gigatrak®

TOOL TRACKING SYSTEM
MOBILE APP USER MANUAL

TTS MOBILE APP USER MANUAL

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REGISTRATION

If you are a self-hosted customer, you will first need to register and unlock your device licenses. a device license key should have been provided to you in your Order Acknowledgement email. Login as the Admin and go to File-Registration Forms-Device and register/unlock your licenses.

TTS Mobile Phone Application

First, go to your devices App Store or Play Store and download the GigaTrak TTS Mobile app. Once downloaded, you will see the following screen,

To quickly and easily setup your mobile application, it is recommend you use the QR code generator. This allows the user to scan a barcode to setup their app with predetermined settings. Skip to page 16 to see how to generate a QR code.

To manually setup your mobile application, follow in the instructions below.

CLOUD-HOSTED

GigaTrak hosts the TTS database for you in the cloud and you pay an annual subscription. Check the home page of the PC version of your system if you are unsure. If the logo has "Cloud" in it, then you will choose the cloud option.

gigatrak cloud

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ON-PREMISE OR SELF-HOSTED

Your organization hosts the database internally on a network/server/or single computer. You purchased the software outright at a one-time fee. Check the home page of the PC version of your system if you are unsure. If the logo does not say cloud, then you are self-hosted.

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Click on the correct button for your hosting option.

CONNECTION TYPE

Choose the connection type you wish to use and click on the checkmark box next to your choice.

<u>Live (best option for most)</u> – Requires internet connection at all times and updates the database in real-time. No syncing.

<u>Wireless Batch</u> – Stores transactions to your device when WIFI is not available. Sync transactions once you enter WIFI by pressing a Sync button.

<u>Wireless – Limited Batch</u> – Best for large databases and requires syncing over WIFI. Only allows check in/out functions.

<u>Kiosk</u> – Requires internet connection at all times and updates the database in real-time. No syncing. Only allows the logged in user to check out to themselves. Functions include, Check in/Check out and Identify. Best for an unmanned checkout station.

<u>Batch</u> – **Only for self-hosted systems.** Android only. Requires a manual sync (plug-in) with the PC each time to download transactions performed on the device.

****If you choose Manual Batch, skip to page 16 for batch setup. ****

SYSTEM SETTINGS

Choose which settings to have on.

<u>Enable in-app barcode scanner</u> – Allows users to use their device's camera to scan barcodes. If your device has a built-in scanner, this option should be turned off.

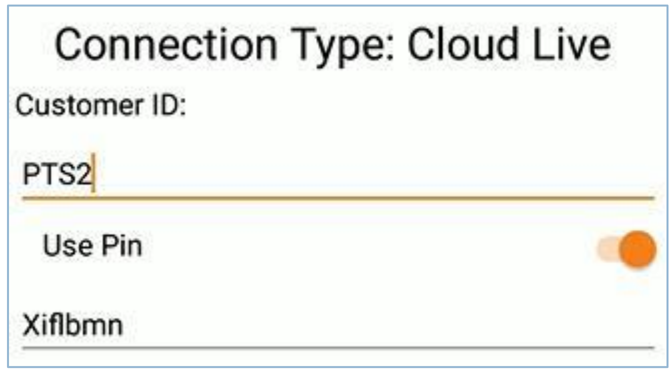
Download/View Tool Photos – Photos are available in the following connection types: Live and Wireless Batch. This allows users to upload default tool pictures and attachments to their database. Please note that when switching to Wireless Batch, having photos on can greatly increase sync times. It is recommended that photos be turned off in Wireless Batch to avoid lengthy syncs.

Press Continue.

CONNECTION TYPE

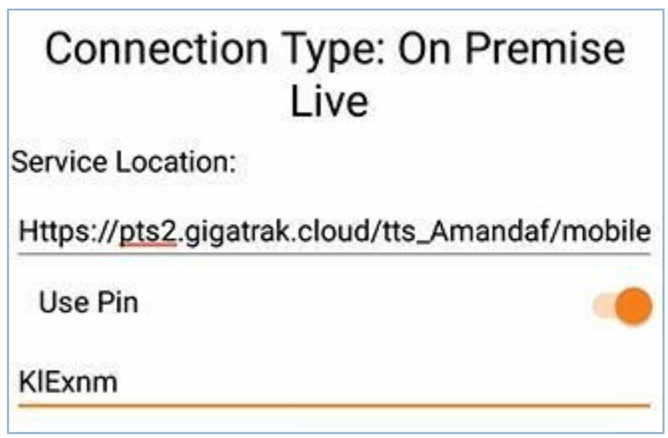
If you are a cloud customer, enter your customer ID number. This can be found in your Order Acknowledgement email.

