



**SETUP OPTIONS –
TOOL TRACKING SYSTEM**



INTRODUCTION

The following guide covers the back-end system Setup Options of the Tool Tracking System. Please note that if your system does not have a Setup Option covered in this guide, then your specific Edition of Tool 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.

TOOL SETUP (F1)

The first tab of the Setup Options gives you the ability to rename title fields throughout the system, change the default Service Reminder Intervals (Pro and Contractor 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 tools. Every single tool 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 → Tool 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 tools 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. Many customers will rename “Account” to “Departments” as an example.

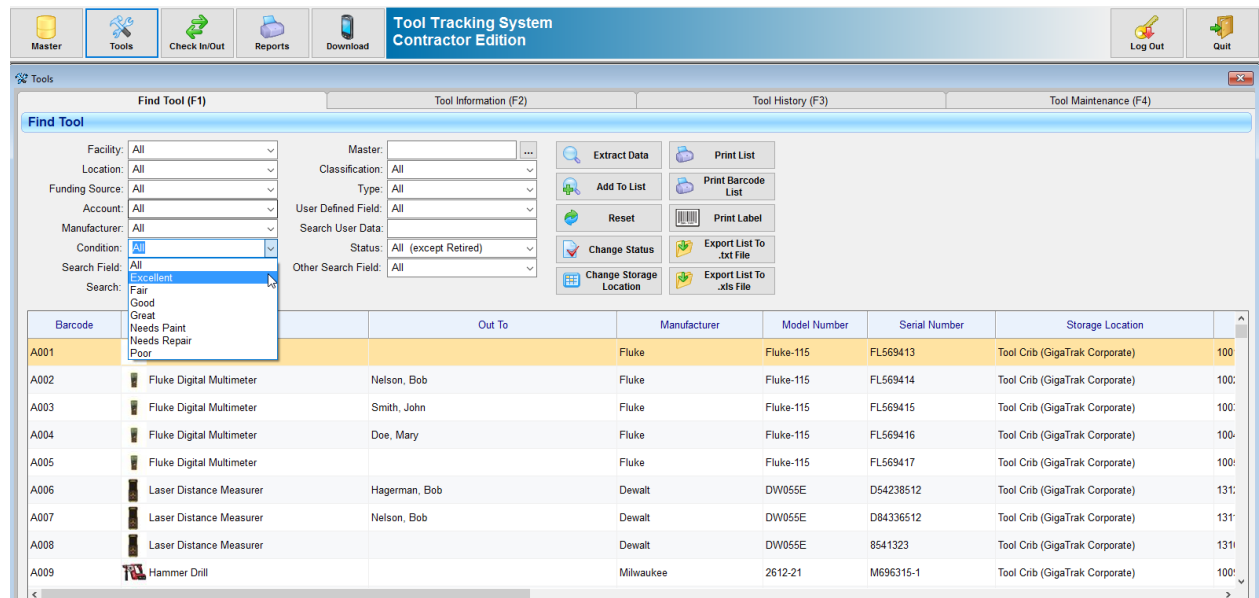
Funding Source

Account

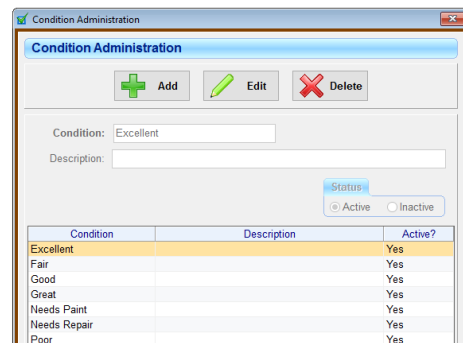
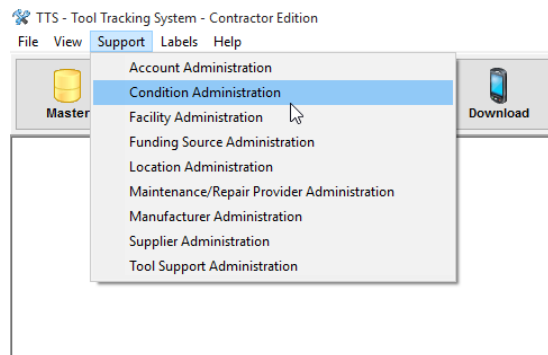
Manufacturer

