TOOL TRACKING SYSTEM
WEB PORTAL USER MANUAL

TTS USER MANUAL

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QUICK START OVERVIEW

The mobile web portal is a personal URL (website) connected to your Tool Tracking database. The licensing for the web portal is based on concurrent licensing. For example, if you have 5 portal licenses, a maximum of 5 people can be logged in to the web portal at a given time. If a 6th person logs in, it will kick out the person that has been in longest. The web portal updates the database in real time and can be used for the following functions

- Find Tool (Look-up/search)
- Identify Tool (get information about tool and last known location)
- Check In (Check in a tool that is currently checked out)
- Check Out (Check out a tool to a Person, Location, or Container)
- Audit (Perform an audit of a Person, Location, or Container)
- QR Generator (Generate a barcode for setting up app licensing)
- Service Test (Confirm your web-service is working properly)

LOGIN

You will be provided with the URL for your company's web portal. This can be accessed on any device with internet access. The Username and Password for the web portal must first be created on the PC interface of the system under File→Employee Administration. Each employee should be given a unique login. Use that login to log in to the web portal.

FIND TOOL

Upon logging in to the web portal, you will be brought to the "Find Tool" Page. This page will auto-populate a list of current tools in your database. The top of the page contains a search field. This search field can be used to narrow down the list of tools. The search field allows you to search by

- Barcode
- Description
- Model Number
- Serial Number
- Out To
- Master
- Funding Source
- Account
- Status
- Condition

Enter the data you wish to search by and press the "Enter" key or press the Magnifying Glass next to the search box. Any matching entries will appear in the list. The bottom right hand corner of the screen will give you the count of Items In the Grid at the current time.

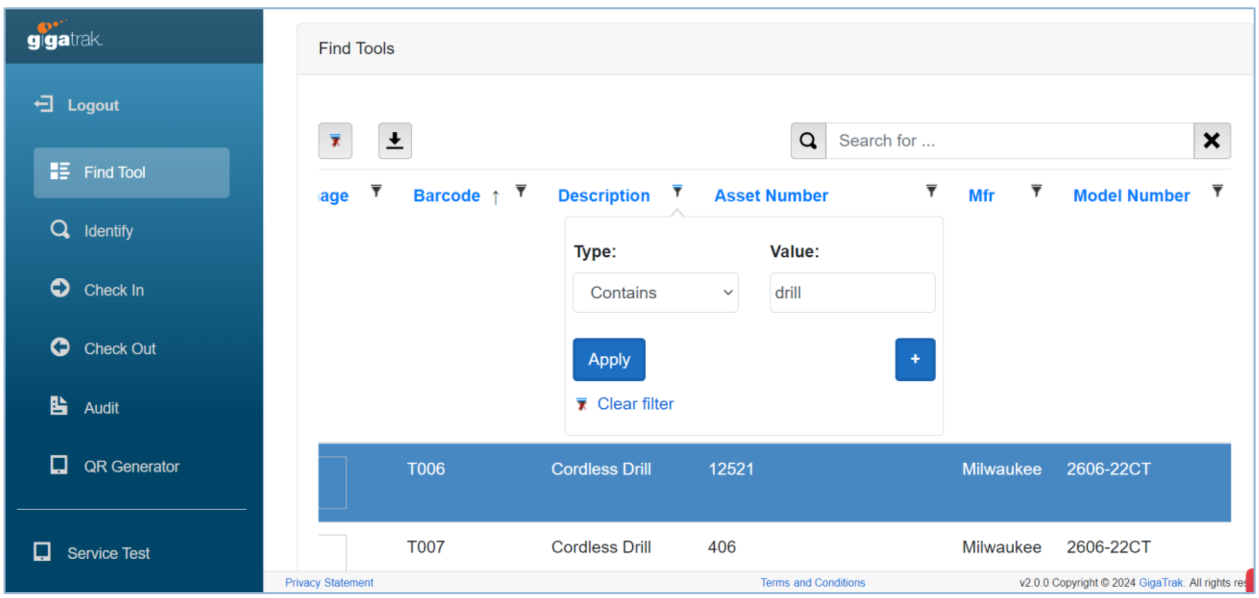
To reset the grid, press the "X" button on the search box.