If you are a self-hosted customer using the system in Live, Wireless Batch, Limited Wireless Batch or Kiosk mode, enter your web-service URL provided by your IT department.

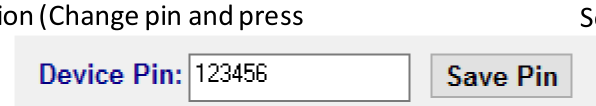


Cloud Example

Use pin – A pin number is provided to you in your Device Order Acknowledgement email. To immediately register and activate this device, turn on the toggle button for the pin and enter the one that was provided. If you choose to register a device without a pin, the license will need to be approved by the Admin on the PC version of the system under File-Device Administration. The random 6 digit pin can be changed on the PC version under File-Device Administration (Change pin and press “Save Pin”).



Self-Hosted Example



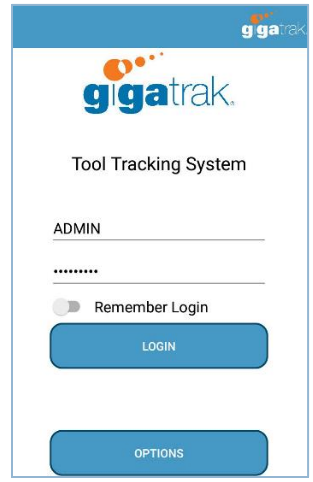
Device Name – Name your device. All device names must be unique. With the auto search on, the application will auto populate a unique name for you.

Press Submit.

Once Setup is Complete, press the “Complete Setup” button. Your device is now ready for use, and you can login. To setup a login profile, go to File-Employee Administration on the PC version of the system and create a profile with login credentials. These credentials will be used to login to both the PC version and the app.

TTS HANDHELD APPLICATION FUNCTIONS

The following describes basic operation of the Mobile Tool Tracking application.



LOGIN

When the handheld application is first started, a user login will be required. This will match the login that is used to access the desktop version of the application. These logins can be set up or changed in the Employee Administration of the desktop application. If the username and password matches an employee in the data file, the employee name will appear under the scan box, and buttons for the application functions will appear. Please note which functions that appear will depend on the type of sync and database downloaded if in batch mode and the permissions of the logged in employee.

The logged in user is tied to the records recorded by the handheld. If a different employee uses the handheld, he/she should login before recording records. To change the current user, select “Log Out” and enter in a different employee’s log in information.

Remember Login – Toggle this button on for the mobile application to remember your Username. Password cannot be remembered.

Permission Requirements for Each Function:

<u>Check In/Out:</u> The current user must have at least Simple Check In/Out Rights.

<u>Identify Tool:</u> The app must be in Live or Full Database mode and the current user must have at least View Tool Rights.

<u>Check Out Cart:</u> The app must be in Live or Full Database mode and the current user must have Edit Check Out/In Rights.

<u>Audit:</u> The app must be in Live or Full Database mode and the current user must have Simple Check Out/In Rights.

<u>Add New Tool:</u> The app must be in Live or Full Database mode and the current user must have Tool Edit Rights.

<u>Reservations:</u> The app must be in Live or Full Database mode and the current user must have at least View Reservation Rights to view current reservations in the system and Edit Reservation Rights if they wish to create a new reservation.

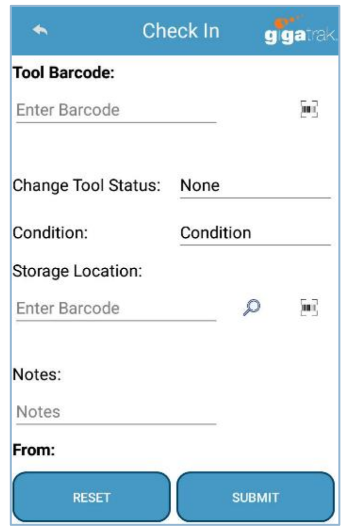
<u>Maintenance:</u> The app must be in Live or Full Database mode, the current user must have Edit Maintenance Administration Rights and “Show Maintenance on Handheld” must be turned on under the Setup Options on the PC. *(Only available on Pro and Contractor Editions)*

Add Tool Photo: The app must be in Live or Full Database mode with photos turned on and the current user must have Edit Tools Rights.

