Parent/Child relationship in the system. For example, you might have a facility called 'Warehouse' and specific locations within that facility such as 'Storage Room 101' and 'Tool Crib'. To first enter Facilities, go to the 'Support' tab and click on 'Facility Administration'. To enter a new Facility, click on 'Add' and fill out the corresponding information. Throughout the system, only the Bolded Fields are required. In this case, only Name. IF you will be checking items out to Job Sites, it is recommended that you create a fictitious location calls 'Jobs'. You will then list all of your specific job sites on the next step (step 5) under Locations for your 'Jobs Facility'. If you only plan on checking items out to Employees, you do not have to do this step (Jobs Facility and Locations).



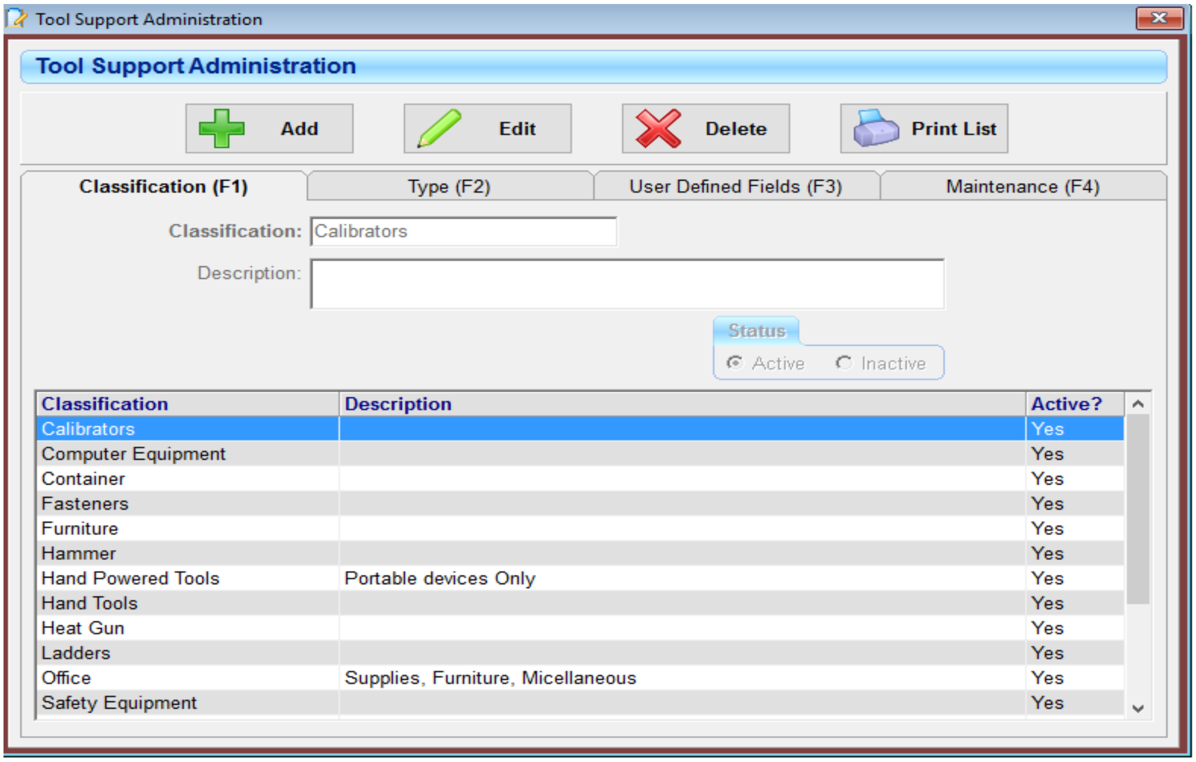
2. To enter Locations into the system, you will go to the 'Support' tab and click on 'Location Administration'. First, use the drop-down menu to pick the Facility that you would like to add a Location into and then click 'Add'. Here, you will need to give a Location name and Barcode. Remember, a barcode can be any set of numeric or alphabetical characters as long as they are unique in the system. We usually recommend between 4-7 characters for barcodes. In the example below, I named my barcode the actual location name.



