ASSET TRACKING SYSTEM QUICK START GUIDE

INSTALLATION

STEP 1

Follow the instructions to install the system using the "PC Installation Guide" provided to you. You can install the system with an Access database (built-in to the system) or with a Sequel Server database (must be managed separately).

REGISTRATION

STEP 2

The Registration Form will appear with pre-populated data. To use the system with a demo database (Access Only), register the information that pre-populates. If you were given a timed demo key or have purchased the system and received a license key in your Order Acknowledgement Email, copy and paste your license information over the top of the pre-populated information and register. Upon registering, the system will unlock the required features and licenses.

If you have registered with an Access database a notification will ask if you would like to start with a clean database (no data) or continue with the data that is already in the system (demo database or any information you have entered in to the system). If you have immediately installed with a Sequel Server back-end, there is no demo database.

CREATE A USER/LOGIN

STEP 3

Depending on your installation (Access vs. SQL), you will be asked to create a new user *or* login. If asked to login, you can use the following credentials

Username: ADMIN

Password: ADMINUSER

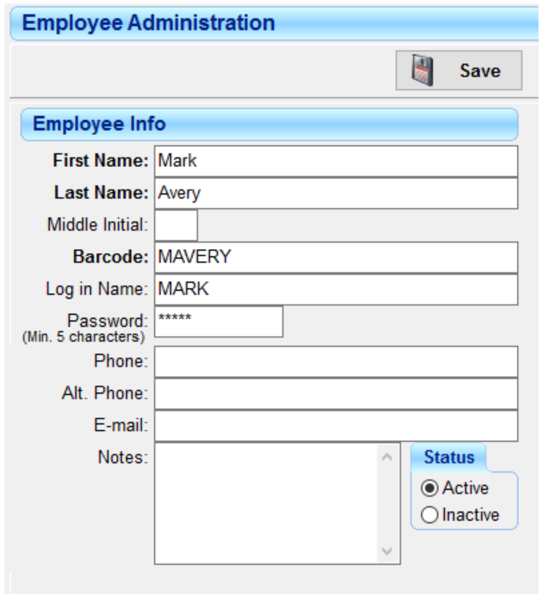
Otherwise, create a user login for yourself. This user is automatically given Edit rights to all functions (except the Setup Options; only Admin has access to the Setup Options).

ENTER EMPLOYEES

STEP 4

Go to File→Employee Administration to manually add in New Employees to the system. Press "Add". Bolded fields are required. At a minimum, an employee will have First Name, Last Name and Barcode.

The barcode field can be anything you like as long as it's unique. If you already have some form of employee ID number or barcode, you should incorporate it here in the system. If not, you can make up a barcode (unique set of characters). We recommend between 4-7 characters for a barcode.

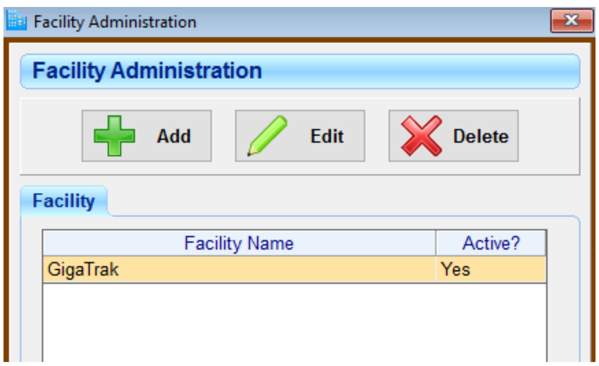


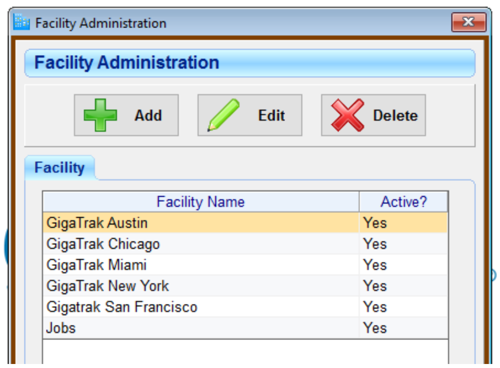
If the employee will be logging in to the system and performing transactions (on the PC or mobile app), they will need to be given a login name and password and have their access levels set on the right-hand side. If the employee will not be logging in but you would like to check items out to them, only the bolded fields are required.

FACILITIES/LOCATIONS

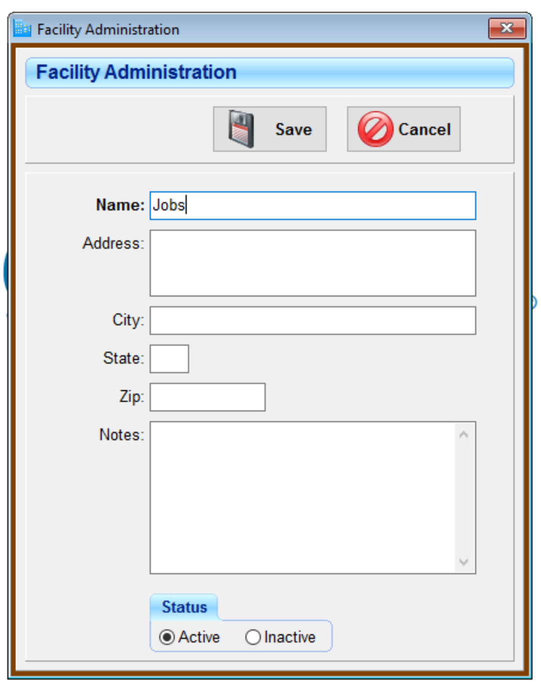
STEP 5

After your employees have been entered, it is recommended you create your Facilities and Locations in the system. Go to Support→Facility Administration. Every single Asset must have a facility and storage location (home location). You will not be able to enter new items without first creating these locations. Facilities and Locations have a Parent/Child relationship. For example, your House could be a Facility and all the rooms within your house are specific locations. If you have just a single company location (as many do), you might enter your company name as a Facility. If you have multiple locations, they will each be their own Facility. Examples of both are below (one facility vs many).