Find Tools: The app must be in Live or Full Database mode and the current user must have at least View Tool Rights.

Error Log: This will appear only after a failed sync in the Limited Database or Wireless Batch mode

CHECK IN (FULL)



The full Check In function is used to return tools from an employee/location/container back to a storage location.

The user can change the Tool Status or Condition from a drop-down list at the time of check in. The options are No (change), Lost, or Broken for the Tool Status Change.

First, scan or enter the tool barcode being returned. If you are using your devices camera to do the scanning, click on the scan icon, . This will bring up your devices camera to take a picture of a barcode. You do not have to press any buttons once the camera is pulled up. Once the barcode is recognized, the mobile app will return back to the screen with the inputted barcode in the field you were scanning. To scan with a built-in scanner, first place your cursor in the field you would like to scan. Then use the built-in scanner of your device to scan into that field. This is usually done by pressing the side buttons of the device. If you have a pistol grip attachment, you will pull the trigger of the attachment to enter the barcode into the respected field. If the barcode matches a record in the data file, the appropriate tool name will be displayed under the scan box as well as the current storage location. If the tool is being returned to this location, press the Submit button. If it is being returned to a different storage location, scan or enter the barcode of the new storage location. Furthermore, you can click on the magnifying glass to look-up a storage location and choose one from a list.

Notes on the check-in transaction must be input before submitting. Status and condition of tool can be changed after a tool is scanned but before pressing the submit on the transaction.

If the tool is not a binned item, the check in record is saved. If the tool is a non-consumable binned item, the Qty box will appear with a default quantity of one. You must enter the barcode of the employee/location returning the binned items in the “From:” field. Enter the appropriate quantity and press the “Submit” key to save the check in record.

If the tool is set up for Miles and/or Hours in the host database, the Miles and/or Hours boxes will appear, with the current readings filled in. Enter the appropriate values and press the Submit button to save the check in record.

Continue to scan the tool barcodes that will be checked in from the employee/location/container.

The Reset button will clear data from the screen without saving it. It will not reset data that has already been saved.

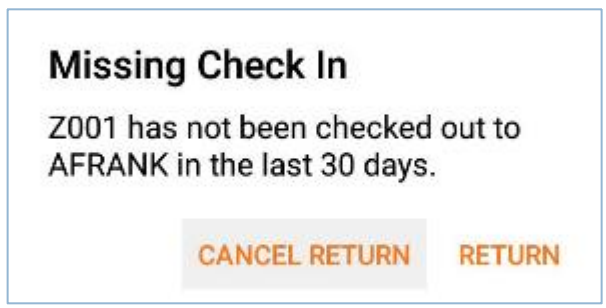
If you are using Limited Database mode, the Qty box will always be available as well as the Mile and Hours if maintenance is turned on for handhelds in the desktop setup options. The application will always save your information and will not report if there are any issues or conflicts with the check in until sync is pressed on the handheld. Any issues or conflicts will be reported in the Error Log.

CHECK IN (QUICK)

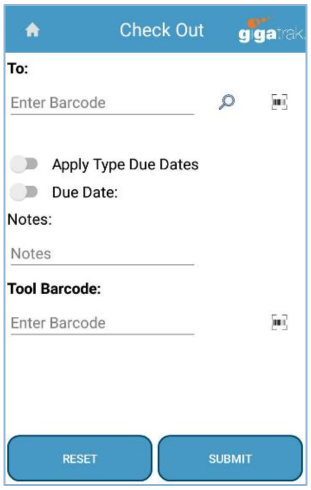
The quick Check In function is used to return tools from an employee/location/container back to a storage location without having to press submit. The quick Check-in does NOT allow the user to change status, condition or storage location for a tool. Once the tool is scanned for check-in, it will immediately be checked back into its home storage default location with the same status and condition it was previously in. The quick check-in can be used to scan a large amount of tools without having to press Submit after scanning each one therefore making the transaction faster.

RETURN CONSUMABLES

The ability to return consumables can be performed on the mobile application. First scan or enter the barcode of the consumable you wish to return. Then, scan/enter/look-up the "From" barcode of who/where the consumable is coming from. Last, enter the quantity being return. If no check-out transactions match the returning of a consumable item in the last 30 days, a pop-up will appear notifying you of a missing check-out to match the return. You can either Cancel the Return or Return anyways.