Condition

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

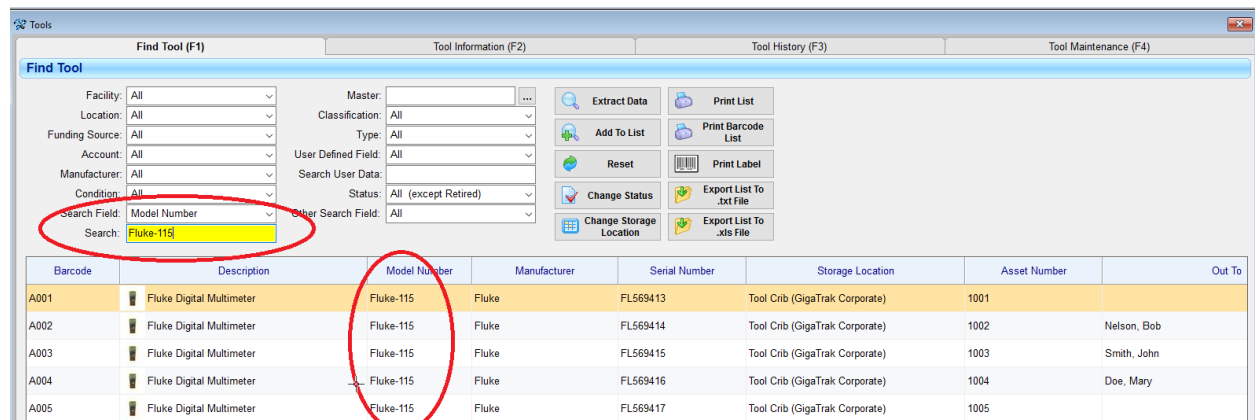
-Model Number

-Serial Number

-Asset Number (Asset Number is often used a back-up to the barcode. If your company already has some form of numbering scheme in place and then implements a barcoded system with different numbers, the Asset Number should be used for your original numbering scheme as a back-up to the barcode. The system will allow you to checkout by either Asset Number or Barcode Number).

-Miscellaneous

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



Barcode	Description	Model Number	Manufacturer	Serial Number	Storage Location	Asset Number	Out To
A001	Fluke Digital Multimeter	Fluke-115	Fluke	FL569413	Tool Crib (GigaTrak Corporate)	1001	
A002	Fluke Digital Multimeter	Fluke-115	Fluke	FL569414	Tool Crib (GigaTrak Corporate)	1002	Nelson, Bob
A003	Fluke Digital Multimeter	Fluke-115	Fluke	FL569415	Tool Crib (GigaTrak Corporate)	1003	Smith, John
A004	Fluke Digital Multimeter	Fluke-115	Fluke	FL569416	Tool Crib (GigaTrak Corporate)	1004	Doe, Mary
A005	Fluke Digital Multimeter	Fluke-115	Fluke	FL569417	Tool Crib (GigaTrak Corporate)	1005	

CONTAINER

The “Container” field refers to a feature in the Tool Tracking System where you can barcode a Container and then put individually barcoded items inside of that Container and move it around as a whole. A ‘Container’ could be a job box, toolbox, gang box, vehicle, etc. You could then check out tools to that Container and scan the Container to a person or location and everything inside moves with it. Container can be renamed here in the Setup Options if needed.

MASTER

The “Master” is an optional feature in which you can create a list of commonly purchased tools or tools that you have a lot of. The Master function is NOT a list of tools you actually have in the database but a template for a tool. Basic information about a tool is listed in the Master (Class, Type, Description, Master Number). Many people rename Master to “Template” or “Catalog”. Please refer to the “Master” document for more information regarding this feature.