The bottom of the screen allows you to scroll to see data that may be off the screen. You can also toggle to another page, use the “Go to” to get to a specific page, and change the number of tools that are shown.

Double Clicking on a Tool in the grid will bring you to the “Identify” page of that specific tool.

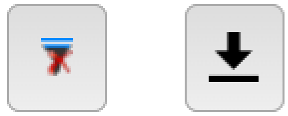
Tool Information cannot be edited on the ‘Find Tool’ page.

The Top Search box allows a user to put in any data to search by. However, you can search by one specific field by clicking on the funnel icon next to the title headers in the grid. For example, to search by a tool description, click the funnel next to the title header “Description” and put in the Type and Value you would like to search by. Press Apply to see search results. You can also build filters further down by clicking on the “+” box.



To reset the filter, press the “Clear Filter” button.

To reset ALL filters click on the colored funnel button at the top left above the grid.

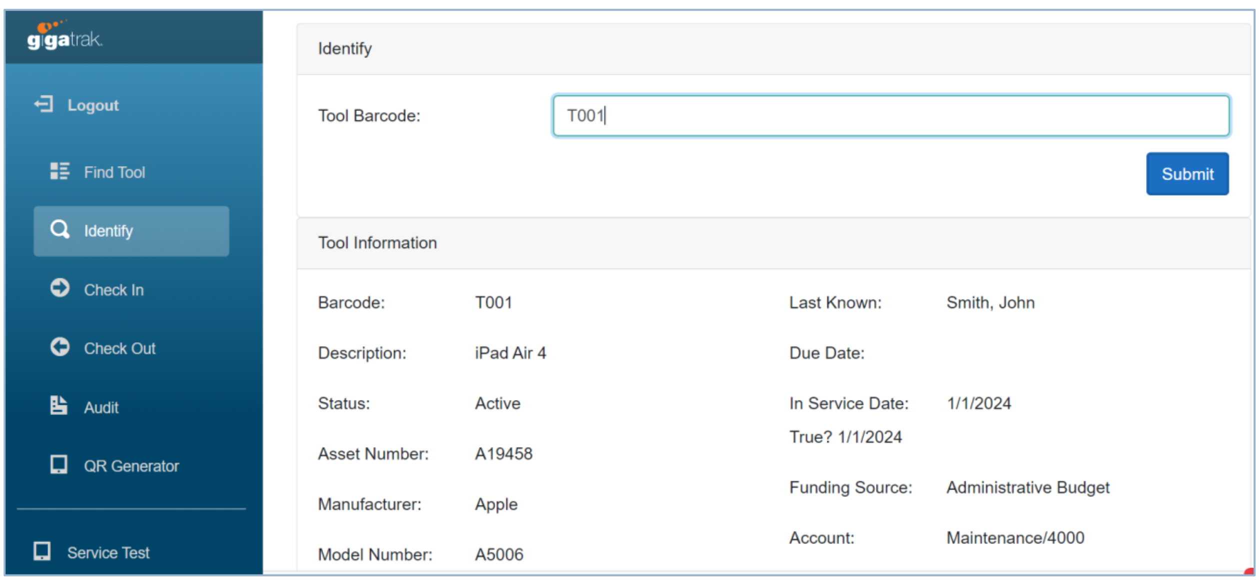


To download an Excel document of the current Tools listed in the grid, click on the down arrow at the top left of the grid.

Clicking on a title header in the grid will sort the grid by that field in Ascending or Descending order.