If there is a matching check-out transaction in the last 30 days, the transaction will submit successfully. The location/person/container will show they did not consume all of the items that were checked out.



CHECK OUT

The Check Out function is used to assign tools to employees/members, locations or containers.

Scan or enter the barcode of the person/location/container that is receiving the tools. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box. The magnifying glass can also be used to look up an employee/person/container from a list.

If a Due Date is desired, check the Due Date checkbox. No due date will be recorded if the checkbox is not checked. A popup calendar can be displayed by selecting the button displaying the date, or enter the number of days the employee will have the tool.

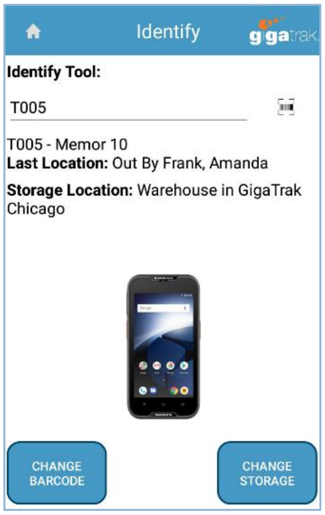
Scan or enter the tool barcode. If the barcode matches a record in the data file, the tool description will be displayed under the scan box. If the tool is not a binned item, the item will be checked out the moment you scan it. This allows the user to check out multiple tools to an individual/container/location without having to press "Submit" after each scan. Any notes for a specific tool check out must be entered before scanning the tool. If the tool is a binned item, the Qty box will appear, with a default quantity of one. Enter the appropriate quantity and press the Submit button to save the check out record.

Continue to scan the tool barcodes that will be assigned to the employee/location/container.

The Reset button will clear data from the screen without saving it. It will not reset data that has already been saved.

If you are using Limited Database mode, the Qty box will always be available. The application will always save your information and will not report if there are any issues or conflicts with the check out until sync is pressed on the device. Any issues or conflicts will be reported in the Error Log. (Note: In a Limited Database, the system does not check if employees, locations, or tools are true in the database).

IDENTIFY

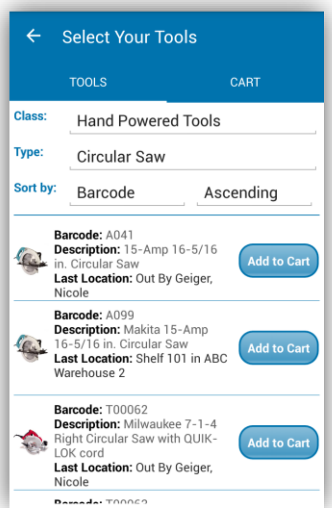


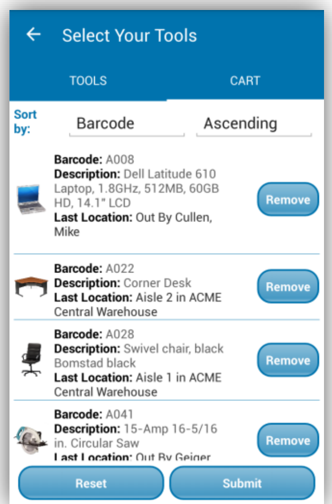
The Identify function is used to display the description, current location, storage location and photo (if applicable) of a tool when the barcode is scanned or entered. Please note the photo will only appear if Download/View Photos is set to Yes on the Options page.

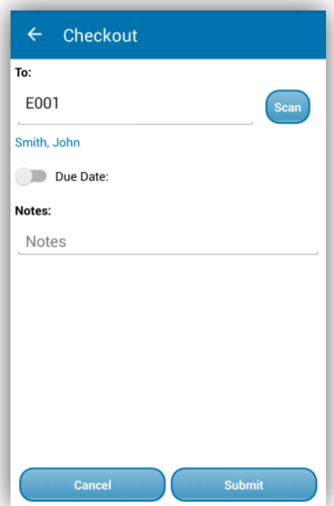
A tools home storage location can also be changed in the Identify function. Scan or enter the tool and press "Change Storage Location". A pop-up screen will appear where you can scan or enter the new storage location barcode. The magnifying glass can also be used to look-up a storage location and choose one from a list. Upon pressing Submit, the tool will have a new home storage location.