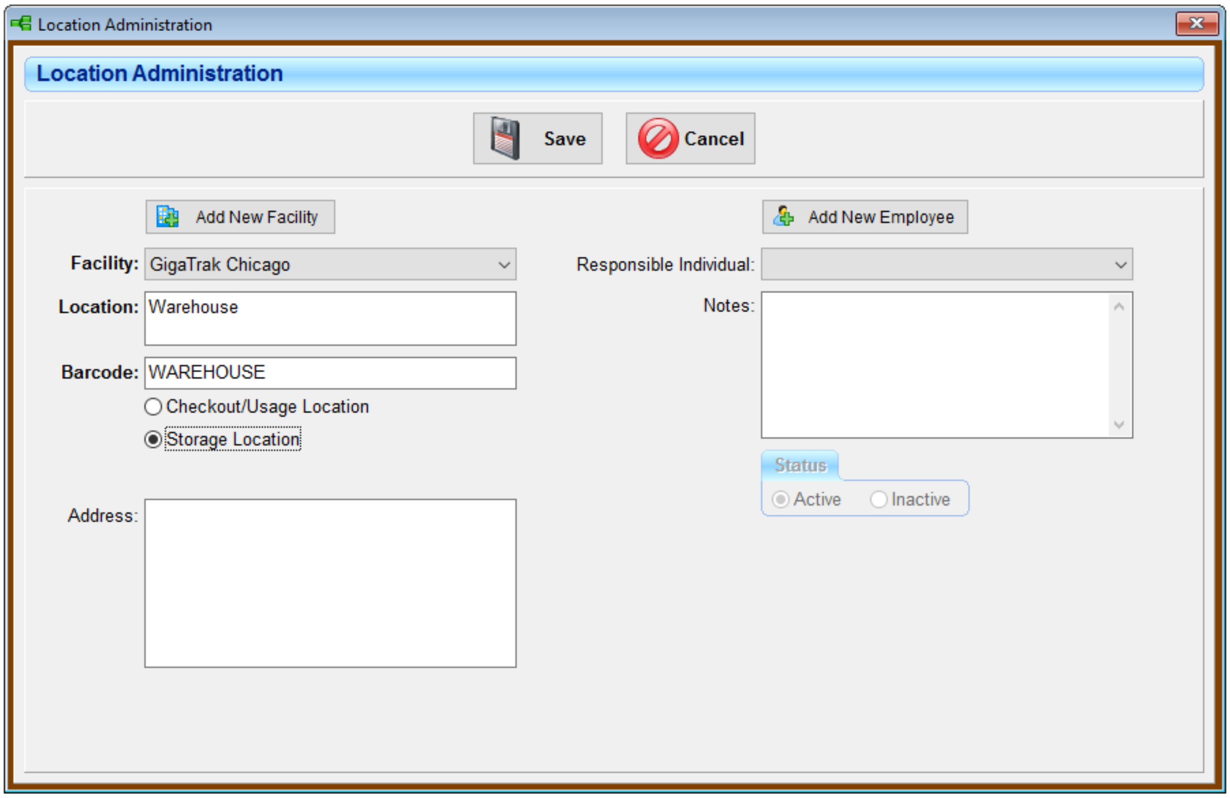


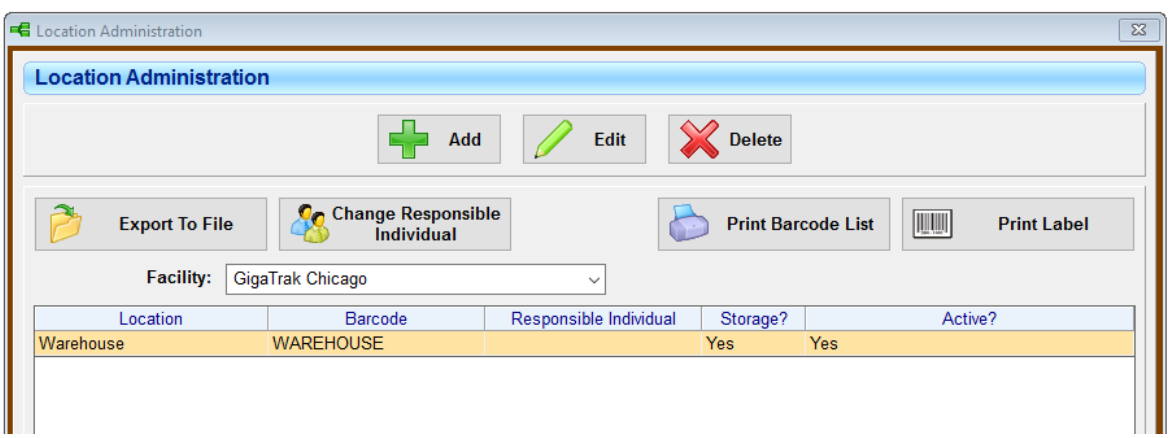


If you plan on checking assets out to jobsites or classrooms or anything other location, it is recommended that you create a fictitious facility called "Jobs" or "Classrooms". This is not a real building, but it will be used as a placeholder to keep all your jobs/classrooms separate in use with reporting.