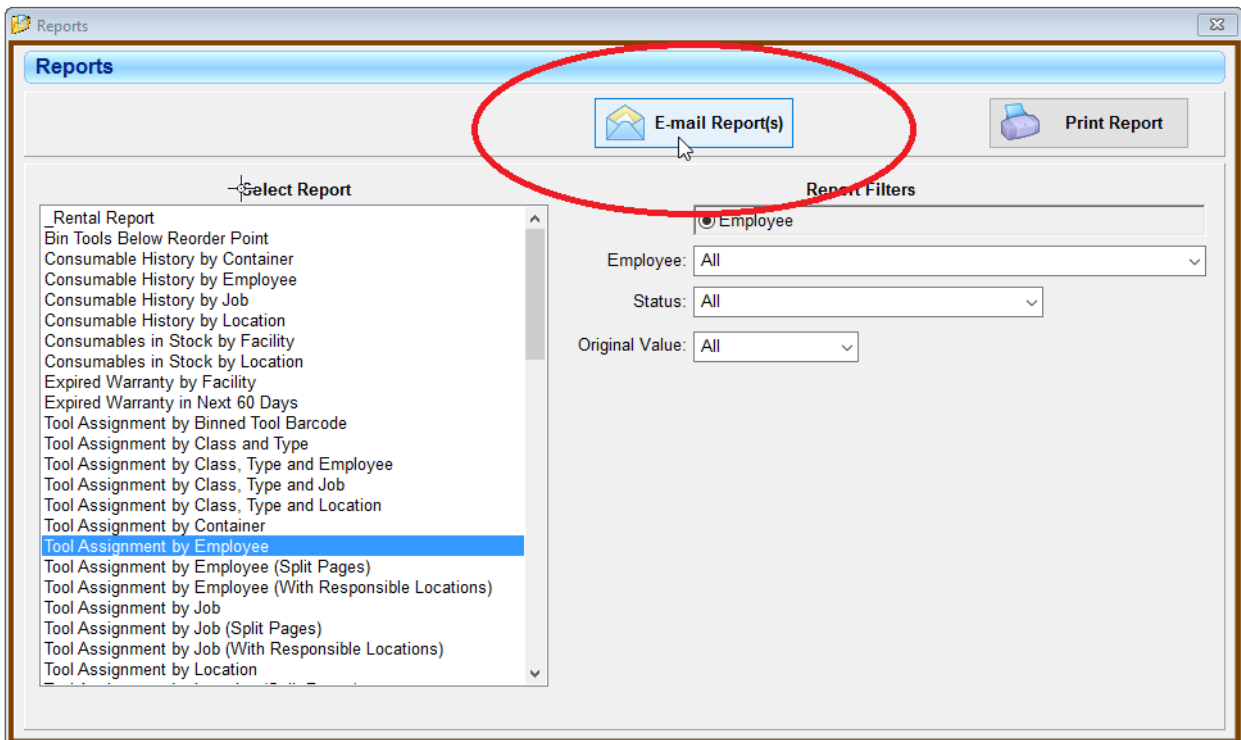
DEFAULT SERVICE REMINDER INTERVALS (PRO & CONTRACTOR ONLY)

This section allows you to determine how soon in advance you are notified of scheduled maintenance coming due. For example, if you have a Safety Certification on a tool once a year (every 12 months), how soon in advance will you be notified that it is coming due. The reminder can be set in Days, Miles, or Hours. You can also potentially rename Miles or Hours in this section. If you choose to rename either of these fields, it must be a numerical value you are tracking. Examples could be “Spins, Cycles, Count Hits, etc).

Changing the Default Service Reminder Interval here will apply to all tools in the system. However, you can change the reminder interval for Maintenance per TYPE of tool in Support → Tool Support Administration → F4 Maintenance tab, when creating Maintenance Types. As an example, all tools in the system might have a 30 day Maintenance Reminder Interval but all of my Vehicles (Classification) → Trucks (Type) have a reminder interval of only 2 days for their Oil Change.

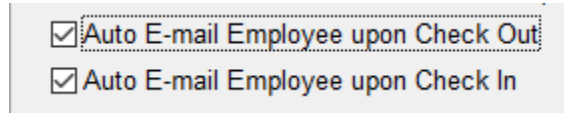
REPORT AUTO EMAIL SETUP

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 tools 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.