IDENTIFY

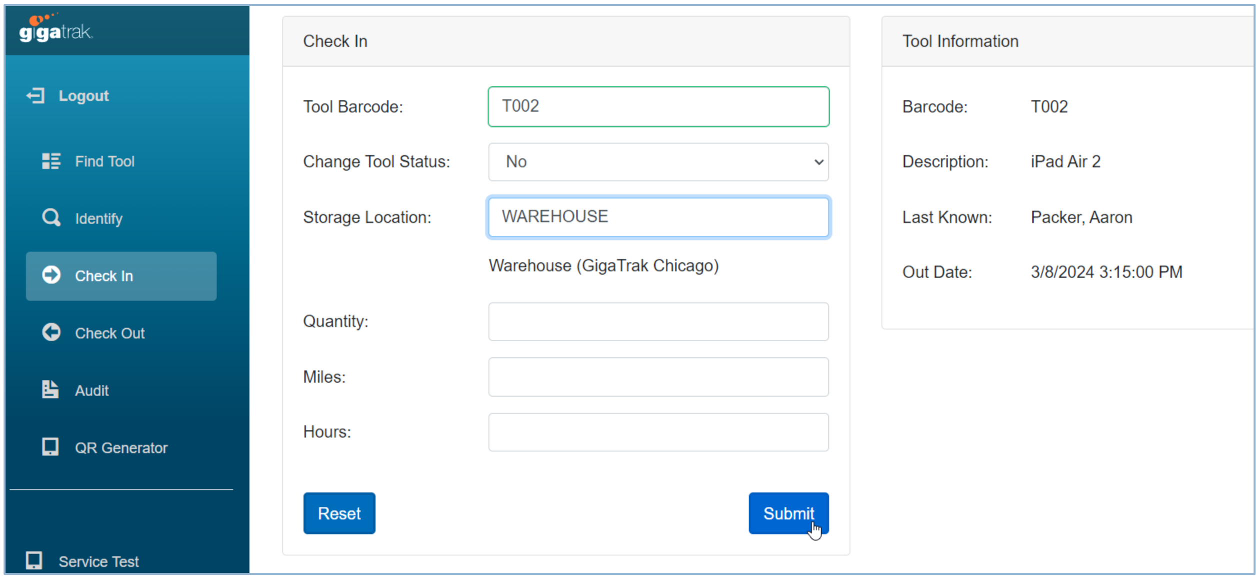
The Identify page is used to get specific details on one individual tool. In the "Tool Barcode" field, scan or enter the barcode of the tool. If needed, press "Submit" or enter on the keyboard. Details of the tool are then displayed below.



Identify is often used to find the whereabouts of the tool as it displays the "Last Known" location. It is also used if a tool is found laying around or if a barcode is found without a tool attached.

CHECK IN

The Check In page allows you to Check back in a Tool that is currently checked out to a Location, Person, or Container. If a Tool is not currently checked out, it cannot be checked back in.



To check a Tool back in, enter or scan the barcode of the tool into the "Tool Barcode" field. Press "Enter" if needed.

The general Tool Information will populate on the right-hand side indicating the Barcode, Description, Last Known Location, and Out Date.

To immediately check the Tool back in without changing the Status or Storage Location, press Submit.

If you would like to change any of this information, use the drop-down menu for "Change Tool Status" to update the Status on the Tool. To change the "Storage Location" enter or scan the barcode of the new Storage Location.

For returning Binned Items, first enter the barcode of the Binned Item. Change the Status if necessary. In the "From" field, enter the Location, Person, or Container the Binned item is being returned from. Finally, enter the quantity being returned. Press Submit.

If the Tool being returned is also being tracked in Miles or Hours, enter the new Miles/Hours before pressing Submit.

Press "Reset" to reset the screen at any time.

CHECK OUT

To check a Tool out to a Person, Location, or Container, first scan or enter the Barcode of the Person, Location, or Container in the “Check Out To:” field.