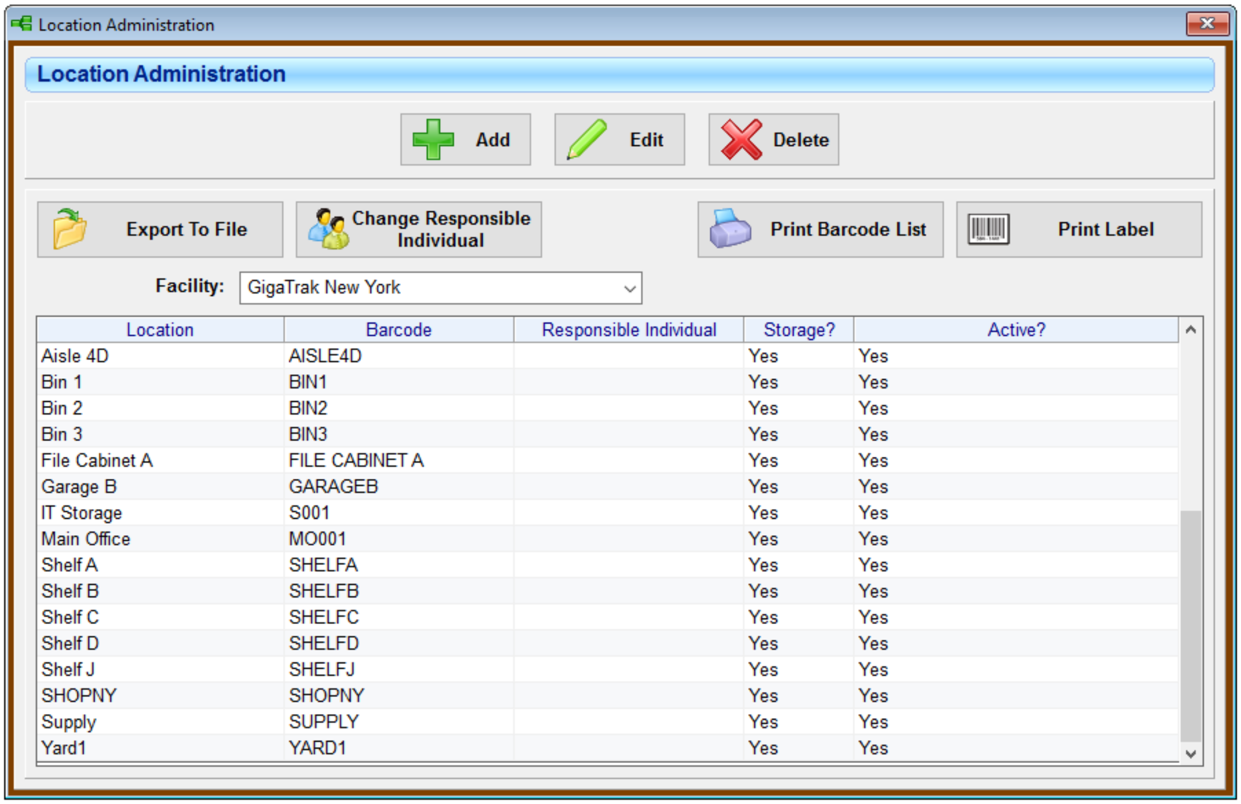


Next, we will create specific locations underneath each Facility. Go to Support→Location Administration. If you have entered multiple Facilities, use the drop-down menu to pick the Facility you wish to add a Location to. Click “Add”. Add in a Location name where your assets are stored. This can be a very general location like “Storage” or “Warehouse” or “Tool Crib”. The Location must also have a barcode. You can make up a barcode, put in a pre-printed barcode number or just put in the same thing as the Location name (example below). Mark this as a Storage Location. *Address, Responsible Individual, and Notes are optional.*





Or, you can choose to get more specific with your locations. For example, maybe you would like to know specifically where in the Warehouse an item is stored. In the example below, I have created many Storage Locations underneath the “GigaTrak New York Facility” such as aisles, bins, and shelves.

