TOOL 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). If you purchased or are testing out a Cloud-Hosted system, please follow the directions you were given to download the RDP (Remote Desktop) Link and proceed to Step 4.

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

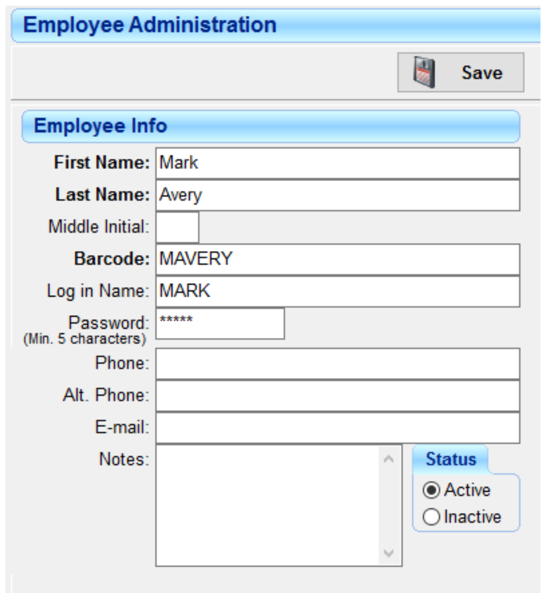
Password: ADMINUSER

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.

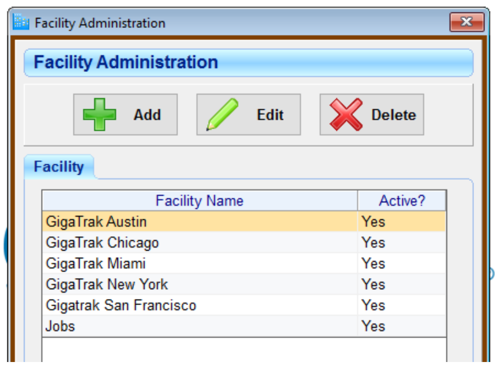


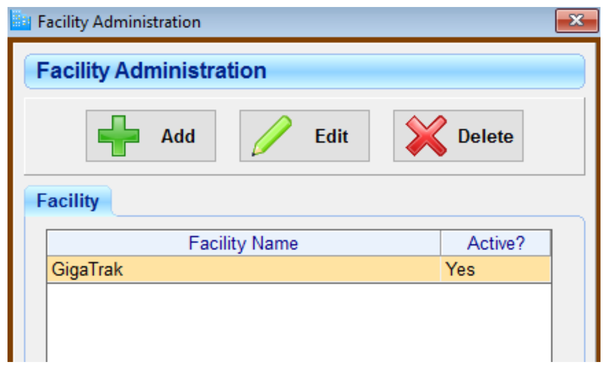
If the employee will be logging in to the system and performing transactions (on the PC or mobile app), they will need to be given a login name and password and have their access levels set on the right-hand side. If the employee will not be logging in but you would like to check items out to them, only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

FACILITIES/LOCATIONS

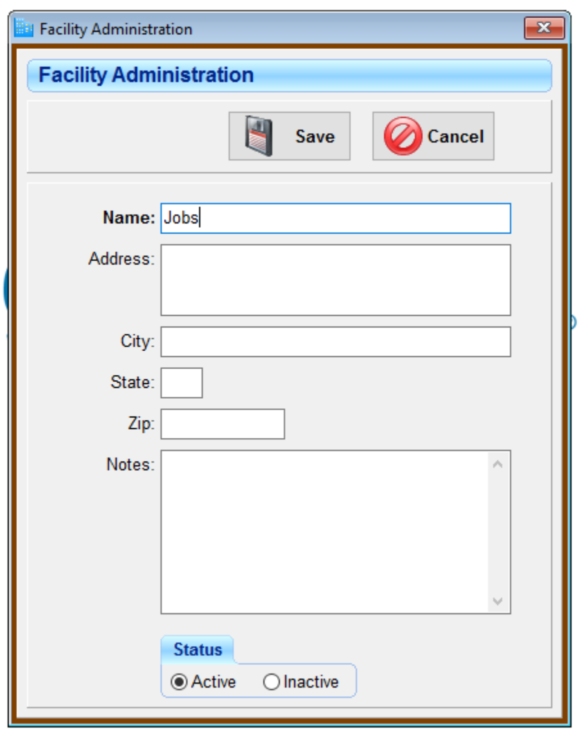
STEP 5

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 tool 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).