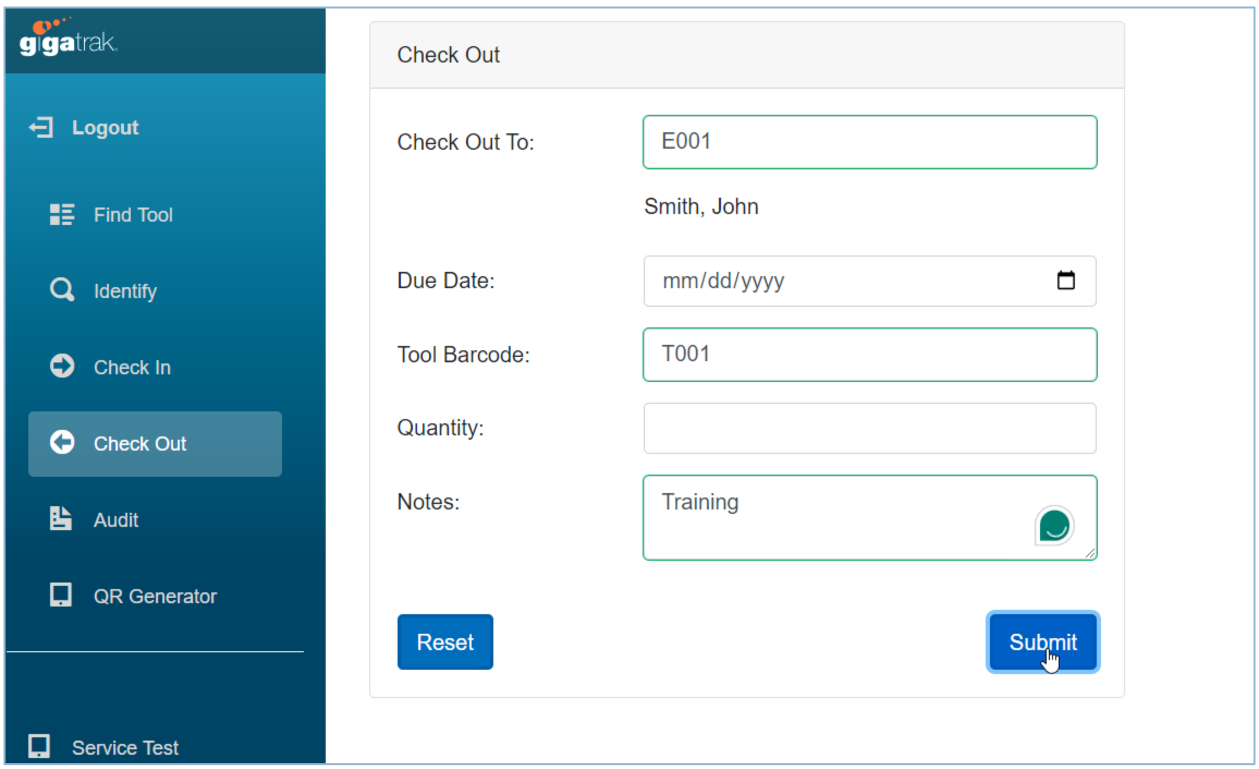
If you want to set a Due Date for the Tool’s return, enter the date in the “Due Date” field.

Next, Scan or Enter the Barcode of the Tool that is being checked out in the “Tool Barcode:” field.

If the item is a Binned Tool, enter the quantity.

Enter any optional Notes.

Press “Submit”.

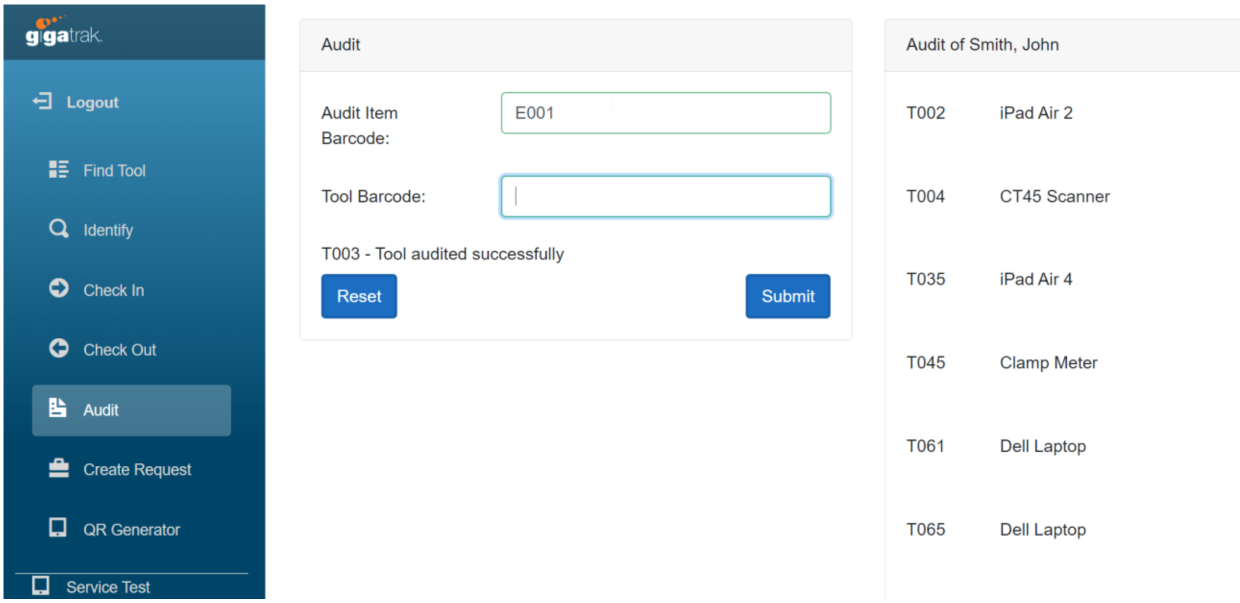


To Reset the page at any time, click “Reset”.