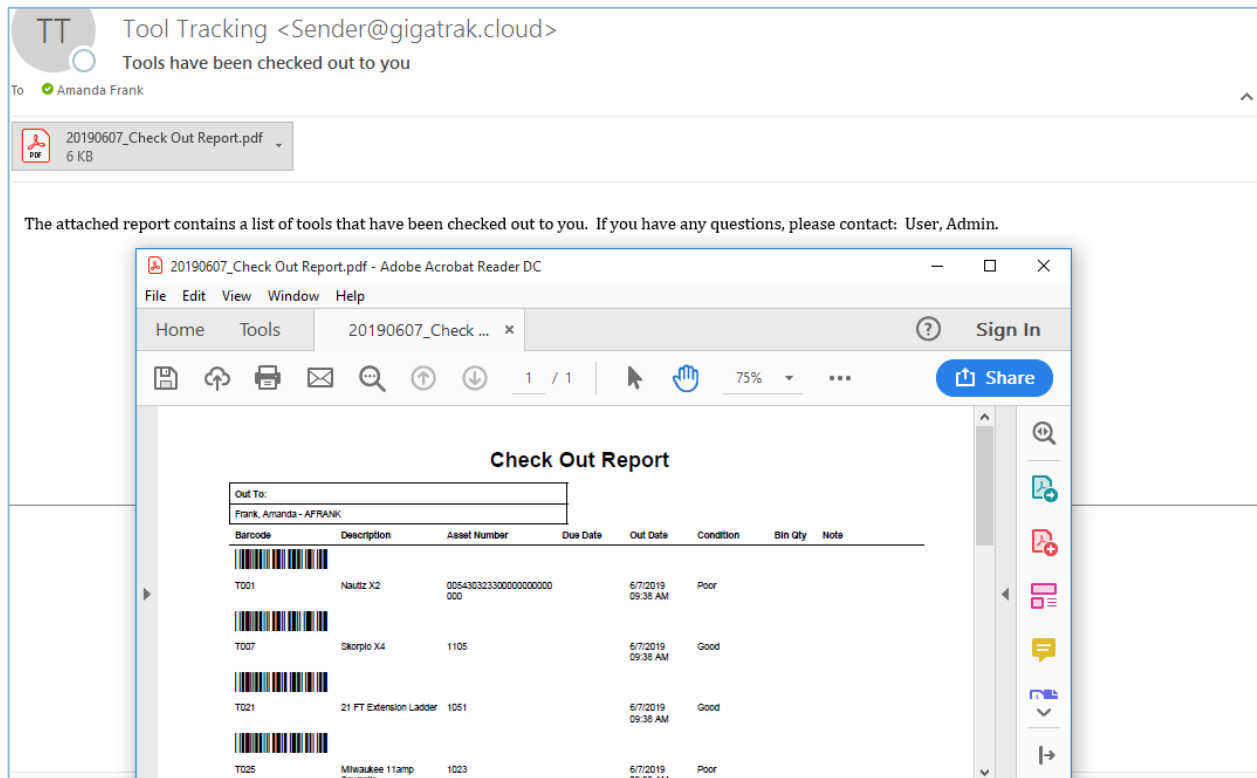


Pro and Contractor Edition Only – The second part of the report auto email setup allows an *employee* to be automatically sent an email when checking a tool out and back in. This feature acts as a receipt of the transaction. For this to work, you must have the following boxes marked on the second tab 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,

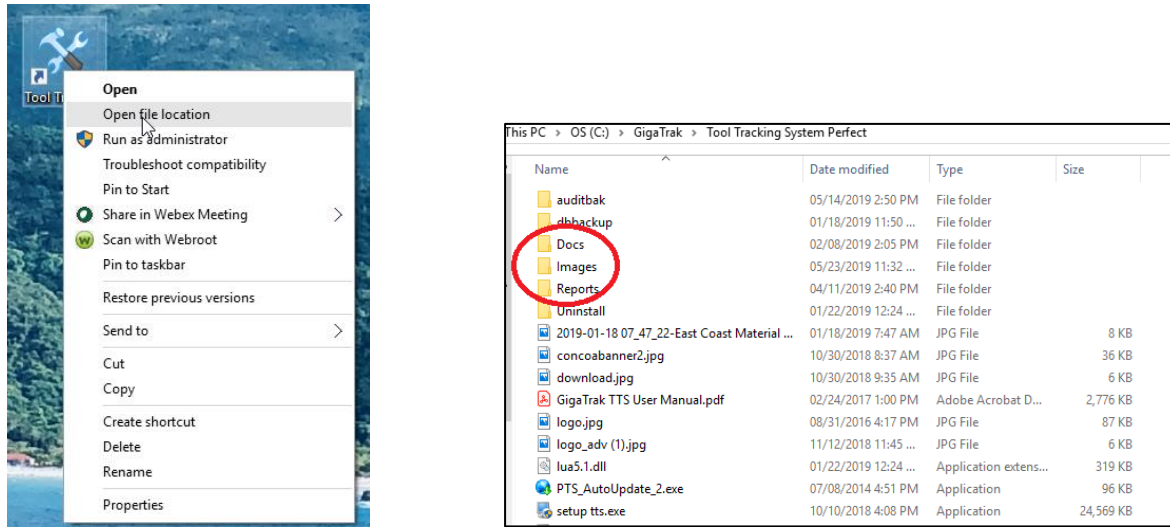


**This feature ONLY works for transactions on the PC version of the system. Automatic emails and checkout/in reports do NOT work for any transactions done on the mobile application*