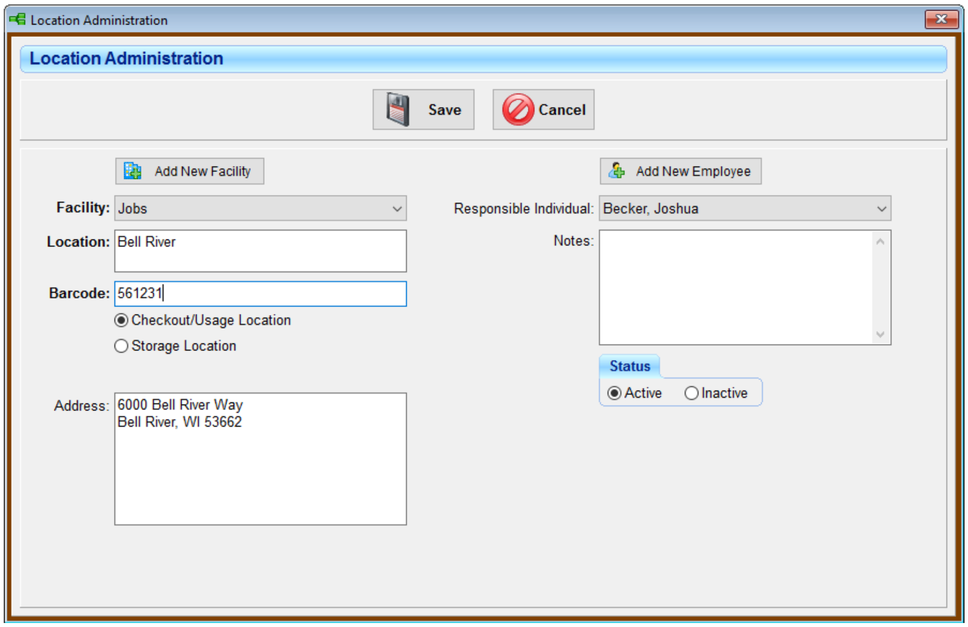


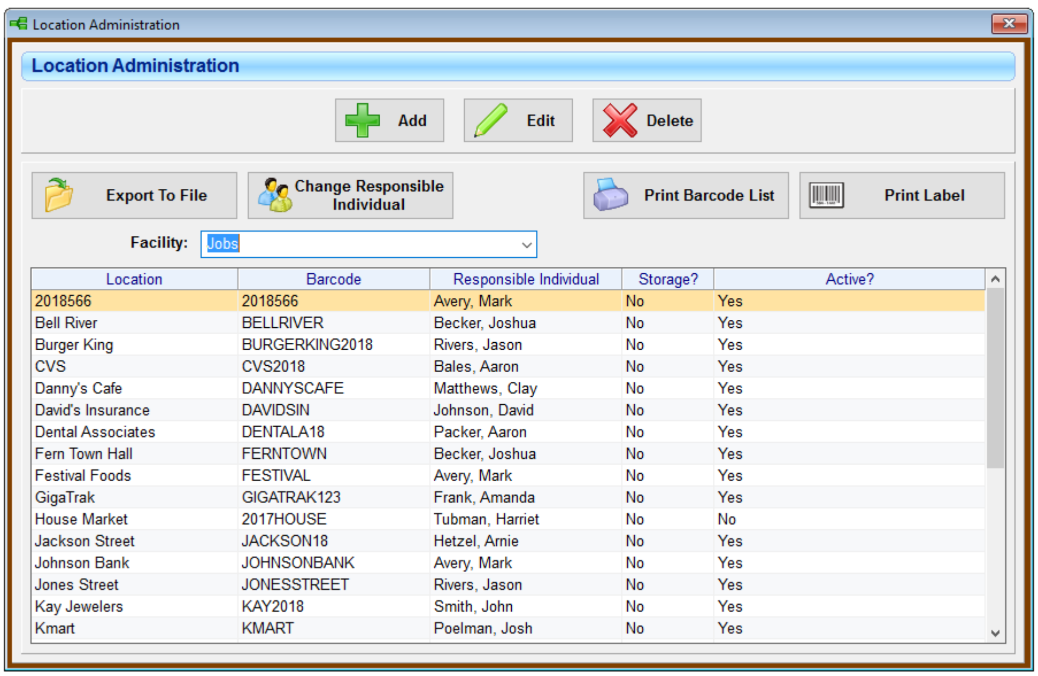
Location	Barcode	Responsible Individual	Storage?	Active?
Aisle 4D	AISLE4D		Yes	Yes
Bin 1	BIN1		Yes	Yes
Bin 2	BIN2		Yes	Yes
Bin 3	BIN3		Yes	Yes
File Cabinet A	FILE CABINET A		Yes	Yes
Garage B	GARAGEB		Yes	Yes
IT Storage	S001		Yes	Yes
Main Office	MO001		Yes	Yes
Shelf A	SHELFA		Yes	Yes
Shelf B	SHELFB		Yes	Yes
Shelf C	SHELFC		Yes	Yes
Shelf D	SHELFD		Yes	Yes
Shelf J	SHELFJ		Yes	Yes
SHOPNY	SHOPNY		Yes	Yes
Supply	SUPPLY		Yes	Yes
Yard1	YARD1		Yes	Yes

You can have any many Storage Locations as you wish. Each time you enter in a new tool in the database, you will be asked for its Storage Location.

If you plan on only checking out tools to employees, you are done with the Facilities/Locations. However, if you plan on checking out items to locations such as jobsites/classrooms etc., you will need to create checkout/usage locations now.

In Location Administration, using the Facility drop-down menu, pick the ‘Jobs’ Facility. Press “Add”. Put in your job name and barcode (if you use job numbers or codes, you should use that as the barcode). This is where an item is being used (not stored) and therefore will be a Checkout/Usage Location.





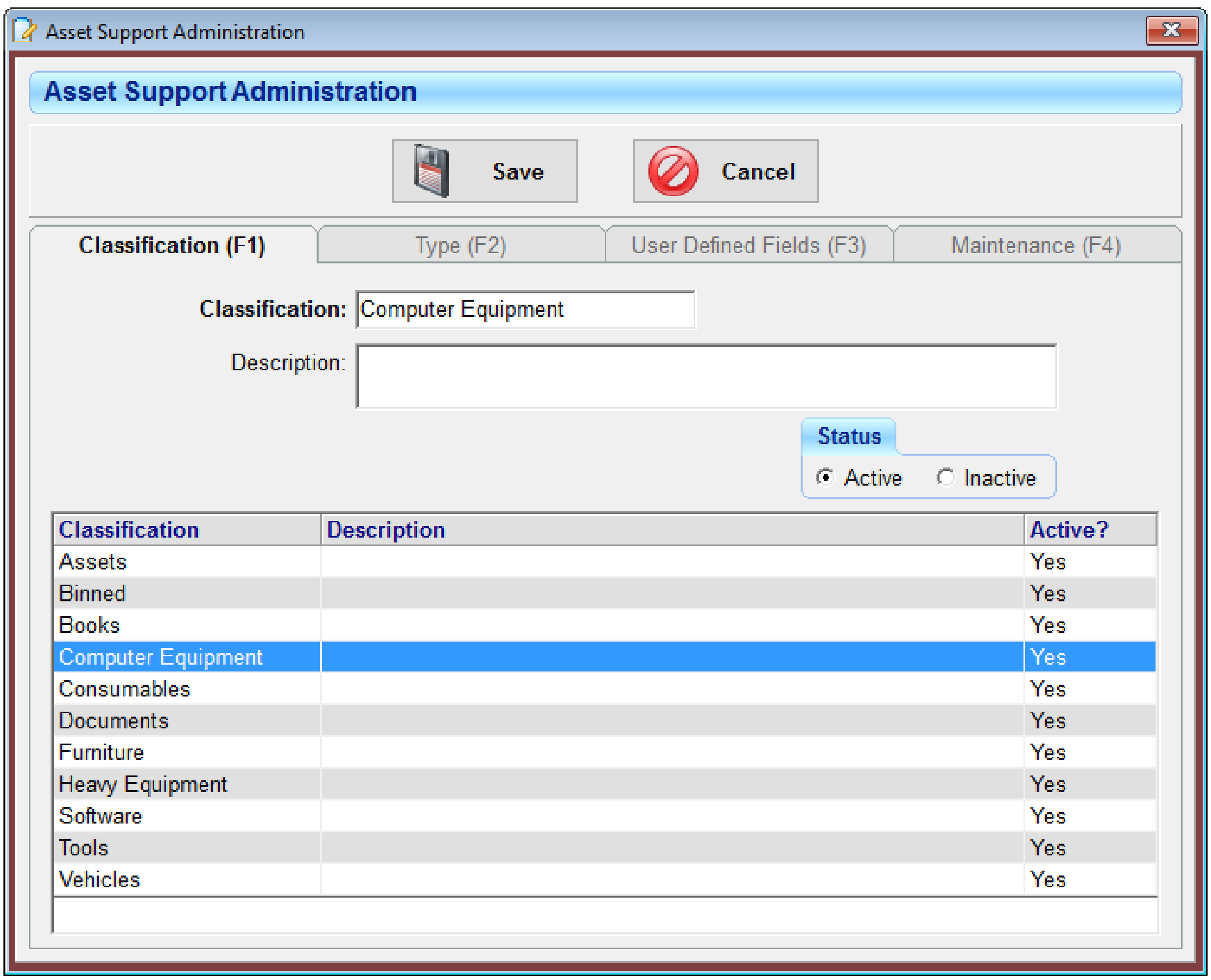
Please note this is only one example of checkout/usage locations. Every situation is different. You may be checking out to classrooms, or work areas, etc. Every Asset gets stored in a storage location (home location) and gets checked out to either an employee or checkout/usage location. When it gets checked back in, it goes back to its storage location.