A tools barcode can also be changed in the Identify screen. If a tools barcode needs replacing, press the "Change Barcode" option. Scan or enter the new tool barcode and press Submit Change. The tool will now be known by the new barcode. All history transactions are saved on the tool even if a barcode is changed. A history record that a barcode has been changed will also list with the date/time and person that changed it.

CART CHECK-OUT





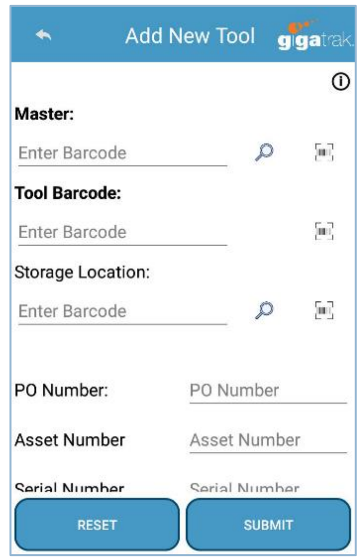


The Cart can be used to check out multiple items to a single employee, location, or container. To find a Tool, first start by sorting the Classification and Type of tool you are looking for. Clicking on each field will give you a menu to choose from. Once your Class and Type filters are set, the results will populate below. To add a Tool to your cart, press the "Add" button. When a tool has been added to your cart, the button will change to "Remove". The 'Sort By' field is used to sort the tools by several different options (barcode, model number, serial number, due date, etc.) making your tools easier to find in your list. In the Cart Tab (second tab), you can find the list of the tools yin your Cart. You can also scan tools in to your Cart on this tab. To remove a tool from the list, press "Remove". To change the quantity of a binned item, tap the "Edit/Remove" button to the right of the tool you wish to change the quantity of. If you would like to clear your cart, select the "Reset" button and your Check Out Cart will be cleared.

When you are finished adding items to your Cart, select the "Submit" button. You will then be brought to a summary page where you will be able to enter in the barcode of the employee, location or container you would like to check the items out to. Please note that adding in a Due Date or Note on this page will apply to all Tools being checked out during this transaction. Selecting "Submit" will submit the entire check out. Selecting "Cancel" will return you to the cart page with your items still in your cart.

The Email button will populate an email of the items in the Cart to send to another person's email. Emailing a Cart will not perform a checkout.

ADD NEW TOOL



A new Tool can be added from the mobile application if you already have Master or Catalog items (Tool Templates) entered on the PC version of the system.

Basic – Adding a tool in under the "Basic" option will allow you to enter Basic information on a tool to quickly add it to the system. Requirements on this page are Master, Tool Barcode, In-service Date (auto-populates) and Current Location. All other fields are optional. A Catalog/Master/Template is required to enter a tool which essentially is a Template for a tool. You can scan or enter a Master number or click on the magnifying glass to choose from a list. Finish filling out any remaining fields and press Submit.

Advanced – Adding a tool in under the "Advanced" option will allow the user to enter additional supporting information on a tool such as Funding Source, Account, and Purchase and Warranty information.

With both Basic and Advanced, the user can double click on each title field to "lock it down". This is useful if you are adding in numerous tools of the same Catalog/Master. All fields can be locked except Tool Barcode (must be unique).

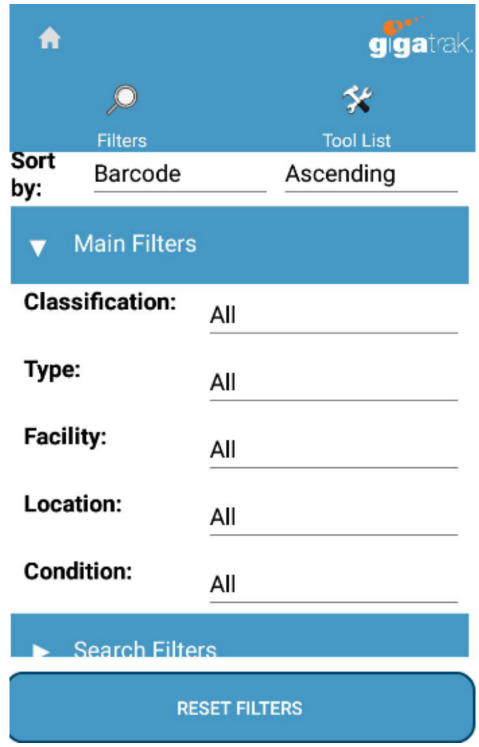
Finally, submit the new Tool. If on Live database mode, you will be able to immediately use the Tool for check-out. If on Batch mode, you will need to sync before using the Tool for any actions.