AUDIT

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 on the right-hand side of the screen and a list of the tools that are currently assigned to that barcode will appear below it.



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

Start to scan/enter the barcode of items found with the Employee/Container/Location.

If the scanned barcode matches one of the barcodes in the list, that item will be removed from the list. Continue to scan/enter 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.

The Reset 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" or "Download" icon.)

QR GENERATOR

The purpose of the QR Generator is to easily setup mobile app licenses with your database. If you did not purchase any downloadable mobile app licenses, this is not applicable.

Instead of having each user go through the manual setup process, you can provide with a QR code to scan and they will automatically be connected to the database.

The top information including Location, ID, and Pin will auto generate.

Choose whether to include Pin for Quick Registration. Including the pin will automatically register and activate the user as long as a license is available. Not including the pin will register the user but not activate the device. An administrator will then have to approve the device on the PC version of the system under File-Device Administration.

Choose Connection Type.

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

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

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

Kiosk – 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.

Enter Device Name. Example – John's Phone. Only enter a device name if you plan on providing each user their own QR Code. Leave this blank to have the system auto generate a device name.

Choose Scanner Type.

No Scanner – User will be typing in barcodes or a thumb-sized Bluetooth scanner

Laser Scanner – User purchased an Android barcode scanner with a built-in laser scanner

Camera Scanner – User is using the devices camera to scan barcodes

Download/View Photos – Best left on in live database mode and turned off when in any of the Batch modes as syncing times greatly increase with photos in batch mode.

Pausing The Setup: When providing a user with a QR Code, you can have the setup pause at certain screens for the user to enter their own information. For example, if you choose "Pause on Setting Screen" the user will be able to choose for themselves whether they want photos on or off and whether they want the camera scanner on or off. Choosing to 'Pause on Device Information' will allow the user to enter their own unique name while registering their device. Not pausing will default to all settings you have given while generating the QR Code.

Once finished, press "Generate QR Code". The QR Code can be printed or screen shoted

CREATE REQUEST

The request feature allows a user to Request a category and quantity of items without checking them out. This request is then emailed to any email address. The recipient can then decide what action to take based on the request. You cannot submit a checkout based on a request.

To Create a Request, first choose the Classification and Type from the drop-down menus. Enter the qnatity needed and any Notes. Press “Add to Request”. Continue to add items to request.

Once the first item has been added, a new section will appear on the right-hand side of the screen. This section allows you to submit the request as a whole once finished.