CLASSIFICATIONS/TYPES

STEP 6

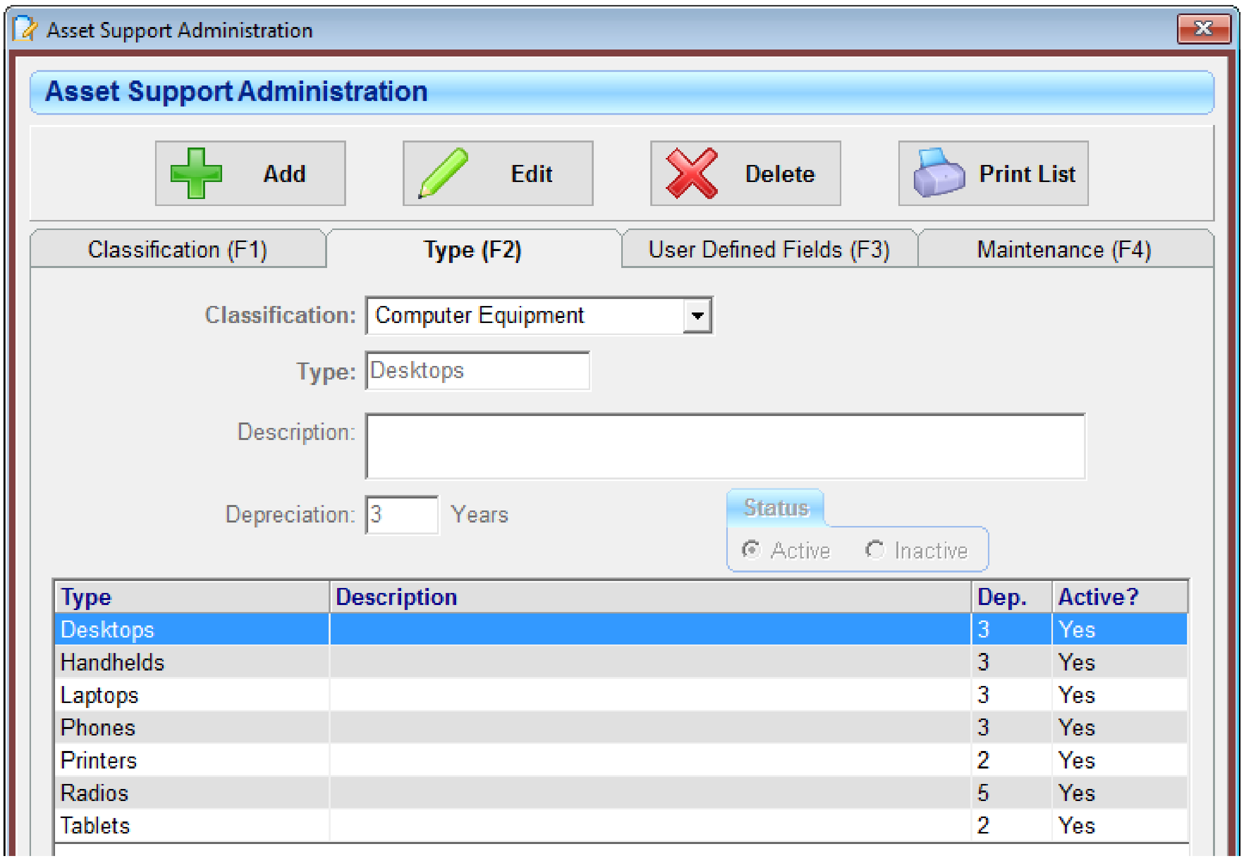
Next, you need to create Classifications and Types for your Assets. Classes and Types also have a Parent/Child relationship. Every single asset MUST have a Classification and Type. Classes and Types can also be referred to as Categories and Sub-Categories for your assets.

