SETUP OPTIONS –
ASSET TRACKING SYSTEM

INTRODUCTION

The following guide covers the back-end system Setup Options of the Asset Tracking System. Please note that if your system does not have a Setup Option covered in this guide, then your specific Edition of Asset Tracking does not have this feature. For specific questions that are not covered in this document, please contact support@gigatrak.com or 262-657-5500 ext. 2.

In order to access the Setup Options in the File tab, you MUST be logged in as the **ADMIN** user.

ASSET SETUP (F1)

The first tab of the Setup Options gives you the ability to rename title fields throughout the system, change the Service Reminder Intervals (Pro and School Edition Only), report auto email setup, and change the location of folders and logos. **Please note that if you change ANY of the title fields on this tab, it will be a system wide change!**

GigaTrak stresses the importance of being very careful with changing the first 4 title fields (Classification, Type, Facility, Location). Classification and Type have a parent/child relationship as do Facility/Location. Changing any of these fields can make the system extremely confusing.

Classification and Type refer to Categories and Sub-Categories that you will create in the system to structure your assets. Every single asset must have a Classification and Type. For example:

Classification (Category): Computer Equipment

Type (Sub-Category): Laptops

Type (Sub-Category): Tablets

Type (Sub-Category): Desktops

Type (Sub-Category): Printers

You will create these specific Classifications and Types under the Support tab → Asset Support Administration. *Not under the Setup Options.*

Facility and Location also have a parent/child relationship and refer to different locations. You should **NOT** rename Facility to your company name in the Setup Options. Facility is only the name of field. You can add your company name in as an actual Facility under Facility Administration in the Support tab. Renaming the Facility or Location field in the Setup Options is **NOT RECOMMENDED.**

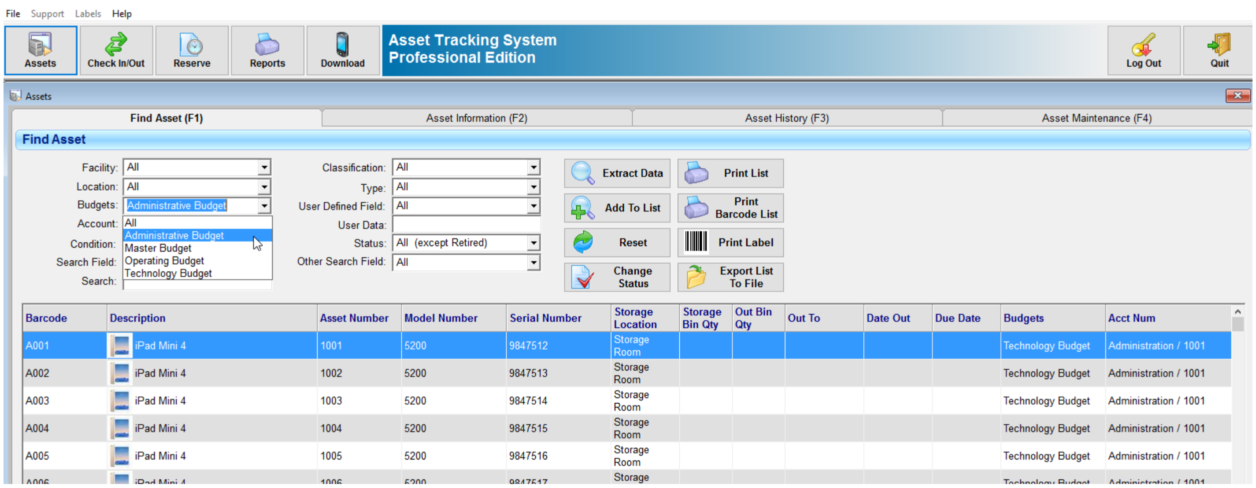
DROP-DOWN MENU FIELDS

The following title fields are drop-down menus that will allow you to sort your assets using filters. Any of them can be renamed but remember, they will end up being drop-down menus and will not have the ability to put in unique text. For example, a customer may rename “Funding Source” to “Budgets”.