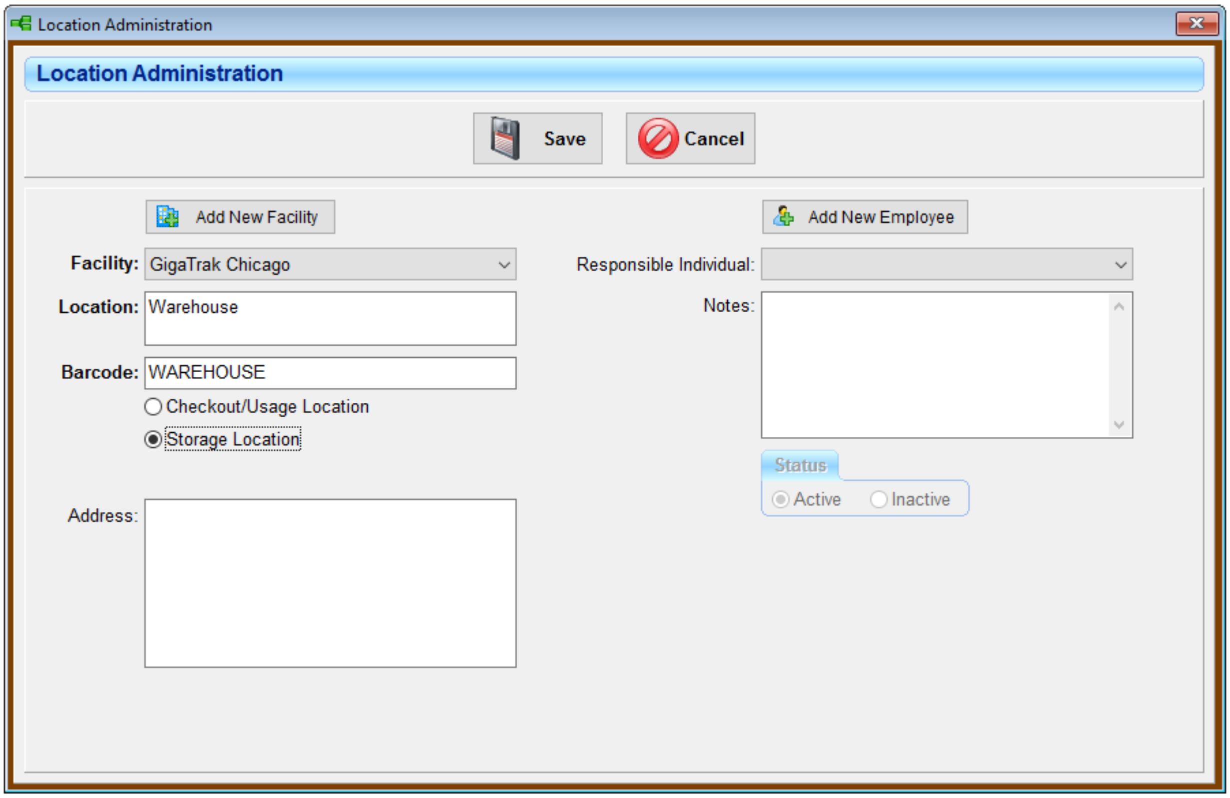


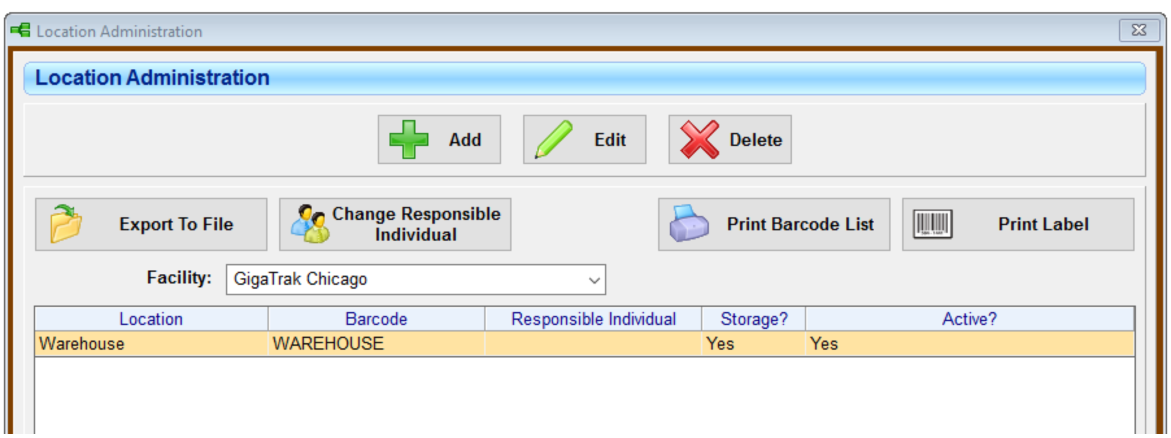


If you plan on checking assets/tools out to jobsites, it is recommended that you create a fictitious facility called "Jobs" or "Jobsites". This is not a real building, but it will be used as a placeholder to keep all your jobs separate in use with reporting.