Go to Support→Asset Support Administration. The first tab is for creating your Classifications (Categories) that your assets will be put in to. Remember, you are NOT yet entering real assets in to the system yet; just creating Categories and Sub-Categories that your assets will get put in to. Just like Facilities and Locations, you can choose to get very general or very specific with your structuring. Press "Add" to add in a new Classification. *Descriptions are optional.* Below, I have a number of different Classifications. This example focuses on "Computer Equipment",



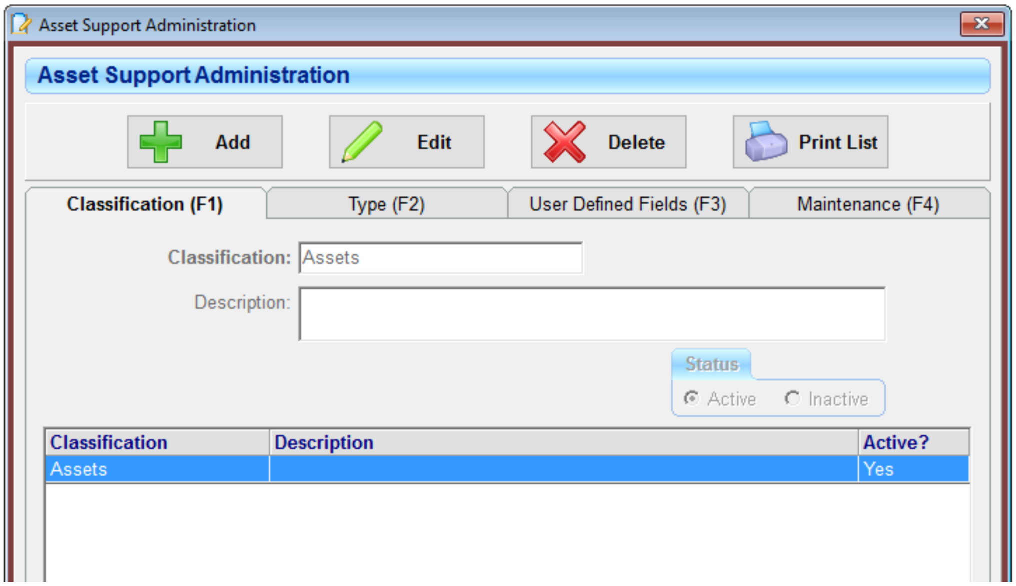
Press "Save".

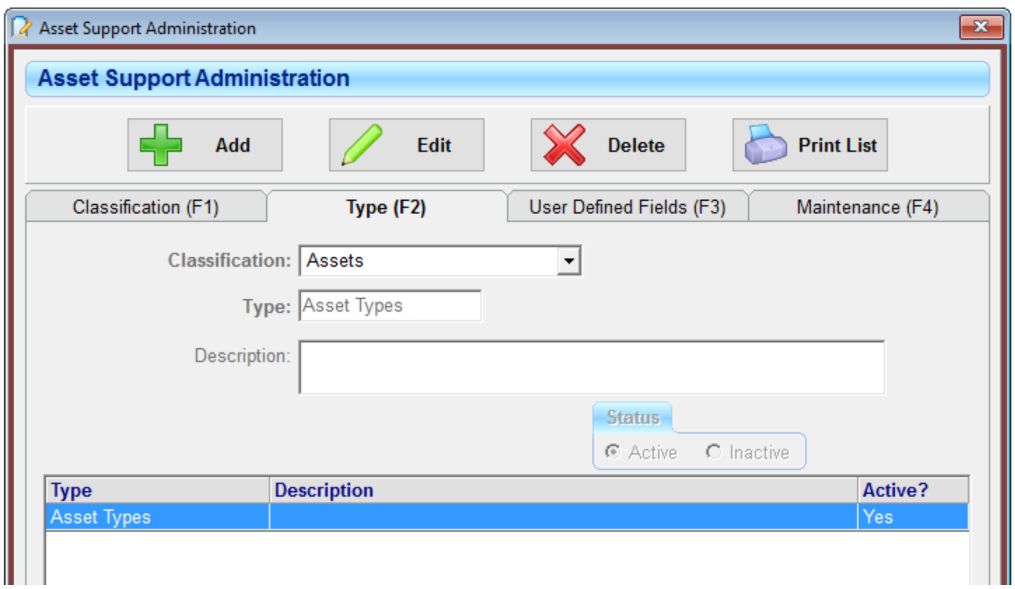
Next, go to the F2 (Type) tab to add in a sub-category within “Computer Equipment”. Below, I show a number of different ‘Types’ under ‘Computer Equipment’.



Description and depreciation are optional.

Another example of Classifications and Types is going very general. In the below example, I only have one Classification and one Type.





Every customer has a different structure for their Classifications and Types. It is up to your company to decide on how specific or general you get with these. Remember, you are NOT adding in real assets yet. Just creating Categories and Sub-Categories for your assets to be put in to. These Classifications and Types will be important filters for narrowing down your assets when you are looking for something specific. It is recommended that you discuss this structure internally as a group and graph them out on a piece of paper before adding them in to the system.

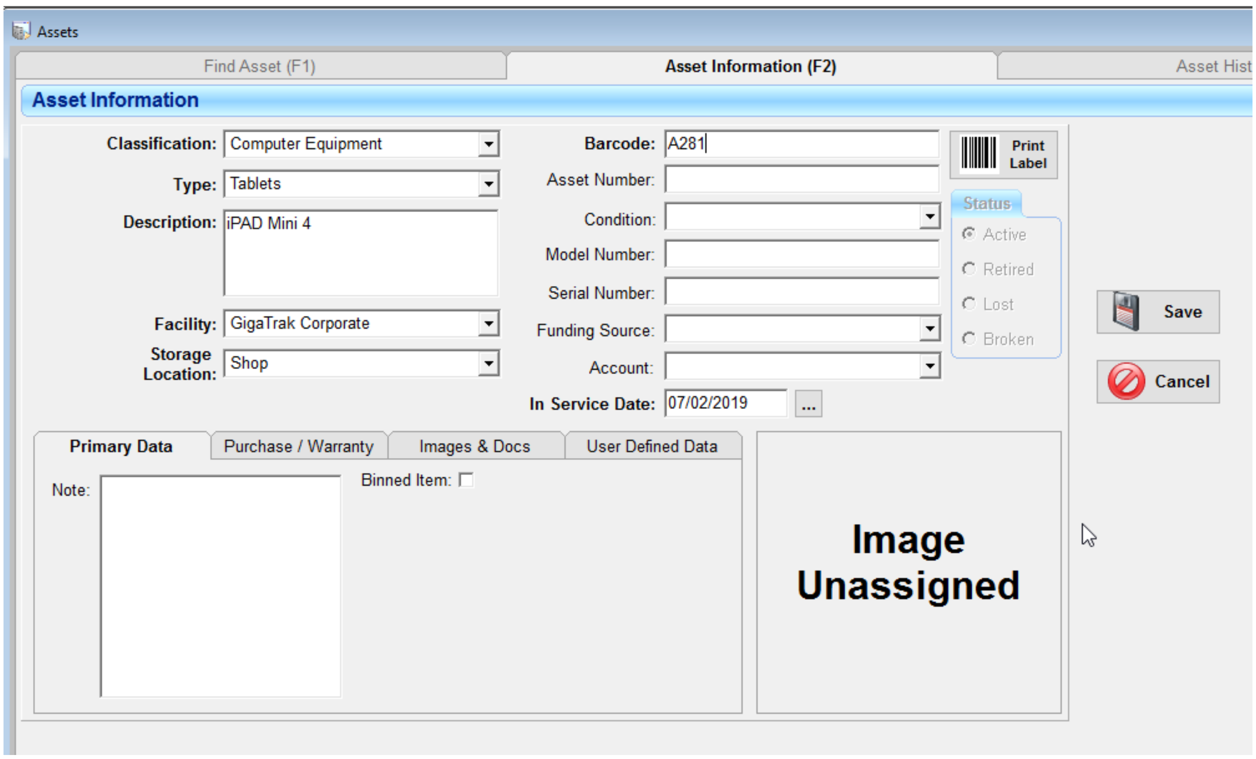
You have now finished doing the bare minimum setup and are ready to add in new Tools.