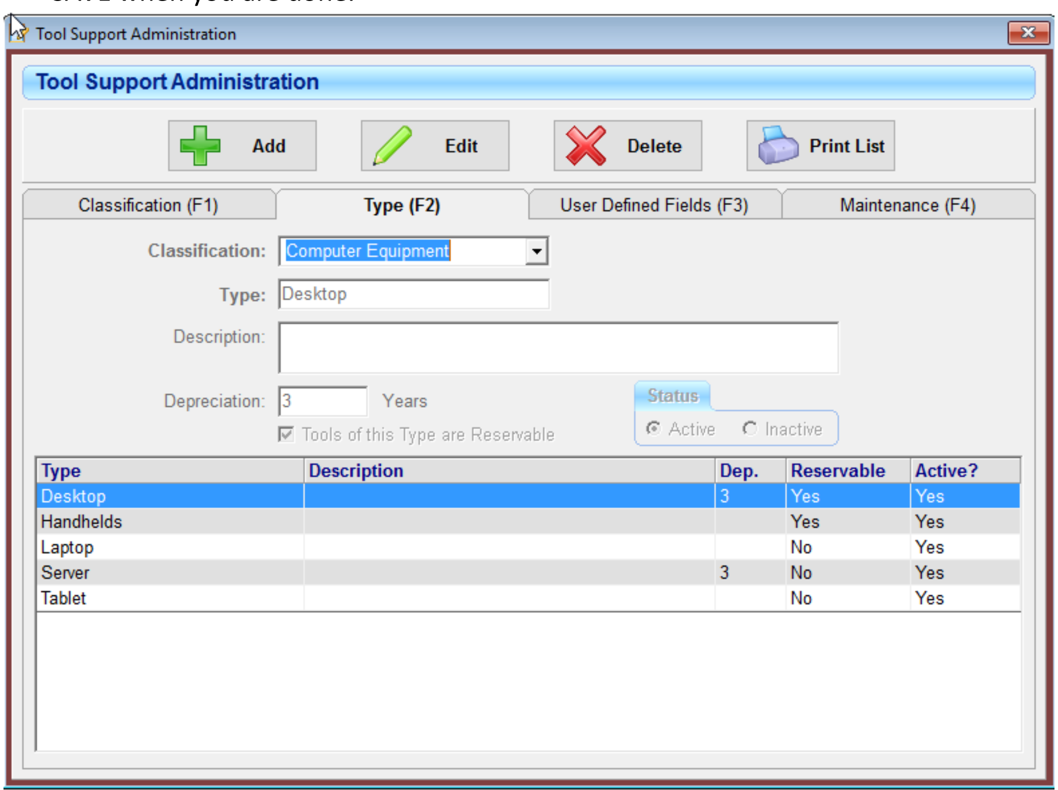
You will also need to choose whether that location is a 'Checkout/Usage Location' (such as a jobsite, etc) or a 'Storage Location' (where the item originates from or goes 'home' to). Remember, ALL tools in the system MUST have a Storage Location when being entered into the system. It is important to have a minimum of **one** Storage Location entered into the system before entering in Tools. If you plan to check Tools out to jobsites or locations, you will then enter it as a 'Checkout/Usage' Location. On the right hand side, you can also add in a Responsible Individual for a specific location (such as a Superintendent or Foreman) but it is not required.

CLASSIFICATIONS/TYPES

1. After you have entered your Facilities and Locations, you will need to enter your Classes and Types of Tools. Just like the Facilities and Locations, Classes and Types have a Parent/Child relationship. For example, you may have a Classification as 'Computer Equipment' and have multiple types underneath that such as "Desktops", "Laptops", "Tablets", etc. To enter new Classes and Types, go to the 'Support' tab and click on 'Tool Support Administration'. Click on 'Add' to add in new Classifications. SAVE when you are done. Please note that you are NOT yet adding in specific tools but just the categories that tools will fall under.



2. Once you have added in your Classifications, go to the second tab labeled "Types". Here you will enter your specific Types of Tools under each Class. . Click on 'Add' to add in new Types. SAVE when you are done.