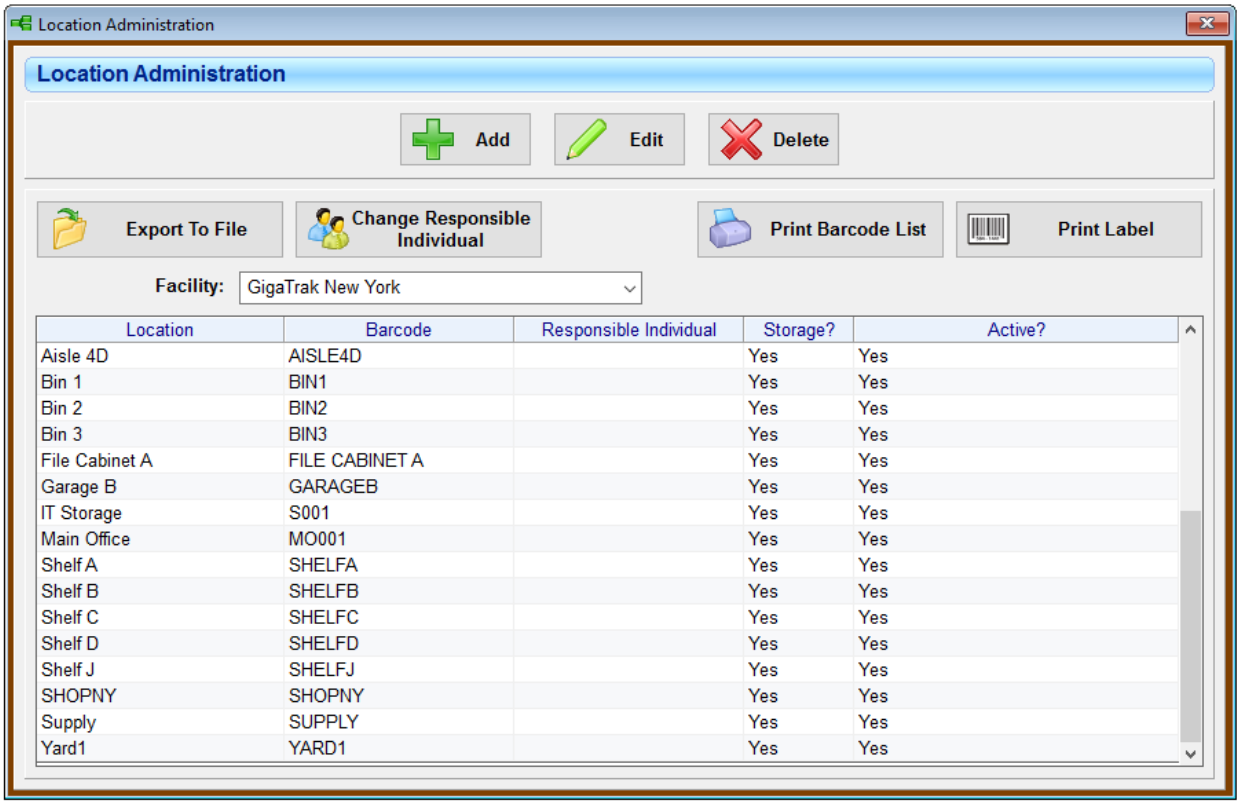


Next, we will create specific locations underneath each Facility. Go to Support→Location Administration. If you have entered multiple Facilities, use the drop-down menu to pick the Facility you wish to add a Location to. Click “Add”. Add in a Location name where your tools are stored. This can be a very 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.*





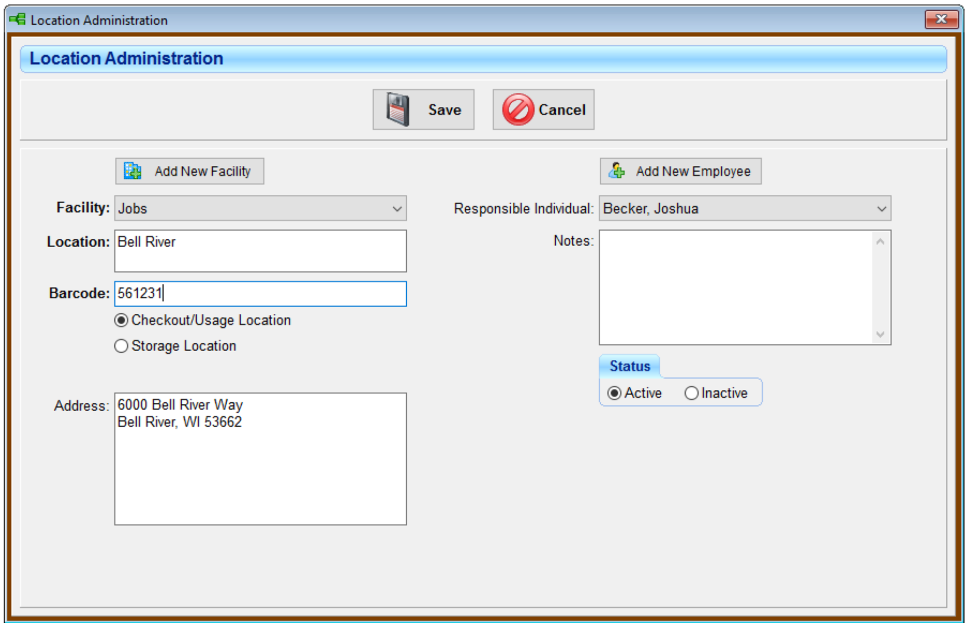
Or, you can choose to get more specific with your locations. For example, maybe you would like to know specifically where in the Warehouse an item is stored. In the example below, I have created many Storage Locations underneath the “GigaTrak New York Facility” such as aisles, bins, and shelves.