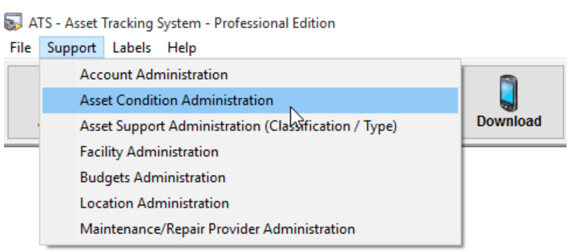
Funding Source

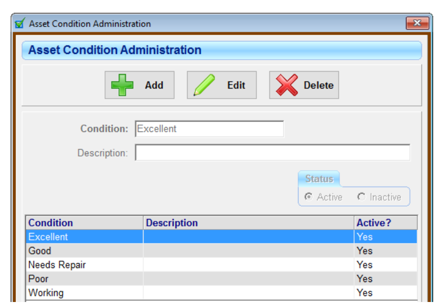
Condition

You will be able to filter by these fields in the F1 tab of the Assets icon,



To determine what is in the drop-down menu for each of these title fields, go to the Support tab to add in information for each.





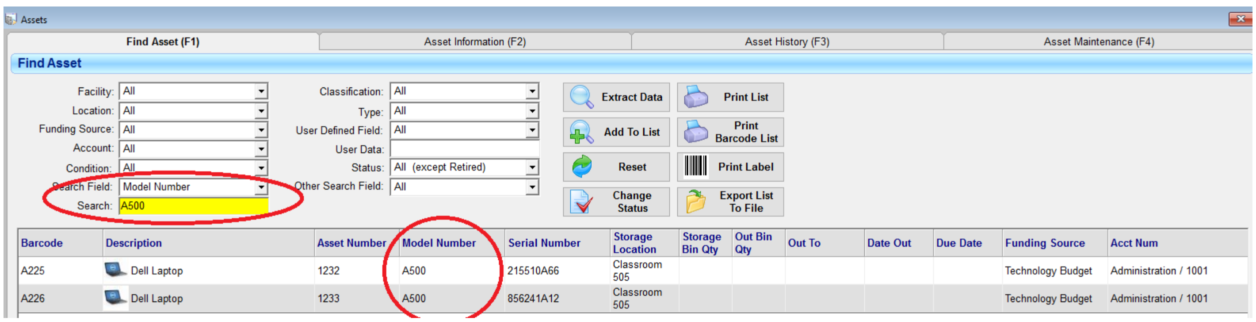
FREE TEXT FIELDS

The following title fields are free text fields,

-Model Number

-Serial Number

These fields will NOT have drop-down menus but you can still search by information in these fields on the F1 Tab of the Assets icon,

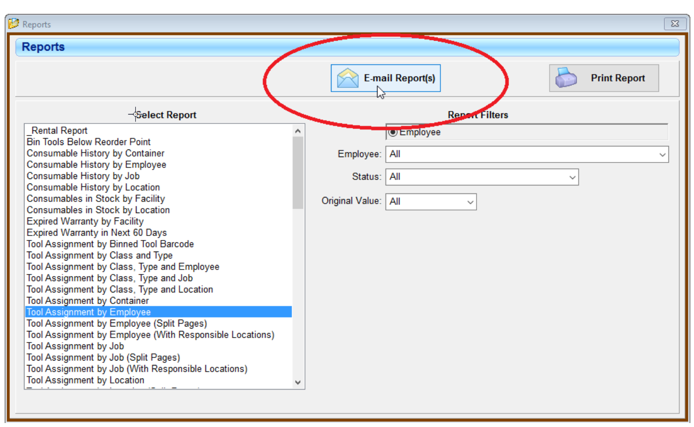


SERVICE REMINDER INTERVALS (PRO & SCHOOL EDITIONS ONLY)

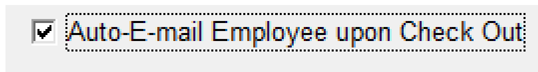
This section allows you to determine how soon in advance you are notified of scheduled maintenance coming due. For example, if you have a Software Update on a laptop once a year (every 12 months), how soon in advance will you be notified that it is coming due. The reminder is set in days.

REPORT AUTO EMAIL SETUP

This section must be filled out by your IT department if you would like to use this feature. The auto email setup allows you to press a single button but send out multiple reports to multiple different people. For example, in the Reports section, you can send out a report to every single individual that has assets checked out to them without having to email them individually. (Please note that each employee MUST have an email address listed in their employee profile for this to work). All editions have this feature. GigaTrak does NOT have the ability to automatically send out reports on a schedule.