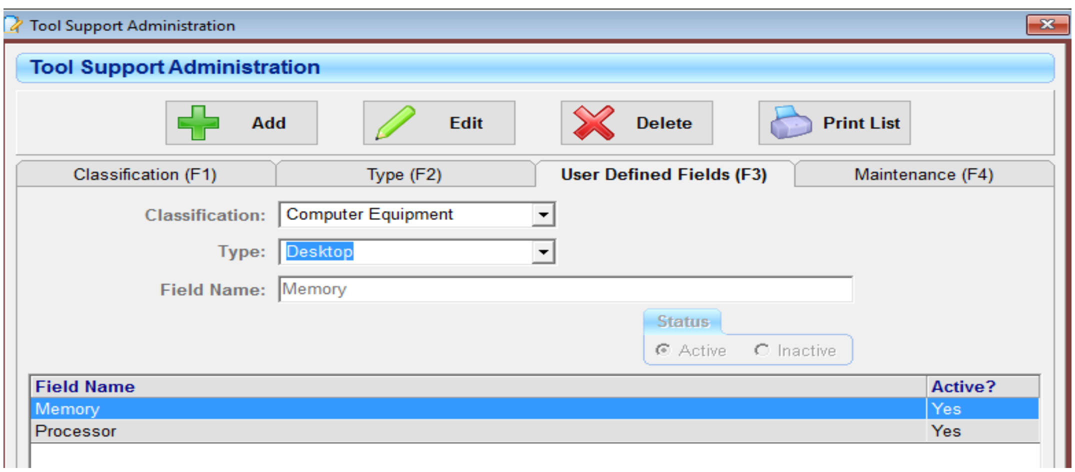


Here you can choose to enter an optional description, a depreciation period in the number of years, and whether Tools of this Type are Reservable or not.

USER DEFINED FIELDS AND MAINTENANCE

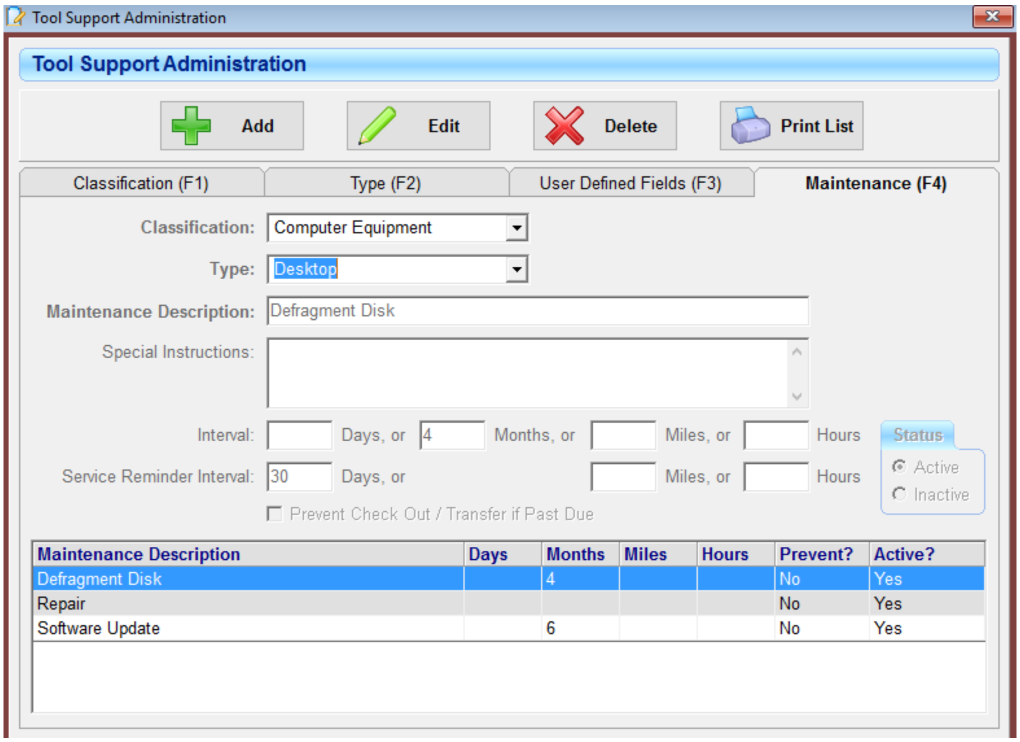
The following steps are for User Defined Fields and Maintenance. Neither of these options is required when using the system but are extra features. If you are just looking to do a general trial of the system without these features, you can skip to – Setup Options.

3. User Defined Fields (not a feature that is available in the Basic Edition) are used to track specific Types of Tools by extra or more detailed information. For example, I might have 100 computers in my database and I want to track the Processor Speed and Memory of each one because they are all different. Therefore, I will create User Defined Fields for each. . Click on 'Add' to add in new User Defined Fields. SAVE when you are done.



User Defined Fields are created for each TYPE of tool. Not for individual Tools.