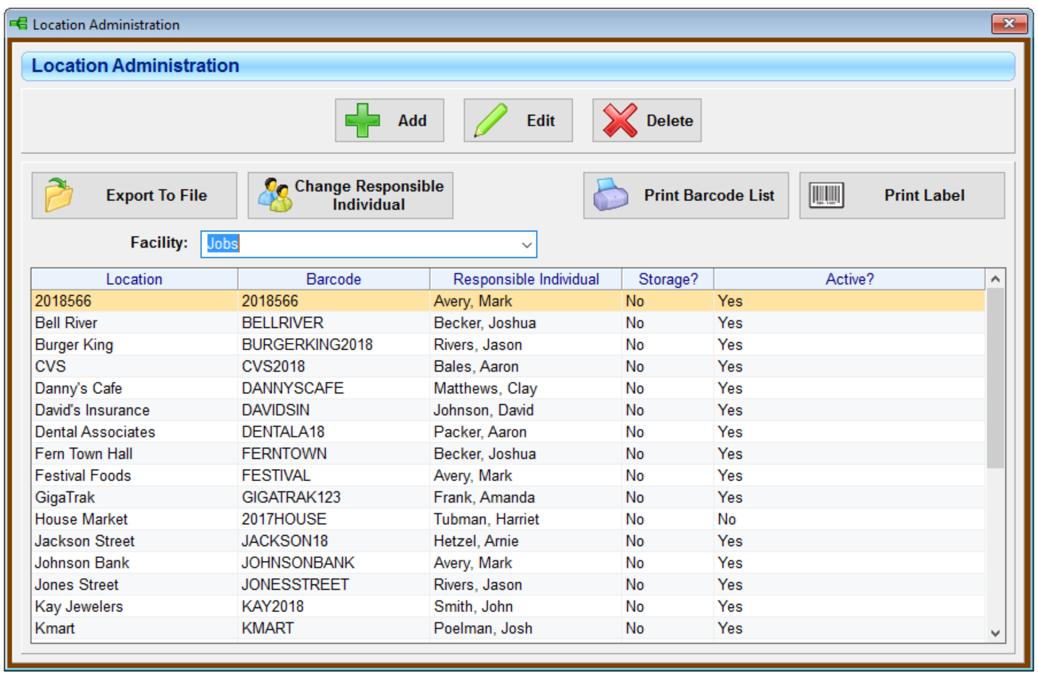


You can have any many Storage Locations as you wish. Each time you enter in a new tool in the database, you will be asked for its Storage Location.

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, 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.





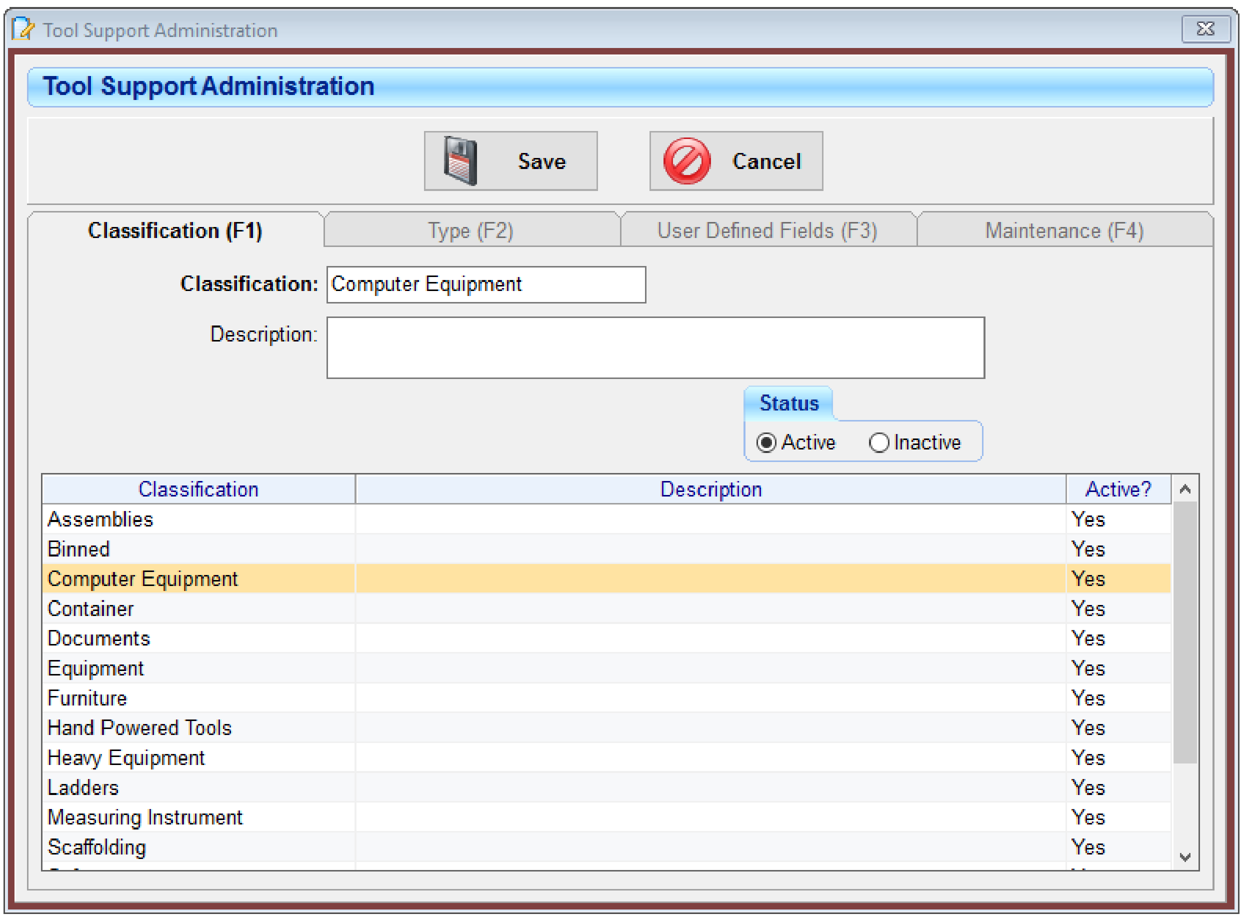
Please note this is only one example of checkout/usage locations. Every situation is different. You may be checking out to classrooms, or work areas, etc. Also, this quick start guide does NOT cover Transfer Locations as they are seldomly used. If you are moving items from one person to another or one location to another, it is considered a checkout to checkout; not a transfer. Please contact training@gigatrak.com to see is transfer is applicable in your situation.

