



**TOOL TRACKING SYSTEM
USER MANUAL**

TTS USER MANUAL

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QUICK START OVERVIEW

Now that you have installed TTS or logged in to the portal (cloud), you are ready to begin using the system. This brief Quick Start Overview and the following User's Manual provide the general information needed to begin entering data into the system and using TTS for the first time.

INSTALLATION

STEP 1

Follow the instructions to install the system using the "PC Installation Guide" provided to you in your Order Acknowledgement email. 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. The cloud portal can be accessed at portal.gigatrak.cloud

REGISTRATION – (SELF-HOSTED ONLY)

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. The barcode will be used when performing a checkout to a Person.

The screenshot shows a web-based form titled "Employee Administration". At the top right, there is a "Save" button. Below the title bar is a section labeled "Employee Info" containing several input fields. The fields are: "First Name:" with the value "Mark", "Last Name:" with the value "Avery", "Middle Initial:" which is empty, "Barcode:" with the value "MAVERY", "Log in Name:" with the value "MARK", "Password:" with the value "*****" and a note "(Min. 5 characters)", "Phone:", "Alt. Phone:", "E-mail:", and "Notes:". To the right of the "Notes" field is a "Status" dropdown menu with two options: "Active" (selected with a radio button) and "Inactive".

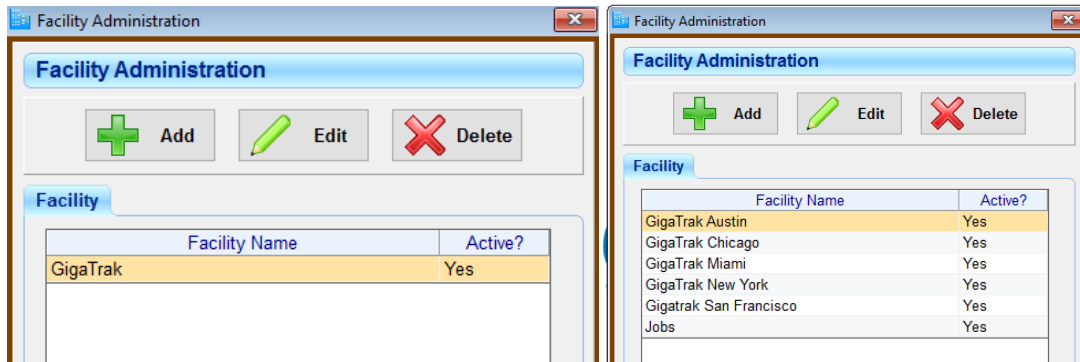
If the employee will be logging in to the system and performing transactions (on the PC or mobile app), they will need to be given a login name and password and have their access levels set on the right-hand side. If the employee will not be logging in but you would like to check items out to them, only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

Employee profiles are unlimited.

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. Another fake facility could be called "Customers".

The image shows a screenshot of the 'Facility Administration' form. At the top, there are 'Save' and 'Cancel' buttons. The form contains the following fields:

- Name: Jobs
- Address: (empty text box)
- City: (empty text box)
- State: (empty dropdown menu)
- Zip: (empty text box)
- Notes: (empty text area)

At the bottom, there is a 'Status' section with two radio buttons: 'Active' (selected) and 'Inactive'.

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 unique 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.*

The screenshot shows the 'Location Administration' form with the following fields and options:

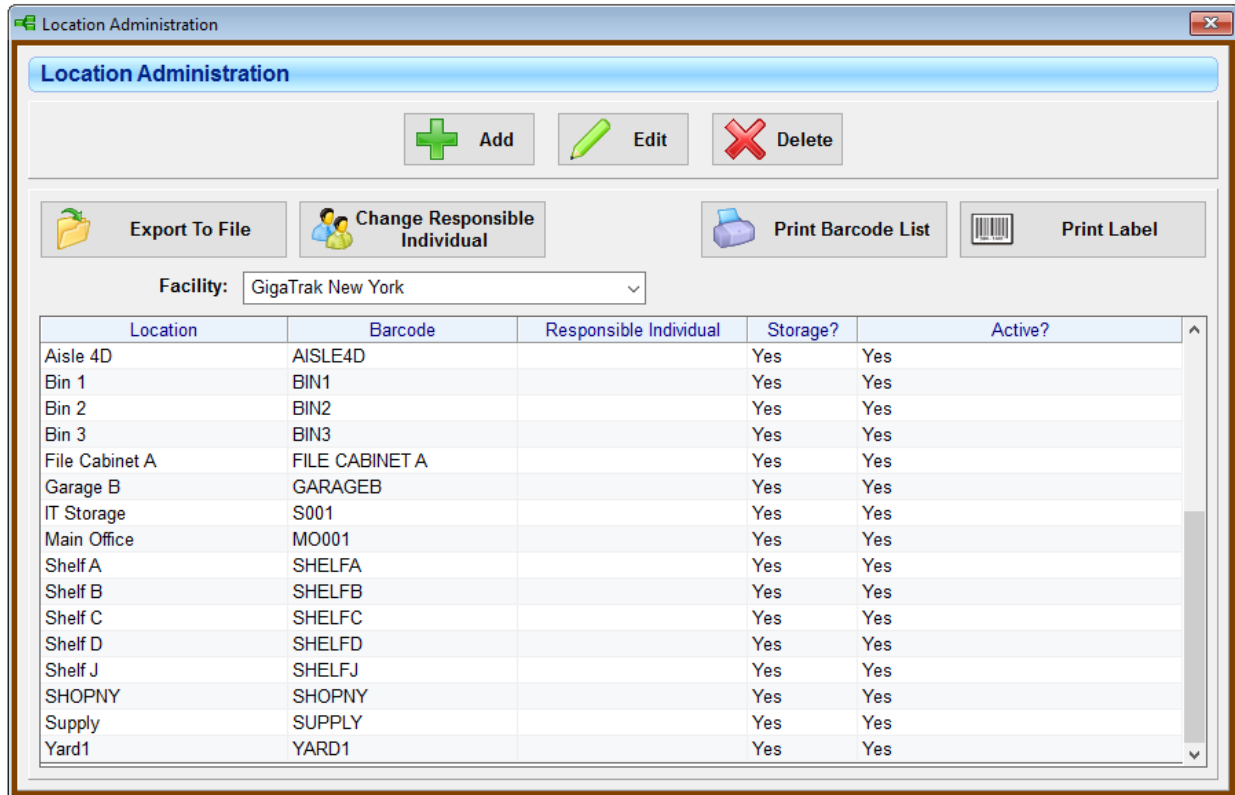
- Facility:** GigaTrak Chicago (dropdown menu)
- Location:** Warehouse (text input)
- Barcode:** WAREHOUSE (text input)
- Storage Location:** (radio button)
- Address:** (empty text input)
- Responsible Individual:** (empty dropdown menu)
- Notes:** (empty text area)
- Status:** Active, Inactive (radio buttons)

The screenshot shows the 'Location Administration' interface with a list of locations and various action buttons:

- Buttons:** Add, Edit, Delete, Export To File, Change Responsible Individual, Print Barcode List, Print Label.
- Facility:** GigaTrak Chicago (dropdown menu)

Location	Barcode	Responsible Individual	Storage?	Active?
Warehouse	WAREHOUSE		Yes	Yes

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 Support → Location Administration, using the Facility drop-down menu, pick the Jobs Facility or a Facility you have created. Press “Add”. Put in your job or location 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.

The screenshot shows the 'Location Administration' window in 'Add' mode. At the top, there are 'Save' and 'Cancel' buttons. Below that, there are 'Add New Facility' and 'Add New Employee' buttons. The form contains the following fields and options:

- Facility:** Jobs (dropdown menu)
- Location:** Bell River (text input)
- Barcode:** 561231 (text input)
- Responsible Individual:** Becker, Joshua (dropdown menu)
- Notes:** (empty text area)
- Status:** Active (radio button selected), Inactive (radio button)
- Location Type:** Checkout/Usage Location, Storage Location
- Address:** 6000 Bell River Way, Bell River, WI 53662 (text area)

The screenshot shows the 'Location Administration' window in a list view. At the top, there are 'Add', 'Edit', and 'Delete' buttons. Below that, there are 'Export To File', 'Change Responsible Individual', 'Print Barcode List', and 'Print Label' buttons. The 'Facility' dropdown is set to 'Jobs'. The main area contains a table with the following data:

Location	Barcode	Responsible Individual	Storage?	Active?
2018566	2018566	Avery, Mark	No	Yes
Bell River	BELLRIVER	Becker, Joshua	No	Yes
Burger King	BURGERKING2018	Rivers, Jason	No	Yes
CVS	CVS2018	Bales, Aaron	No	Yes
Danny's Cafe	DANNYSCAFE	Matthews, Clay	No	Yes
David's Insurance	DAVIDSIN	Johnson, David	No	Yes
Dental Associates	DENTALA18	Packer, Aaron	No	Yes
Fern Town Hall	FERNTOWN	Becker, Joshua	No	Yes
Festival Foods	FESTIVAL	Avery, Mark	No	Yes
GigaTrak	GIGATRAK123	Frank, Amanda	No	Yes
House Market	2017HOUSE	Tubman, Harriet	No	No
Jackson Street	JACKSON18	Hetzel, Arnie	No	Yes
Johnson Bank	JOHNSONBANK	Avery, Mark	No	Yes
Jones Street	JONESSTREET	Rivers, Jason	No	Yes
Kay Jewelers	KAY2018	Smith, John	No	Yes
Kmart	KMART	Poelman, Josh	No	Yes