ROOT FOLDER (SELF-HOSTED SYSTEMS ONLY)

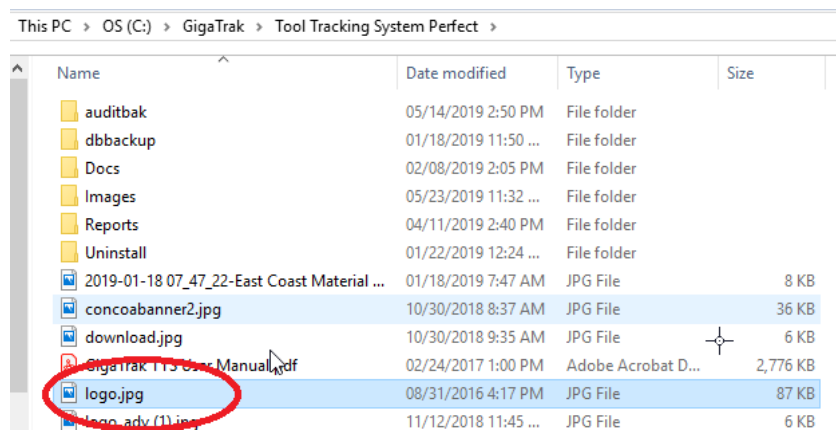
The following folders are automatically installed with your system: Root Image, Root Document, Custom Report. You can locate these folders by right-clicking on your shortcut icon for the system and

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.

Cloud-Hosted Customers will need to place their Logo in the Cloud File Browser



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 tool on the F2 Tool Information tab and the ability to run reports based off depreciation calculations for many tools. 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 5 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 tool on the F2, Tool Information tab.

ALLOW DELETE TOOL, DELETE AUDIT, & PURGE TOOL 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 Tool – A 'Delete' button will appear on the F2 tab of the Tools icon allowing ANYONE with Tool Edit rights the ability to delete the tool. Whether it be on accident or malicious, you will not be able to restore the tool unless you perform a database back-up.

Delete Audit – Allows the ability to clear an Audit from the Download/Audit page. (Cloud users will also have a 'Clear Audit' access level in Employee Administration)

Purge Tool History – Under the file tab, a "Purge History" option will appear allowing the user to clear all Tool History records prior to a certain date. Note that this option does not delete any tools or tool information, just the history (F3 tab) of that tool 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 (Tool History) tab allowing you to Purge an individual tools history. You will also be able to highlight an individual transaction on the grid of the F3 (Tool History) tab and delete a single line item.

AUTO-POPULATE TOOL FIND TAB

When clicking on the Tools icon with this option on, your list of tools (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 tools you are looking for and Extract the data.

Contractor Edition – Setting will be labeled as "Auto-populate Find tabs" and refer to the F1 tab of the Tools icon, the 'Members' icon, and the 'Master' icon.

CASCADE MASTER CHANGES TO TOOLS

Any changes made to a Master Template, will cascade changes down to any barcoded tools that are using the Master Number in the system. Turn this option off to Update Master information but keep



current tools with the old Master information. **Caution: Changes made to the Master may RESET User-Defined data to the values set within the Master.**

AUTO-GENERATE TOOL BARCODE IF LEFT BLANK

A Tool Barcode is a required field in the system. Every tool must have a unique barcode. If this option is on, and you leave the barcode field blank, the system will auto-generate a barcode for you. Use this option if you decide to design and print your own barcodes. (You can always edit and change the barcode if needed after auto-generating).