CLASSIFICATIONS/TYPES

STEP 6

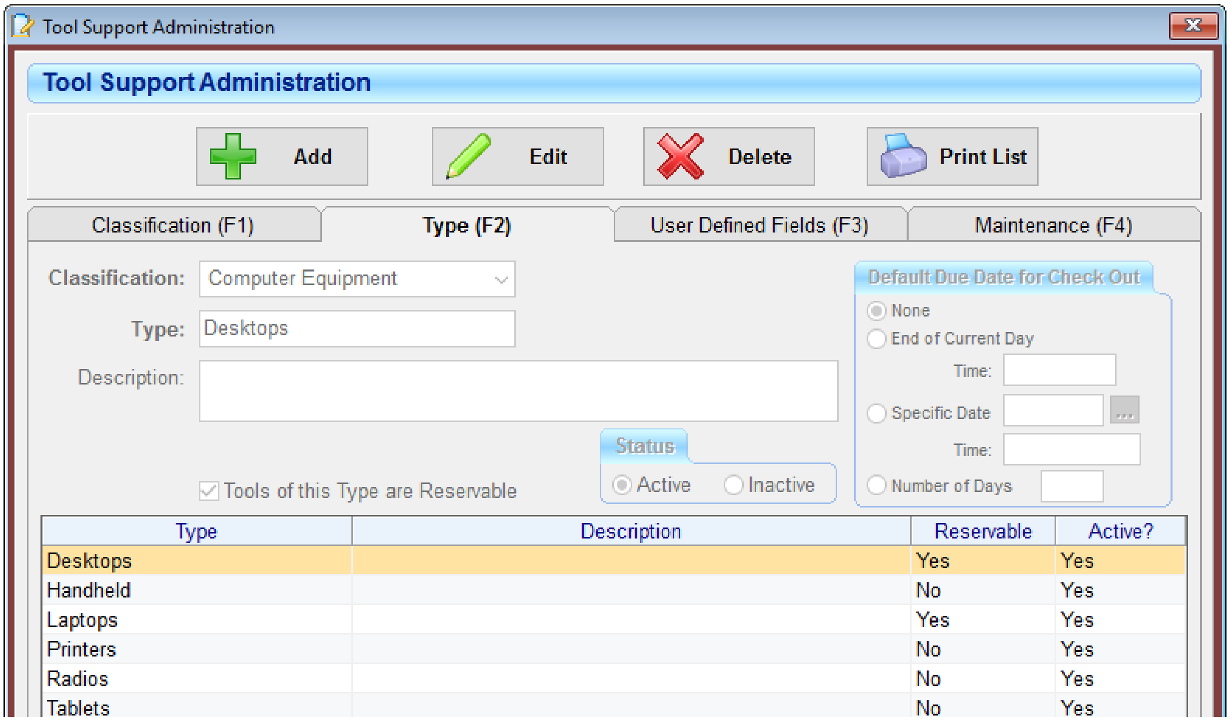
Next, you need to create Classifications and Types for your tools. Classes and Types also have a Parent/Child relationship. Every single tool MUST have a Classification and Type. Classes and Types can also be referred to as Categories and Sub-Categories for your tools.

Go to Support→Tool Support Administration. The first tab is for creating your Classifications (Categories) that your tools will be put in to. Remember, you are NOT yet entering real tools in to the system yet; just creating Categories and Sub-Categories that your tools 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",