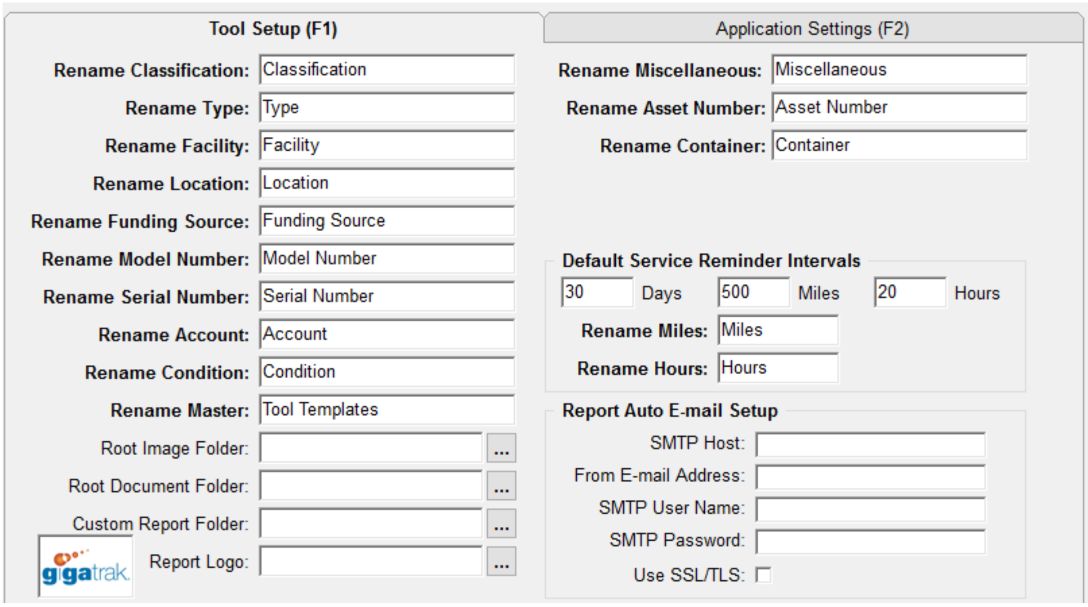
4. On the last tab, Maintenance (not a feature that is available in the Basic Edition), you can enter your Maintenance items for each Type of Tool. Just like User Defined Fields, Maintenance is entered for TYPES of Tools, not for each individual Tool. To Enter a Maintenance item, simply press “Add”, pick your Class and Type, enter your ‘Maintenance Description’, any Special Instructions, and an Interval on how often you would like this item to come due. You can also choose your Service Reminder Interval (how soon in advance you get notified) that maintenance is coming due. Last, click SAVE.



SETUP OPTIONS

1. Last, you can choose to rename different Title Fields in the system. This can be done under the ‘File’ tab under ‘Setup Options’. You must be logged in under the ADMIN login to access the Setup Options. The first tab is where you can rename any of the Title Fields. Renaming the fields will rename the fields throughout the entire system. Remember, if you choose to rename Class,

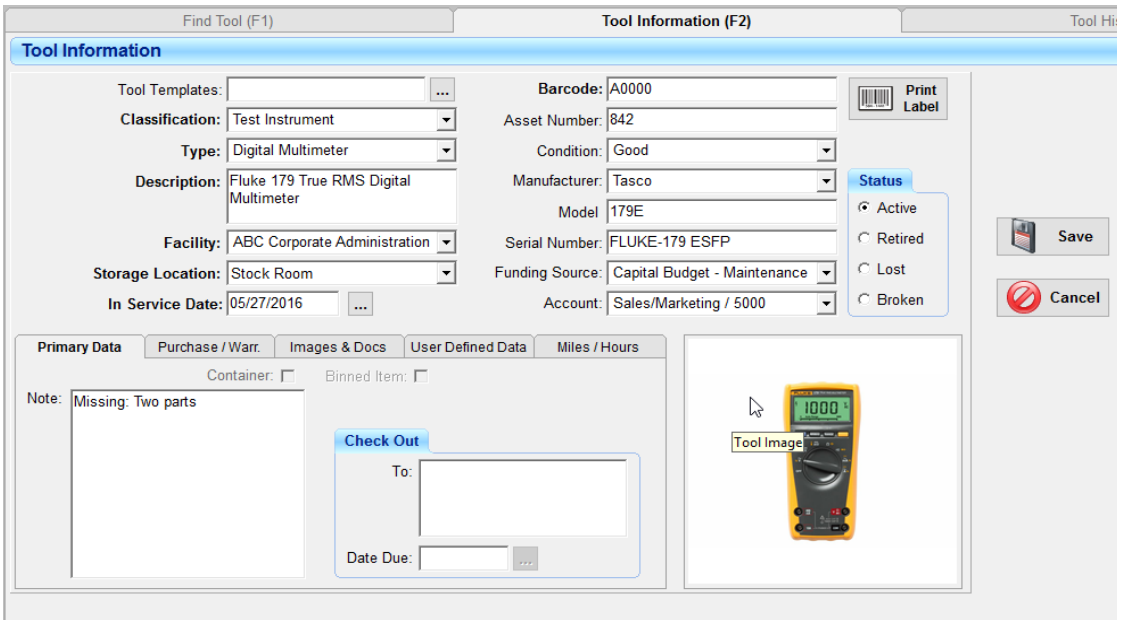
Type, Facility or Location, they will still have that Parent/Child relationship.