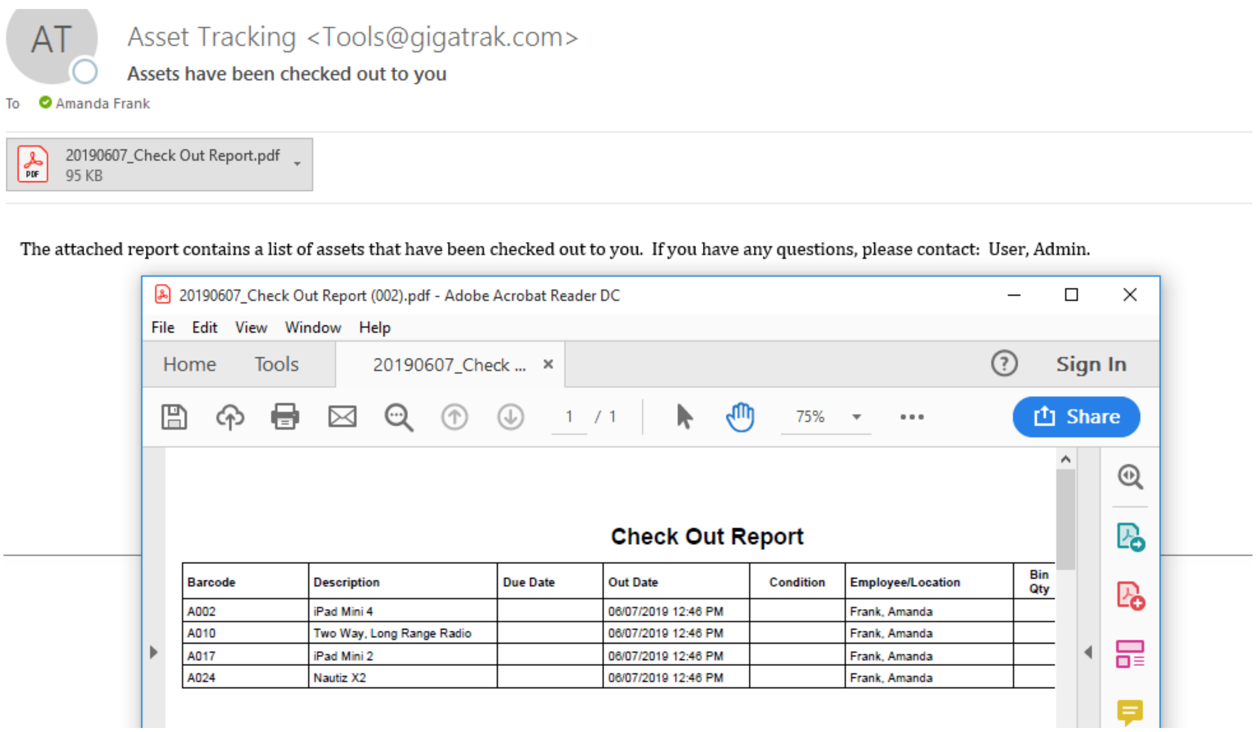


Pro and School Edition Only – The second part of the report auto email setup allows an *employee* to be automatically sent an email when checking out an asset. This feature acts as a receipt of the transaction. For this to work, you must have the following box marked on the second tab of the Setup Options, Application Settings (F2),