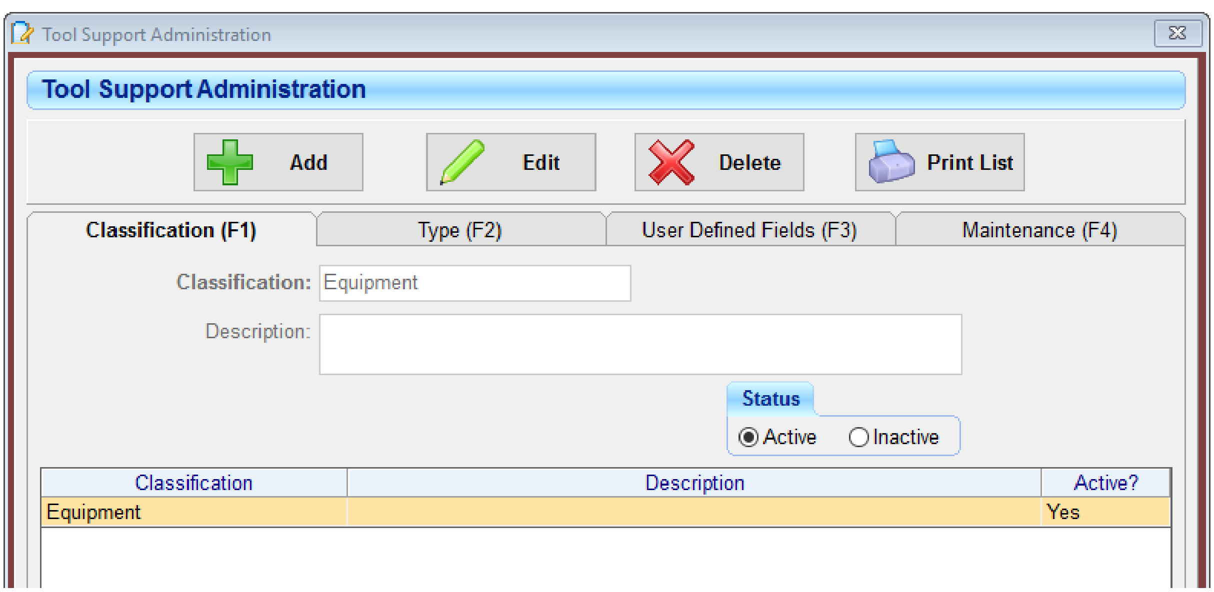
Press "Save".

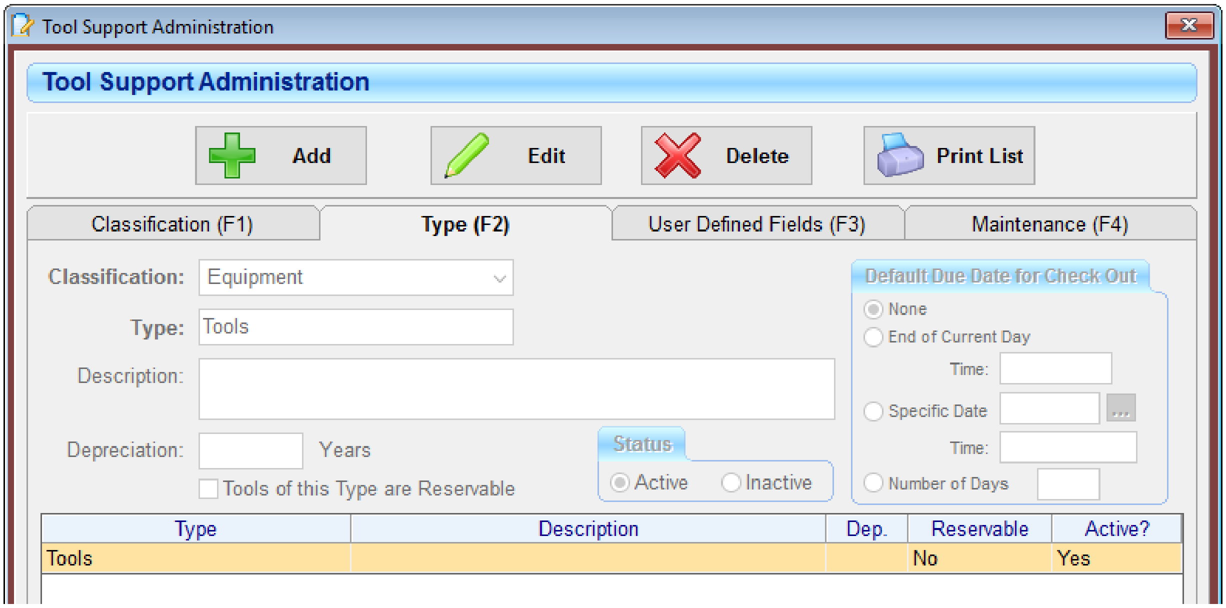
Next, go to the F2 (Type) tab to add in a sub-category within "Computer Equipment". Below, I show a number of different 'Types' under 'Computer Equipment'.



Description, depreciation, and default due dates are all 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 tools yet. Just creating Categories and Sub-Categories for your tools to be put in to. These Classifications and Types will be important filters for narrowing down your tools 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.