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 Tool, 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 Tools, this option is HIGHLY recommended to be turned on. All scheduled maintenance is entered by your company per Type of Tool with an interval on how often it comes due. However, any tool can break at any time. Instead of having to create a “Repair” Maintenance Type on every tool (no interval because it never comes due), the system will create a “Repair” for you and list it on every tool. If that Tool 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 & CONTRACTOR EDITION ONLY)

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

SHOW BIN TOOLS 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 tools around. When you check a tool out, it goes to either an Employee, Member, or Checkout Location. When the tool gets checked back in, it goes back to its home Storage Location. Every Tool **MUST** have a home Storage Location even if it never or rarely goes back there. If you want to 'transfer' a tool 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 a tool 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 TRANSFER

The word Transfer in our system does not mean what most people think it means. The Transfer function is **ONLY** transferring between multiple Facilities. For example, if you have multiple locations throughout the county, you might transfer a Tool from Facility 1 to Facility 2 for them to keep. You can only Transfer to a Facility with Storage Locations. You cannot Transfer to an employee or checkout location. Many companies with Shipping and Receiving docks will use the Transfer function. Transfer locations must also be setup under Location Administration in the Support Tab to use this feature.

ALLOW DUPLICATE ASSET NUMBERS

Assets Numbers are often used as a back-up to the barcode. All barcodes need to be unique therefore all Asset Numbers should be unique as well. However, having this option on allows you to duplicate Asset Numbers. For example, if you wanted to say all my drills have Asset Number "255" and look them up as a group, this option would allow this. If you do allow duplicate asset numbers, you cannot use the asset number in place of the barcode for checking tools in/out.

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

Employee will automatically be sent an email when they are checking out a tool 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.

AUTO E-MAIL EMPLOYEE UPON CHECK IN (PRO & CONTRACTOR EDITION ONLY)

Employee will automatically be sent an email when they are checking in a tool 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.

ALLOW TOOLS WITH A LOST STATUS TO BE CHECK OUT

With this option on, any tool with a status marked as "Lost", will automatically have its status changed back to "Active" if the tool is scanned for Checkout. You will **NOT** be notified that the system is

changing the status as it does it automatically. Keeping this option off will notify the user that they cannot check out the item because it is currently Lost.

REQUIRE PURCHASE ORDER WHEN ADDING OR EDITING TOOLS

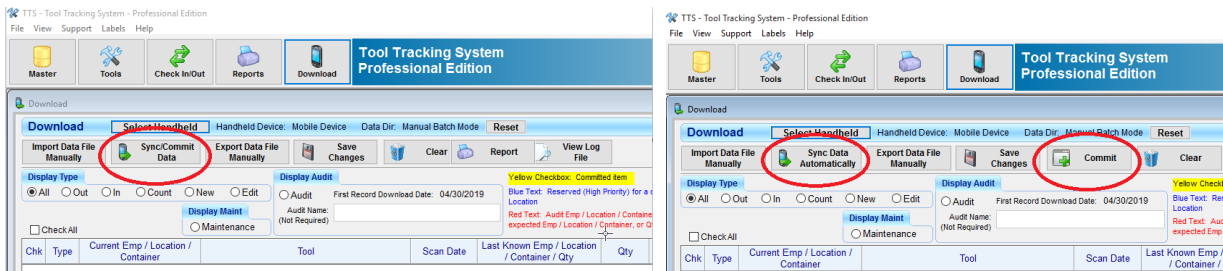
The “PO Number” field (in the Purchase/Warr. Tab) will be required on the Tool Information (F2) tab when adding or editing a tool.

SHOW MAINTENANCE ON HANDHELD

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 COMMIT DOWNLOADED DATA UPON SYNC (SELF-HOSTED SYSTEMS ONLY)

Transactions performed on a mobile handheld device through Batch Mode (Android or Windows Mobile OS) need to be synced with the computer to update the system with the transactions. Once the sync is performed, you will then need to review and Commit the data to the system. Having this option on, **AUTOMATICALLY** commits all transactions to the system upon sync. You will not be allowed to pick and choose which transactions you would like to Commit.



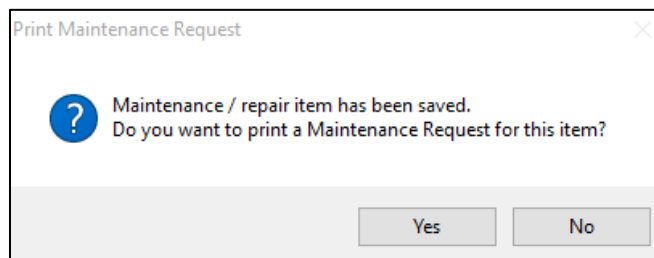
^Option ON – SYNC/COMMIT is one button Option OFF – Sync & Commit are separate buttons^

If unchecked, the process to sync & Commit data will be “Sync”→”Review”→”Commit”→”Sync”.