*Employee MUST also have an email address listed in their Employee Profile

Example of automatic Email and attached PDF Checkout Report,

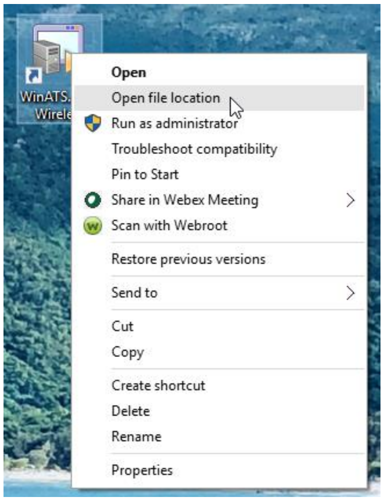


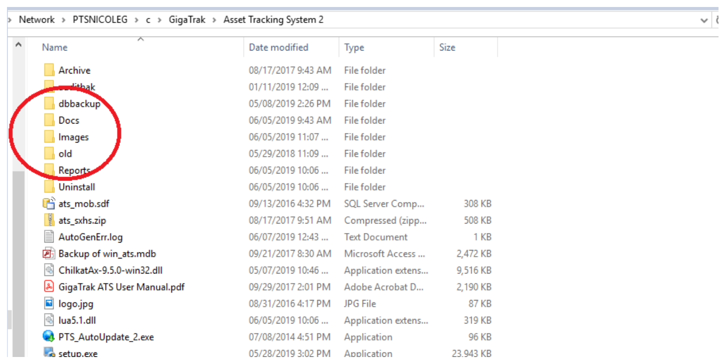
Barcode	Description	Due Date	Out Date	Condition	Employee/Location	Bin Qty
A002	iPad Mini 4		06/07/2019 12:46 PM		Frank, Amanda	
A010	Two Way, Long Range Radio		06/07/2019 12:46 PM		Frank, Amanda	
A017	iPad Mini 2		06/07/2019 12:46 PM		Frank, Amanda	
A024	Nautiz X2		06/07/2019 12:46 PM		Frank, Amanda	

**This feature ONLY works for transactions on the PC version of the system. Automatic emails and checkout reports do NOT work for any transactions done on the mobile application*

ROOT FOLDER (SELF-HOSTED SYSTEMS ONLY)

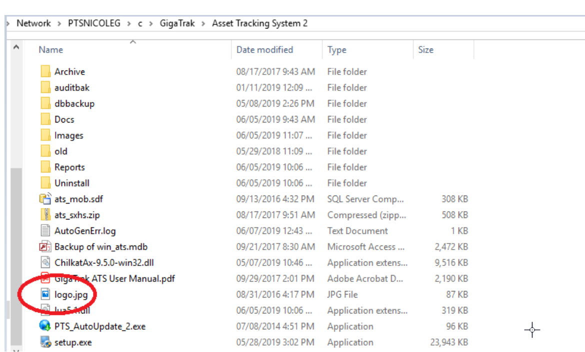
The following folders are automatically installed with your system: Root Image, Root Document, Custom Report. You can locate these folders by right-clicking on your shortcut icon for the system and clicking on “Open File Location”. This is the default location for each folder and where you put any custom reports, images, or documents.





Any custom reports, images or documents must first be put in their respective folder to use with system. However, you can change the default location for each of these folders here in the Setup Options. Click on the … (ellipses) lookup box to change the default location of each folder and where the system grabs from the file from.

You can also use this section to put in your company’s logo. The logo will appear on reports and lists throughout the system. You MUST place your logo in the systems file location. You can then click on the … (ellipses) lookup box to pull up the file explorer and select your logo from this location. Your company’s logo will appear in the box.



*Place your logo in the file location by right-clicking on the shortcut for your system, pressing “Open File Location” and pasting your logo in this file location.

APPLICATION SETTINGS (F2) TAB

A check marked box turns the setting on. Unchecked will turn the setting off.

SHOW DEPRECIATION

This feature allows depreciation features throughout the system such as depreciation on a single asset on the F2 Asset Information tab and the ability to run reports based off depreciation calculations for many assets. Leaving this option 'On' does not require the users to use the feature. It will simply be there as an option. You will need to agree to GigaTrak's disclaimer to turn on depreciation. To the right of this feature, you can also pick a preferred depreciation type out of the 6 different types of calculations in the system. Picking a specific type does not limit you to use other types. You will be able to change the depreciation type per individual asset on the F2, Asset Information tab.

ALLOW DELETE ASSET & PURGE HISTORY

This option is always recommended to keep off unless you know you specifically need to delete something. In that case, turn the option On, delete, and turn this option back off.

> Delete Asset – A 'Delete' button will appear on the F2 tab of the Assets icon allowing ANYONE with Asset Edit rights the ability to delete the asset. Whether it be on accident or malicious, you will not be able to restore the asset unless you perform a database back-up.
>
> Purge Asset History – Under the file tab, a "Purge History" option will appear allowing the user to clear all Asset History records prior to a certain date. Note that this option does not delete any assets or asset information, just the history (F3 tab) of that asset prior to the date to be cleared. You will not be able to recover purged history unless you do a full database backup. In addition, a 'Purge History' button will appear on the F3 (Asset History) tab allowing you to Purge an individual assets history. You will also be able to highlight an individual transaction on the grid of the F3 (Asset History) tab and delete a single line item.