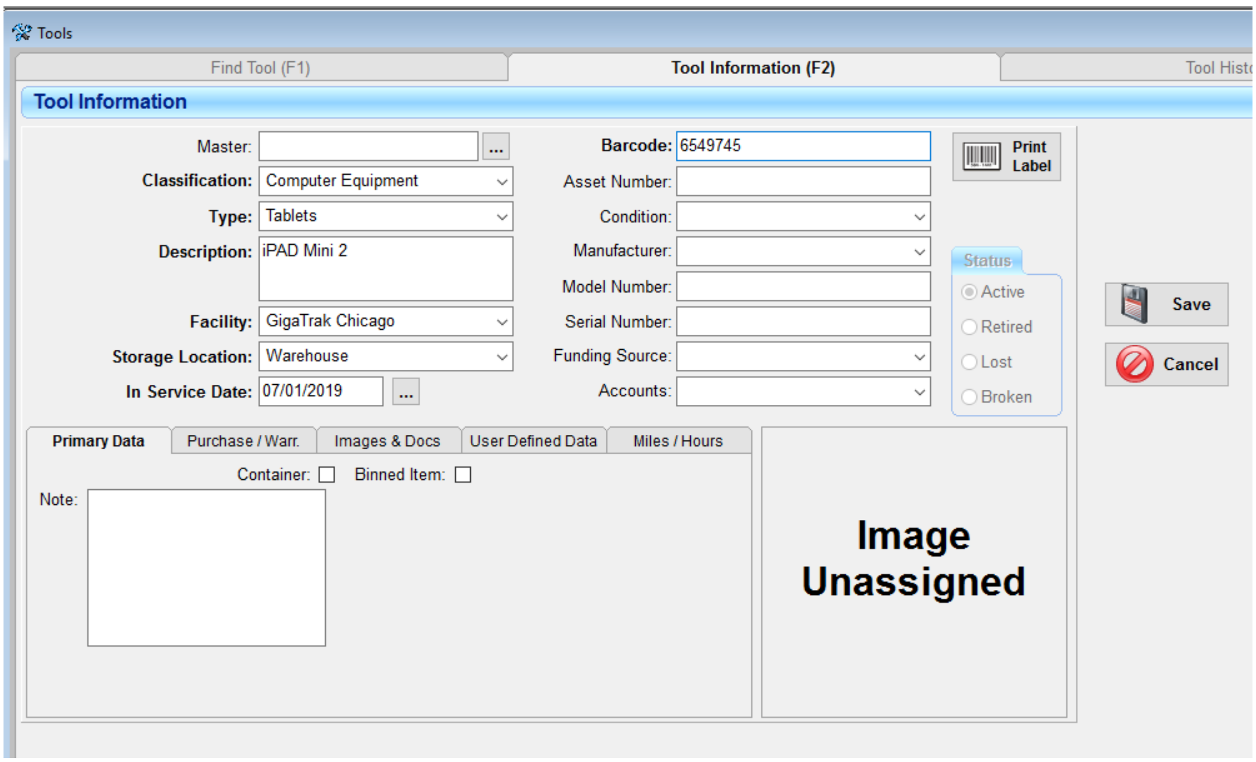
You have now finished doing the bare minimum setup and are ready to add in new Tools.