FIND TOOL

The find tool is the reporting function of the mobile app and consists of two tabs: Filters and Tool List. The top half of the Filters tab allows you to filter by Class, Type, Facility, Location and Condition which are the main filters. You can use any mixture of filters. Once you have chosen the filters you want, click on the "Tool List" tab to receive a list of tools that match the filters you have selected.

The "Sort by" at the top of the screen allows you to choose how the list is displayed on the "Tool List" tab. You can sort by Barcode, Serial Number, Model Number, Asset Number, Due Date, Out Date, Description or Binned Quantity. Furthermore, you can choose to have the list sorted in Ascending or Descending number.

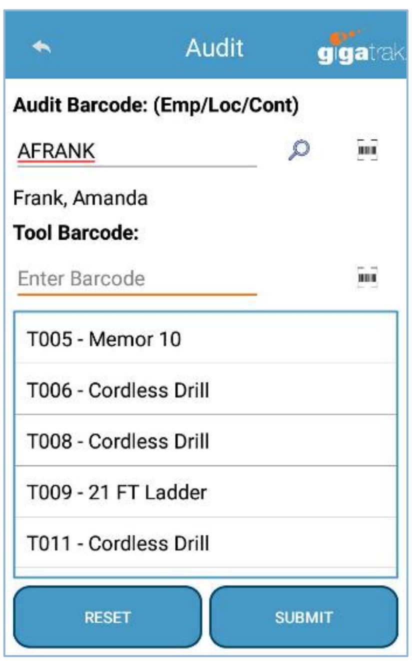
The bottom half of the screen contains "Other Search Filters" that can be expanded. The first Search field allows the user to choose what specific information they would like to search by. Choices are Barcode, Description, Asset Number, Model Number, Serial Number or Purchase Order field to search by. Once a choice is made enter the data you would like to test by in the "Search" field. Furthermore, you can scan into the Search field if needed. The "Other Search Field" enables the user to search by Binned Tools, Tools Checked Out or Tools Checked in. Once a choice is made, enter or scan a Master you would like to search by OR below that enter the Barcode you would like to search by.



Reset Filters will reset the entire screen to default filters.

On the second tab, "Tool List", will display tools that match the corresponding filter information from the first tab. The display will show the first 10 tools that match and the user can load more tools to the list with the "Load Next" button. Furthermore, clicking the "Expand" button on any tool will show complete Tool Information on a tool. Pro and Contractor edition also has a "View Location" button on this screen which allows the user to bring up a Google Map of the last location the tool was involved in a transaction. Please note the user must have Location Services enabled for the app for this feature. Dismiss returns the user to the Tool List screen.

AUDIT



Audit Tools - The Audit function is used to verify tools that have been checked out to an employee/location/container are in their correct location.

Scan the barcode of the employee/location/container that is being audited. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box, and a list of the tools that are currently assigned to that barcode will appear in the box below.

Note: Binned tools do not show, and will not be displayed.

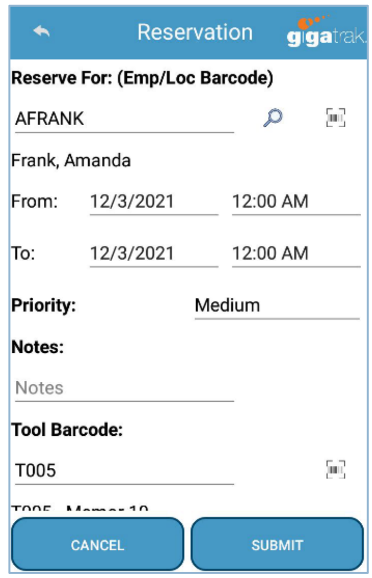
If the scanned barcode matches one of the barcodes in the list, that item will be removed from the list. Continue to scan the tool barcodes, including barcodes that do not appear in the list. When all tools have been scanned, there may be some items still on the list. Those items can be reconciled when the data is downloaded back to the host PC.

Bin Count – The bin count audit is used to Audit the home storage location of Binned Assets. First, scan or enter the barcode of the binned item you are auditing. Then, enter the quantity of the items you physically counted. If in live database mode, the bin count will immediately be updated with the new number.