RELOCATE ASSETS (VS. CHECK IN/OUT)

Turning on this feature is a completely different way of using the system. Instead of checking Assets out to a Person or Location from a home Storage Location, you simply relocate the asset to wherever it's going, and the asset does NOT have a home storage location. If you turn on the Relocate, you will NOT be able to use the Binned Assets feature in the system. Speak with your GigaTrak trainer prior to deciding on this option as it is not recommended to switch between Check in/out and Relocate once a decision has been made.

AUTO-POPULATE ASSET FIND TAB

When clicking on the Assets icon with this option on, your list of assets (on the F1 tab) will auto-populate in the grid below the filters. If this option is off, you will need to use the filters to specifically search for assets you are looking for and Extra the data.

School Edition – Setting will be labeled as "Auto-populate Asset and Member Find tabs" and refer to the F1 tab of the Assets icon and the F1 Tab of the Members icon.

DISPLAY EMPLOYEE BARCODES BEFORE NAMES

Having this option on will display an Employee Barcode before the Employee name and sort by barcode (in the Report Filters). If this option is off, the employee name will appear before the barcode and sort by name instead (in the Report Filters). If you view employees primarily by their names, leave this unchecked. If you prefer tracking employees by the Barcode ID, then mark the checkbox.

DISPLAY ACCOUNT NUMBERS BEFORE DESCRIPTIONS

Drop down menus for account (both on the Find Asset, F1 tab and in report filters) will display the account number before the description and sort by Account Number first instead of vice versa. If you view accounts primarily by descriptions, leave this unchecked. If you prefer tracking accounts by numbers, mark the checkbox.

AUTO-CREATE "REPAIR" MAINTENANCE TYPE (PRO & CONTRACTOR EDITION ONLY)

This option will insert a "Repair" maintenance item anytime a new Classification and Type of equipment is created. If you are tracking scheduled Maintenance and repairs on your Assets, this option is **HIGHLY** recommended to be turned on. All scheduled maintenance is entered by your company per Type of Asset with an interval on how often it comes due. However, any asset can break at any time. Instead of having to create a "Repair" Maintenance Type on every asset (no interval because it never comes due), the system will create a "Repair" for you and list it on every asset. If that asset breaks randomly and you wish to record the repair activities on it, you will have this option listed as a repair type.

SHOW MAINTENANCE DUE REPORT AFTER LOG IN (PRO & SCHOOL EDITION ONLY)

The Maintenance Due Report can pop-up upon logging in as a notification of what Assets need scheduled maintenance to be performed. Only assets within your "Service Reminder Interval" will show up on this report.

SHOW BIN ASSETS BELOW REORDER POINT AFTER LOG IN

Any Binned items, Consumable or Non-Consumable that are below a reorder point that you have set in the system will appear on this report and popup upon login letting you know you need to reorder.

REQUIRE CHECK IN BEFORE ANOTHER CHECK OUT

All transactions in the system are considered a check out or check in when moving assets around. When you check an asset out, it goes to either an Employee, Member, or Checkout Location. When the asset gets checked back in, it goes back to its home Storage Location. Every Asset **MUST** have a home Storage Location even if it never or rarely goes back there. If you want to 'transfer' an asset from one employee to another or one checkout location to another, that is considered a '*checkout to checkout'* and you will leave this option off. To ensure that every time an asset gets checked out, it gets checked back in to its home storage location before someone else can take it, you will turn this option on. This Setup Option would then require, Check Out, Check In instead of Checkout to Checkout to Checkout, etc.

SHOW MAINTENANCE ON HANDHELD (PRO & SCHOOL EDITION ONLY)

A Maintenance button will appear on your mobile application if you have this option on allowing you to send items to Maintenance, return from Maintenance and record all maintenance information on your device.