If checked, the process to sync & Commit data will be “Sync/Commit”.


PROMPT TO PRINT MAINTENANCE REPORT WHEN SAVING MAINTENANCE

When recording/adding in Maintenance transactions on the PC version of the system (Tool Maintenance F4 tab), you will be asked to Print out Maintenance request for the transaction. Turning this option off will not ask you to Print a Maintenance Request.





SHOW BARCODE SEARCH ON DEVICE APPLICATION (CLOUD-HOSTED AND SQL WEB-SERVICE CUSTOMERS ONLY)

 A magnifying glass will appear in several different places through the mobile app (Android or iOS apps) allowing the user to choose from a list of Employee/Location/Container/Member if they do not know the barcode. Having this option off will not allow the user to look up this information and they will be required to manually enter or scan a barcode for an Employee/Location/Container/Member when needed.

FIND TOOL GRID AUTOSIZE MODE

Choose how many lines will show on the F1, Find Tool tab of the Tools icon in the grid.

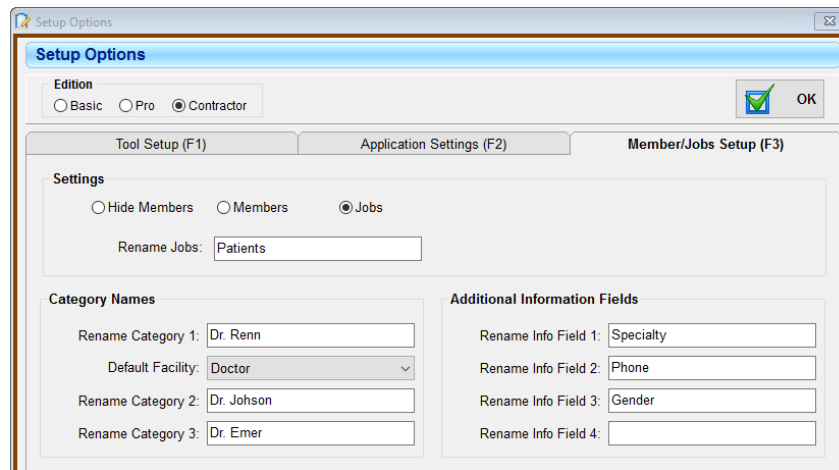
LOG IN/PASSWORD SETTINGS

- Allow Single Sign On – If your Windows login name and password on your computer matches your login name and password of the Tool Tracking System (under your Employee profile in Employee Administration), you will be automatically logged in without having to input a password.
 - Cloud Customers – You will still need to login to the RDP (Remote Desktop). After that, if your Windows username and password matches your username and password in the Tool Tracking System, you will be automatically logged in.
- 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

MEMBERS/JOBS SETUP (F3) (CONTRACTOR EDITION ONLY)

The Contractor Edition of the System allows users to check tools out to one of 3 additional fields besides for Employees and Checkout Location. These 3 additional fields can be named here. You can also rename Members as a whole under the “Rename Jobs/Members” 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.

*If you use choose ‘Jobs’ as the main category instead of Member (even if it’s renamed), the first Category (Category 1) will be required to have a Default Facility. This is because the system allows you to create a brand-new “Job” on the fly right upon checkout on the PC or mobile app without having it in the system already. Therefore, a default facility needs to be attached to the first Category as adding in brand-new “jobs” upon checkout will auto-create a new job in the system.



The screenshot shows the 'Setup Options' window with the 'Member/Job Setup (F3)' tab selected. At the top, the 'Edition' is set to 'Contractor'. Below this, there are three tabs: 'Tool Setup (F1)', 'Application Settings (F2)', and 'Member/Job Setup (F3)'. The 'Settings' section has three radio buttons: 'Hide Members', 'Members', and 'Jobs', with 'Jobs' selected. A text field 'Rename Jobs:' contains the value 'Patients'. The 'Category Names' section has three rows, each with a 'Rename Category' field and a 'Default Facility' dropdown. The first row is 'Dr. Renn' with 'Doctor' selected. The second row is 'Dr. Johson' and the third is 'Dr. Emer'. The 'Additional Information Fields' section has four rows, each with a 'Rename Info Field' text field. The first row is 'Specialty', the second is 'Phone', the third is 'Gender', and the fourth is empty.

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 Tool Tracking,
contact our support team at

262-657-5500 ext 2

Or

Email support@gigatrak.com