The Cancel button will clear data from the screen. Tools that were audited will have been saved. (Note: Audits will still need to be committed on the Desktop Application in the “Audit” icon.)

RESERVATIONS

The Reservation function is used to view and create reservations.

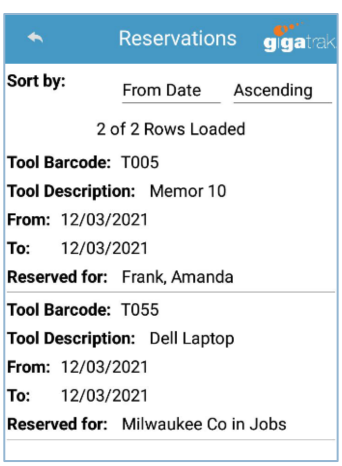


To create a new Reservation, Scan the barcode of the employee/location that the tool is being reserved for. If the barcode matches a record in the data file, the appropriate name will be displayed under the scan box.

The user can select their Priority level from a drop-down list when the reservation is placed. The options are Low, Medium and High and correspond to the same priorities on the desktop program.

Select the From or To dates to change them. A popup calendar can be displayed by selecting the date fields.

Scan the tool barcode. If the barcode matches a record in the data file, the tool description will be displayed under the scan box. Please note, binned items cannot be reserved. Once your reservation is ready to be submitted, press the Submit button to save the reservation.

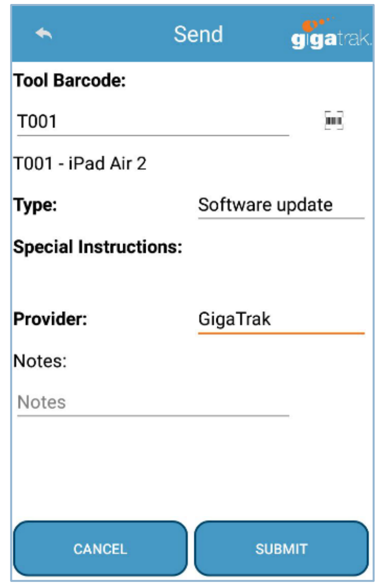


The ‘Reset’ button will clear data from the screen without saving it. It will not reset data that has already been saved.

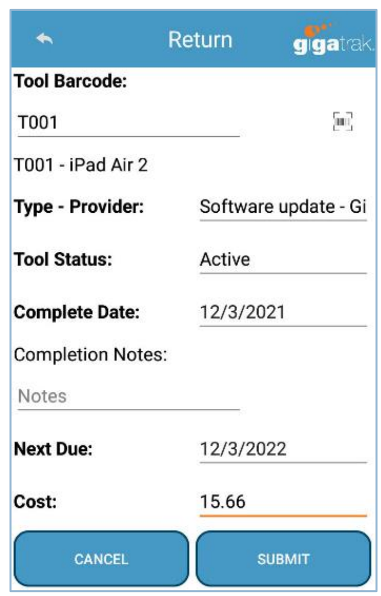
The View Reservation page will show all current reservations in the system. Each reservation in the list can be selected. By selecting the reservation, you will be able to view more information about that reservation. Current Reservations can be sorted by date or barcode. The ability to Edit a current reservation can also be done by Viewing a current reservation, clicking on it, and then pressing the Edit option.

MAINTENANCE

The Maintenance Function (Only available in Pro and Contractor Editions) allows users to select a tool to Send to Maintenance, record a tool that has been Return(ed) From Maintenance or do a Quick Maintenance (send and return all in one).



Send to Maintenance - When sending a tool for maintenance, the user must scan or enter the tool barcode, select the repair type (repair types are set on the PC version of the system), pick a provider, and enter any notes (optional) they prefer. Any special instructions for that repair type will appear in the Special Instructions text box. These instructions will scroll left and right if they are too long to fit in the box. The record is then saved and the status is set to “Out for Maintenance” immediately in live mode or once the data is synced in batch mode. A tool that is Out for Maintenance cannot be involved in a checkout transaction



Return from Maintenance – Return an item from maintenance allows the user to scan in items previously sent for maintenance, record the maintenance results and the cost of the maintenance. This is then added to the Maintenance History for the specific tool. To Return a Tool from Maintenance, scan or enter the barcode, choose the Repair Type, enter any Completion Notes and/or Cost and hit “Submit”. (Note: The ‘Next Due’ date will default to that tools current scheduled maintenance interval. To change, simply select the date and pick the Next Due Date from the calendar).