AUTO E-MAIL EMPLOYEE UPON CHECK OUT (PRO & SCHOOL EDITION ONLY)

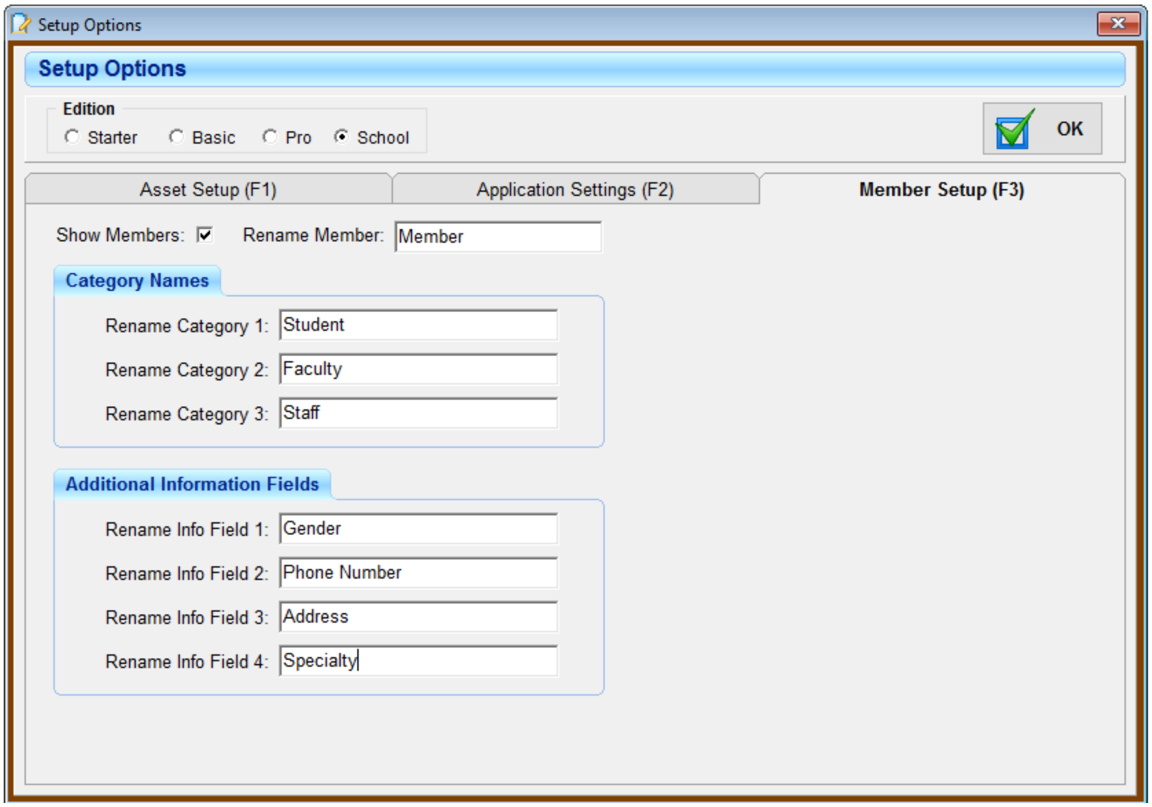
Employee will automatically be sent an email when they are checking out an assets on the PC version of the system. You MUST have an employee's email listed in the profile of the employee in Employee Administration. (Self-Hosted customers MUST also have the SMTP Host information setup on the first tab of the Setup Options for this to work). Must use Microsoft Outlook.

LOG IN/PASSWORD SETTINGS

- Allow Single Sign On – If your Windows login name and password on your computer matches your login name and password of the Asset Tracking System (under your Employee profile in Employee Administration), you will be automatically logged in without having to input a password.
- Allow Users to Change their password – By having this option on, any user that is currently logged in can change their password without having access to the Employee Administration Screen. A "Change Password" option will appear in the File tab allowing the user to change their password at any time.
- Enforce Password Policy – To make passwords more secure, enforce a password policy with any number of minimum requirements

MEMBER SETUP (F3) (SCHOOL EDITION ONLY)

The School Edition of the System allows users to check assets out to one of 3 additional fields besides for Employees and Checkout Locations. These 3 additional fields can be named here. You can also rename Members as a whole under the “Rename Member” field. Example of fields being renamed is listed below. Four additional fields are also created here and will be asked for when creating a brand-new Member in the system. All fields can be searched on.



To save Changes on all 3 tabs of the Setup Options, 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 X in the upper right corner of the screen.

For any additional questions regarding the Setup Options for Asset Tracking,

contact our support team at

262-657-5500 ext 2

Or

Email support@gigatrak.com