ADD NEW TOOL

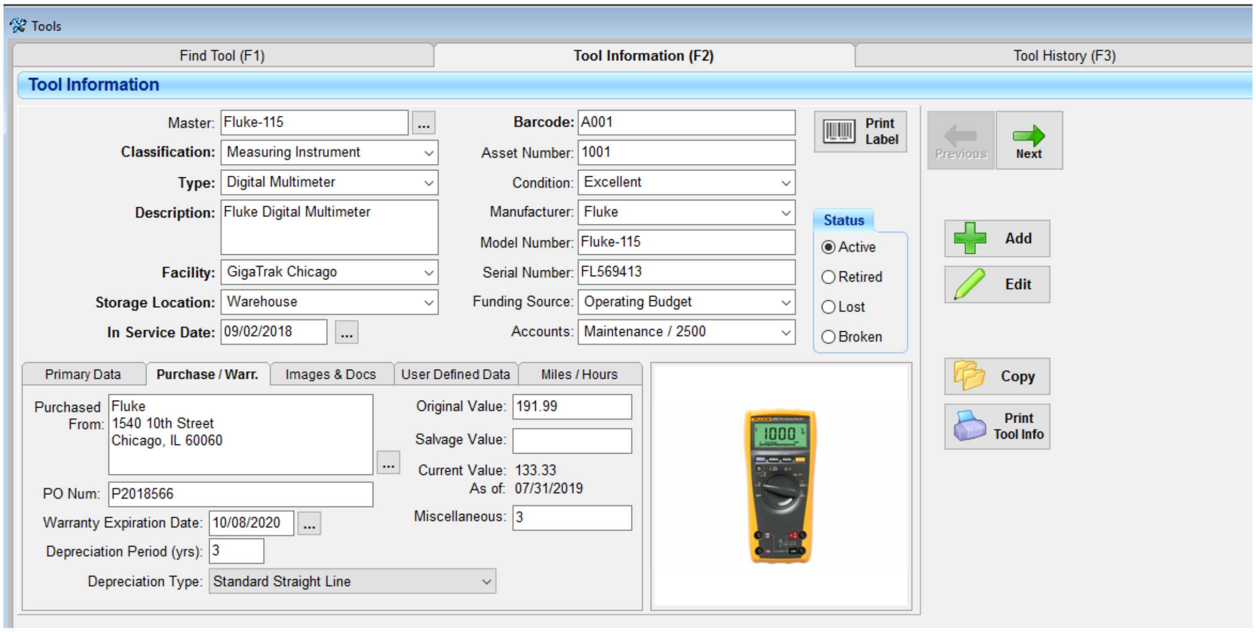
STEP 7

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

Example of an added Tool with the bare minimum information,



Example of an added Tool with all information,

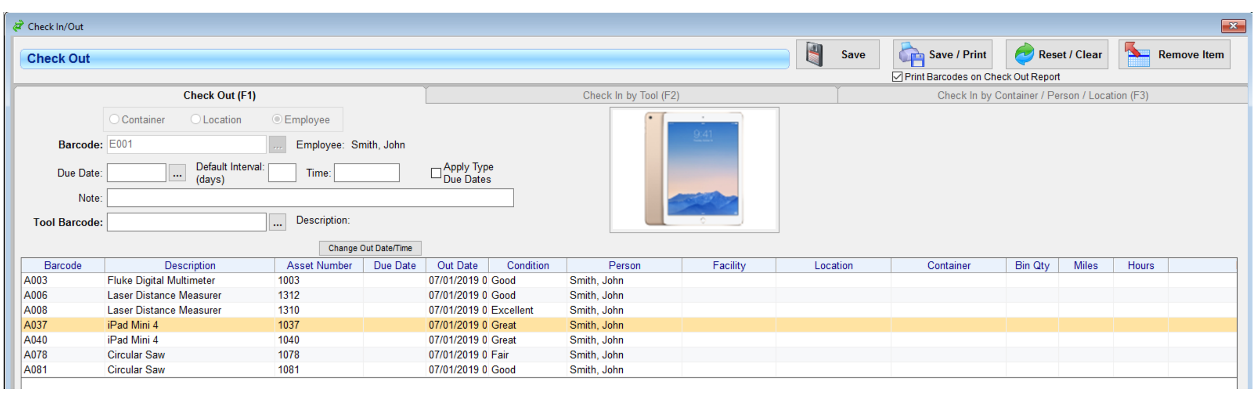


Remember only bolded fields are required.

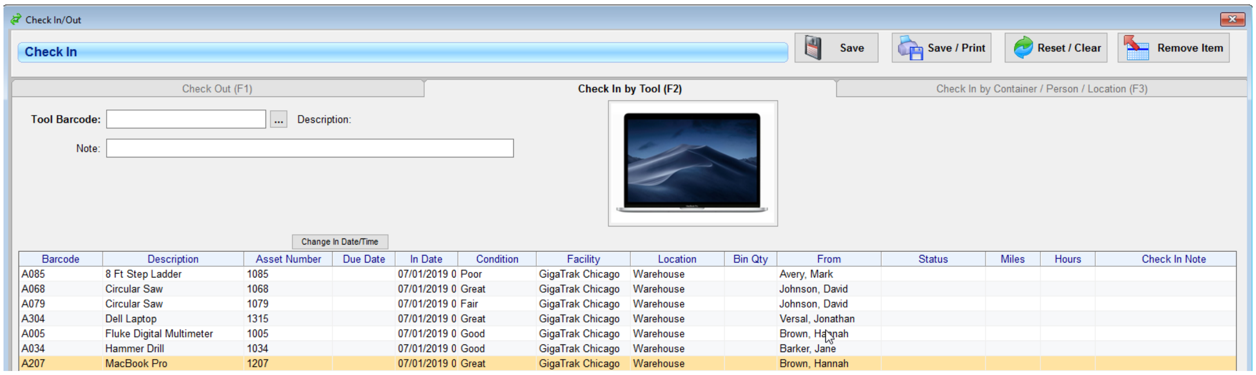
CHECK TOOLS IN/OUT

STEP 8

To move Tools 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 Tools out. Using a corded or Bluetooth USB Scanner, you will first scan the Employee or Location barcode you would like to check a tool 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 tool(s) you would like to checkout. Finally, press "Save" or "Save/Print".



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



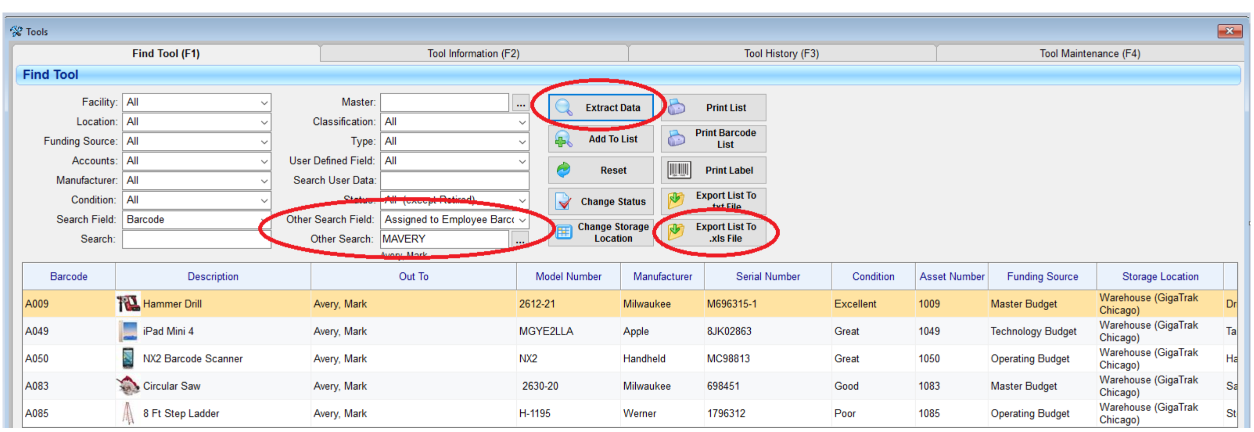
REPORTS

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 “Tool Assignment” in the title. Tool Assignment by Employee and Tool Assignment by Location are the most popular reports depending on if you are checking out to Employees or Location. This will only show Tools checked out at that exact moment.

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

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



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.