



TRAINING PREPARATION

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The following document outlines several suggestions and recommendations that allow for the most effective use of your training time. Please review and consider prior to your complimentary training.

DOWNLOAD OR LOGIN TO THE SOFTWARE

- It is recommended that your software be already installed if you purchased a self-hosted system. This could entail a single PC install, network install, or SQL install
 - If using the mobile app, this could also entail setting up a self-hosted web-service off your own intranet using IIS. All install steps are included in your Order Acknowledgement email.
- If you purchased a cloud-hosted system, follow the Order Acknowledgement steps for logging in and accessing the system.

SYSTEM ADMINISTRATION

- Review Existing System/Process
 - How does existing tracking work now?
 - Can you export data from existing system?
 - What will you be tracking? Decide which items will be tracked and which items will not be (if any)
- Note who will administer the system, which users will have access, and determine training requirements.
 - User Access Security Rights Options
 - Global (ability to download updates and modify Setup Options)
 - Administrative (add Edit access rights)
 - General User (specific access rights)
 - Non-PC Users, Handheld Users (Check In/Out access rights)
 - Initial training is two hours of admin setup and usage. Determine who will attend.
- Define how detailed you want to get with tracking. Model #, Serial #, Cost, Depreciation, Warranty, Custom Fields, etc.
- Consider what equipment will be assigned to People, Places, or Containers. A checkout can be to a person (employee), a location (ex. jobsite), or a container (job box).
- Where will your items be stored? Every asset or tool must have a home storage location. This could be something simple like a “warehouse” or somewhere more specific like “bin 1”.
- How will your items be categorized. Every item must have a category and sub-category assigned to it. This will be separate from the main description of the item. Who will decide on these categories?
- Who is responsible for data entry? Will they enter items via import, manually via the PC or via the mobile app?
- Use Default Username for Training
 - Username: admin
 - Password: adminuser