General System Setup is now COMPLETE! You are ready to enter Tools!

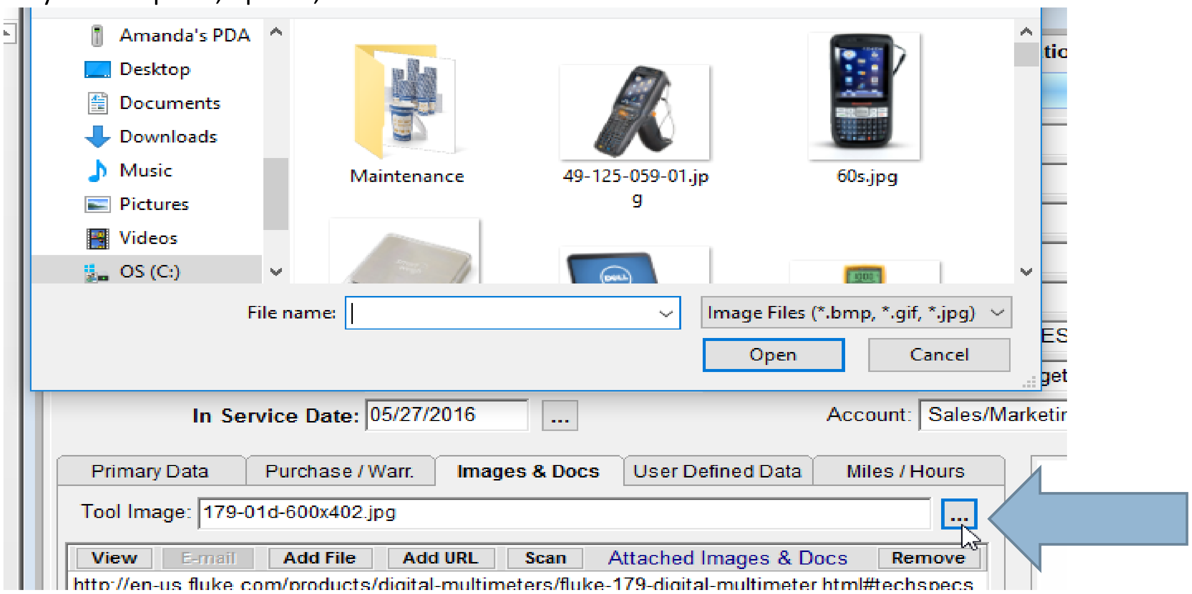
ENTER NEW TOOLS

1. To Enter Tools, first click on the “Tools” icon. Next click on the F2 tab ‘Tool Information’. Here is where you can enter all of your Tools manually (Import options are available in a very detailed excel/txt format. Please contact your sales rep for more information regarding import options). To Enter a Tool, click on ‘Add’ and you will be given a blank slate. Pick your Classification and Type from the drop-down menus (these were already created in Tool Support Administration), enter a description of the Tool, pick your Facility and Location from the drop-down menus, choose your In Service Date (it will automatically default to today’s date), and enter a barcode. This is all of the required fields for a Tool. Everything else is supporting information that you can choose to enter or not enter. Note that only Storage Locations will appear in the drop-downs here. Anything entered as a Checkout/Usage Location will not be available. Fill out as much information as you would like in the lower tabs as well, and then hit SAVE.



Continue to enter any new Tools this way. You can also ‘Copy’ a tool if you have more than one of it. When you hit the ‘Copy’ function, it will copy over everything associated with that tool except for Barcode and Serial number (the only two things that would be different). Fill in the remaining information and hit SAVE.

To add in a Tool image, first save that image locally to your computer. Then click on 'Images & Docs' and select the ellipses box to open your computer File Explorer. Find where the image is on your computer, open it, and hit SAVE.



SUPPORT

This quick-start guide is meant only for quick system setup and usage. Please refer to the User Manual for a more detailed explanation of the system. If you have specific questions, please contact support@gigatrak.com