Quick Maintenance – Quick Maintenance allows users to record an entire Maintenance transaction in one step. Instead of sending an item out and bringing it back later, the user can scan or enter a barcode of a tool, pick the Type, pick the provider, enter any cost or completion notes (optional) and Submit. The data will auto populate to today’s date but can be changed by the user.

ADD PHOTO/DOC

The Add Tool Photo function is used to take pictures of your tools with your device or select them from your device's gallery and send them to your database.

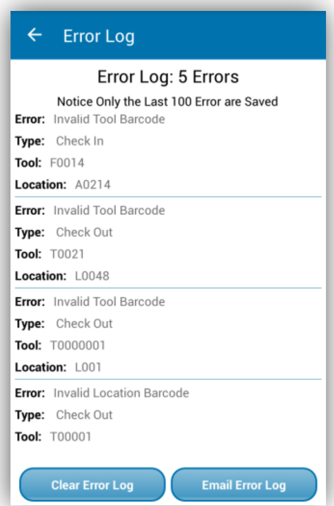
Add Default Photo – Every tool can have a single default photo that will appear. First, scan or enter the tool barcode. If the barcode matches a record in the data file, the tool description will be displayed under the scan box. Choose whether you are taking a new photo or picking from your device's gallery. If taking a new photo, the camera will appear and you can snap a picture of the tool. Once you are happy with the photo, click the checkmark icon and the app will return back to the screen with the photo showing. The Rotate button will allow you to rotate the photo so that it displays as you would like it to show in the program.

Once you have the picture you would like to use, select Submit to send the photo to your Tool Tracking database (live or on your next sync). If there is already a picture available for this tool, the device will ask if you would like to override that photo. Press "Reset" to clear the page.

Add Attachment – An unlimited number of attachments can be added to each tool. (User manuals, receipts, invoices, purchase orders, maintenance, etc.) These attachments can then be viewed on the PC version of the system under the Tool Information tab. To add an attachment through the app, first scan or enter the barcode of the Tool. If the barcode matches a record in the data file, the tool description will be displayed under the scan box. Choose whether you are taking a new photo or picking from your device's gallery. If taking a new photo, the camera will appear and you can snap a picture of the attachment. Once you are happy with the photo, click the checkmark icon and the app will return back to the screen with the photo showing. The Rotate button will allow you to rotate the photo so that it displays as you would like it to show in the program.

Once you have a picture of the attachment you would like to use, select Submit to send the photo to your Tool Tracking database (live or on your next sync). Press "Reset" to clear the page.

ERROR LOG (LIMITED DATABASE ONLY)



The Error Log will only appear after syncing with a Limited Database if the device was unable to send certain records. When using the Limited Database mode, the system does not check any of your information until you sync your data. If there are any records that the device was unable to sync, you will be notified, and the device will add those records into the Error Log. Here, in the Error Log you can clear or email the log. By selecting Email the log, the device will prompt you to select your email application. Once selected, the Error Log will be attached to your email in a Tab Delimited Text file. This file can be opened in a spreadsheet viewer program for more information about why the device was unable to sync the records in question and a summary of the Check Ins or Check Outs in question. The Error Log will store up to 100 errors, at which point the device will remove the oldest records to make room for the new errors.

SYNC (BATCH MODE ONLY)

After you have performed any number of transactions, it is important to sync your database. To do so, you must have internet connection available via Wifi or data. If internet is not available during the sync, the application will tell you that “Service is not available or is Unreachable”. Before syncing, you can also view a “Pending Log” of all transactions that need to be synced. This log can be Emailed or Cleared (which will erase all transactions and will cause you to resync your database). Once your transactions have been synced, they will Clear from the Pending Log. (Note that having Photos “On” may increase sync time). If internet connection is unavailable, you can continue to do transactions that will be ‘stored’ until a connection becomes available.

SUPPORT

GigaTrak provides telephone/email support for your Tool Tracking System during the span of your agreement. Our hours are 9 AM to 5 PM Central Standard Time, Monday-Friday. During this time, you are entitled to any updates or new releases issued by GigaTrak. Onsite support is available at additional cost. Please call 262-657-5500 extension 2 with any questions or support@gigatrak.com

To inquire or purchase more App user licenses, please contact our Sales Team at 262-657-5500 ext. 1 or sales@gigatrak.com