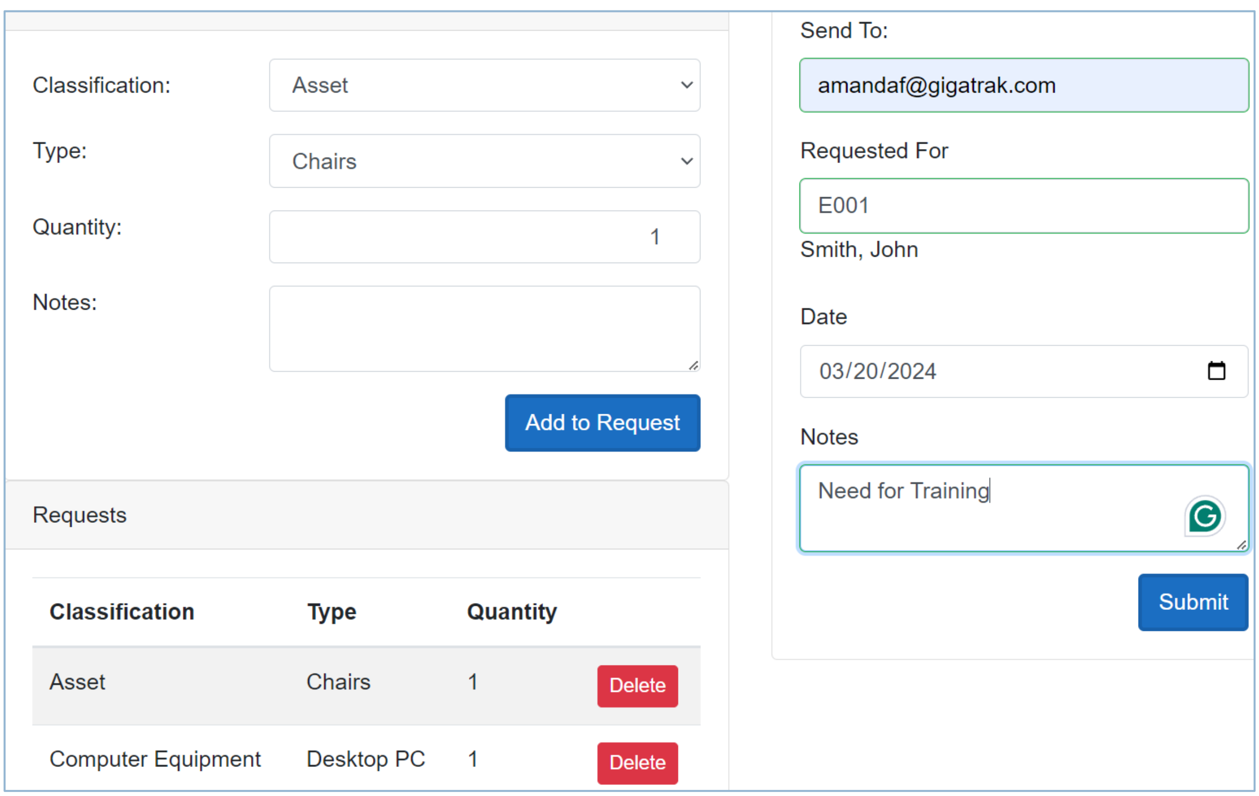
Send to: Enter the email address of where you would like to send the request.

Requested For: Enter the barcode of the person requesting the items

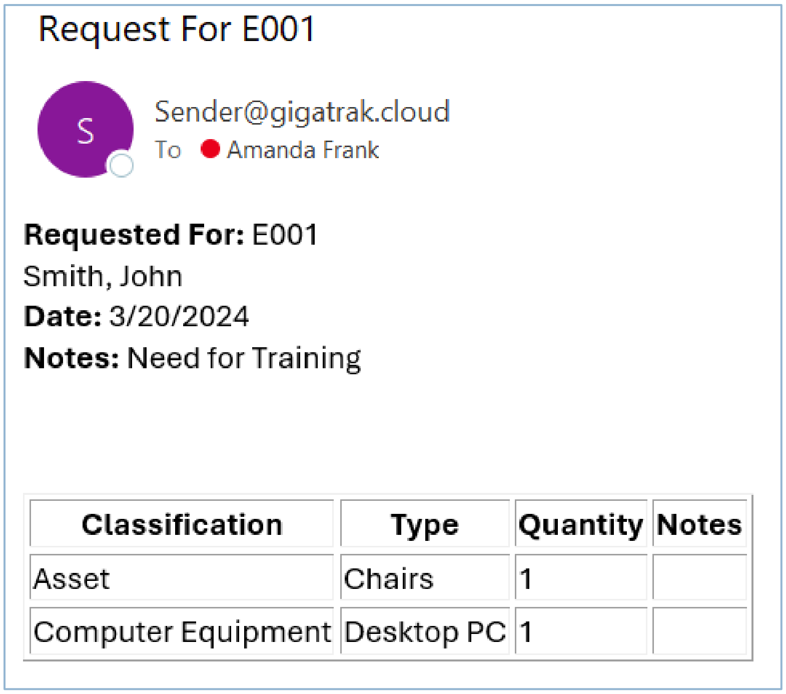
Date: Enter Date the items are needed

Notes: Enter any Notes as a whole for the request

Press Submit. Upon pressing “Submit”, the request will be submitted and the screen will clear.



Example of the email that will be sent,


Request For E001

S

Sender@gigatrak.cloud

To Amanda Frank

Requested For: E001

Smith, John

Date: 3/20/2024

Notes: Need for Training

Classification	Type	Quantity	Notes
Asset	Chairs	1	
Computer Equipment	Desktop PC	1	

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