ADD NEW TOOL

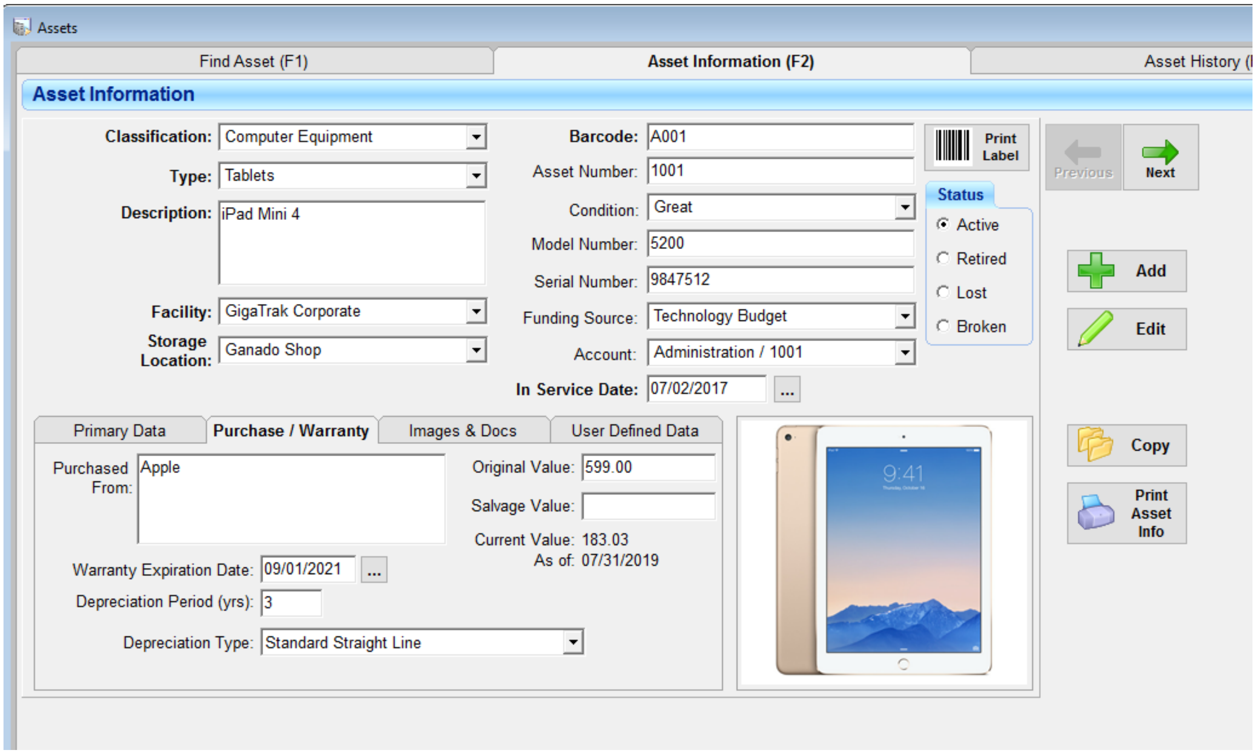
STEP 7

Click on the Assets icon and go to the F2 tab (Asset Information). Press “Add”. Use the drop-down menus to pick the Class, Type, Facility, and Storage Location for the Asset. You will also need to enter in an asset description and barcode. All other information is optional. Press Save. Continue this process for all assets. For similar assets, you can use the “Copy” function to copy and existing asset and simply changing the barcode and serial number (as this should be unique to every asset).

Example of an added Asset with the bare minimum information,



Example of an added Asset with all information,

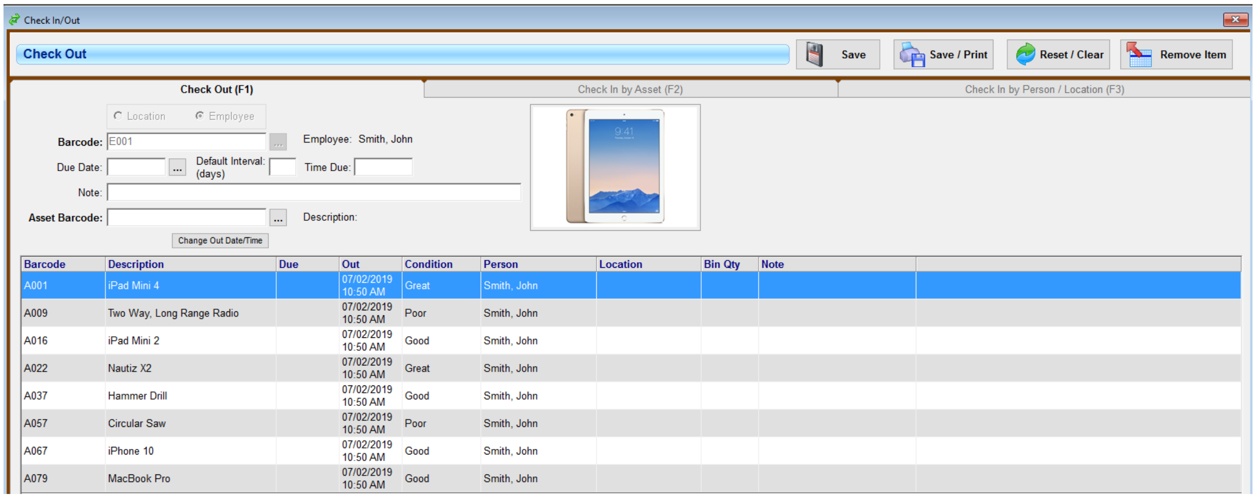


Remember only bolded fields are required.

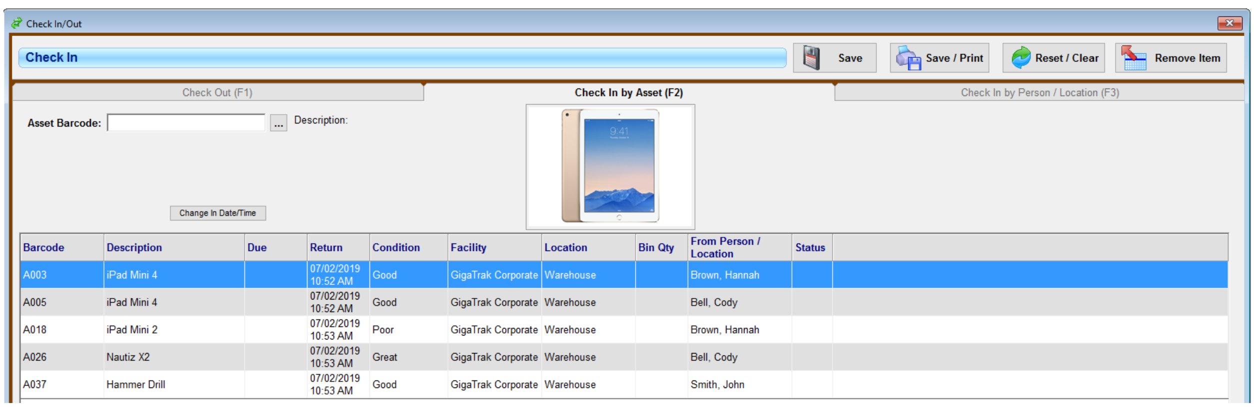
CHECK ASSETS IN/OUT

STEP 8

To move Assets from their home Storage Location to a person OR a checkout/usage location, you will perform a checkout. Go to the Check In/Out icon. The first tab is for checking Assets out. Using a corded or Bluetooth USB Scanner, you will first scan the Employee or Location barcode you would like to check an Asset out to. If you do not have a scanner, you can also enter the barcode manually with your keyboard. Next, scan or enter the barcode of the asset(s) you would like to checkout. Finally, press “Save” or “Save/Print”.



To Check Assets back in to their Home Storage Location, go to the F2 tab labeled “Check In by Asset”. Scan or enter the barcode of the asset(s) you would like to check back in. Press “Save” or “Save/Print”.



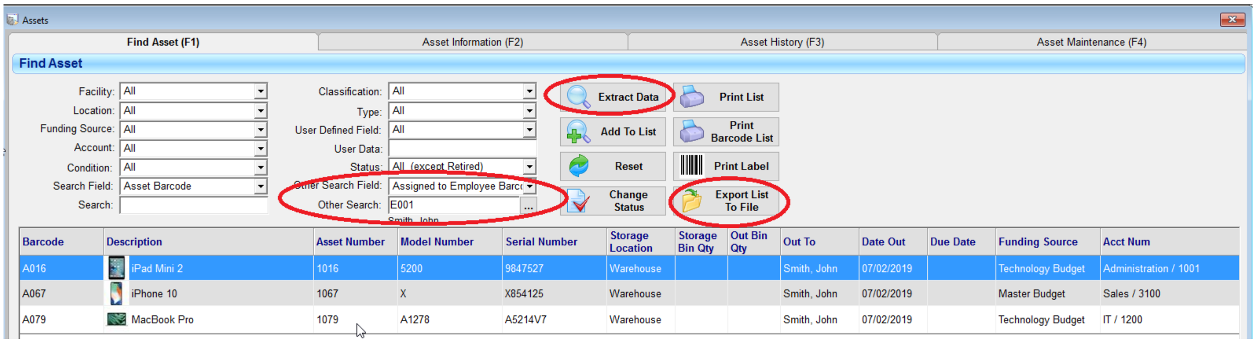
REPORTS

STEP 9

There are over 40 canned reports in the system that can be run at any time. The most important reports are usually the reports that have “Asset Assignment” in the title. Asset Assignment by Employee and Asset Assignment by Location are the most popular reports depending on if you are checking out to Employees or Locations. This will only show Assets checked out at that exact moment.

To see what Assets are in Storage and available for checkout, look for the last report on the list titled “Unassigned Assets by Storage Location”.

These reports are PDF only. However, you can get the exact same report information from the F1 tab (Find Asset) of the Assets icon by filtering down the information. Use the “Other Search Field” to look at Assets Assigned to a specific Employee or Location and Extract the data. Anything that is left in the grid below can then be exported to a TXT file if needed. (TXT files can then be put in to Excel for easier formatting)



For more information on the mobile application, please look to our Client Center for videos and documentation on usage.

For additional questions not covered in this guide, please contact training@gigatrak.com or support@gigatrak.com or call us at 262-657-5500.