Please note this is only one example of checkout/usage locations. Every situation is different. You may be checking out to classrooms, suppliers, customers 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

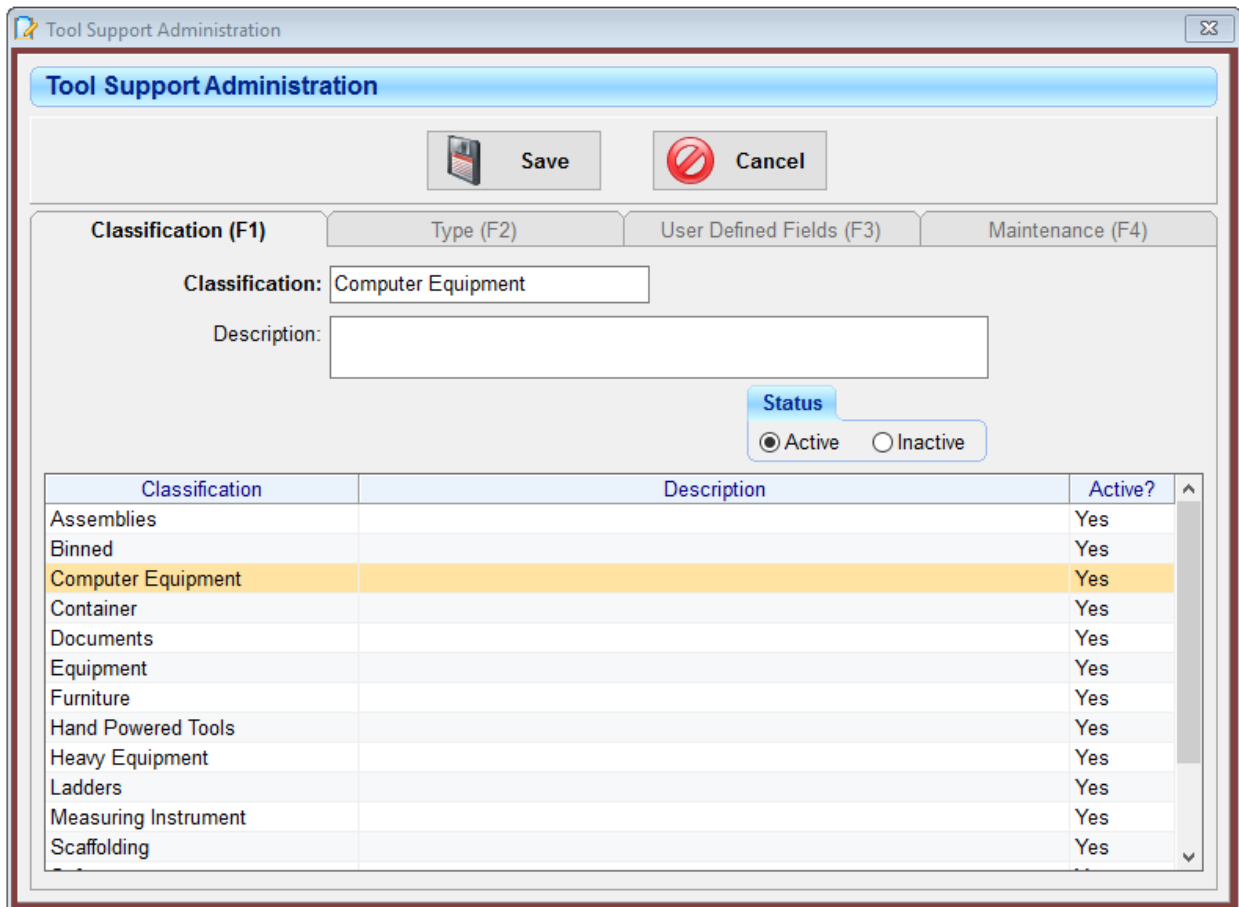
another or one location to another, it is considered a checkout to checkout; not a transfer. Please contact training@gigatrak.com to see if transfer is applicable in your situation.

CLASSIFICATIONS/TYPES

STEP 6

Next, you need to create Classifications and Types for your tools (aka Categories and Sub-Categories). 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 into 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”,



The screenshot shows the 'Tool Support Administration' window. At the top, there are 'Save' and 'Cancel' buttons. Below that, there are tabs for 'Classification (F1)', 'Type (F2)', 'User Defined Fields (F3)', and 'Maintenance (F4)'. The 'Classification (F1)' tab is active, showing a form with the following fields:

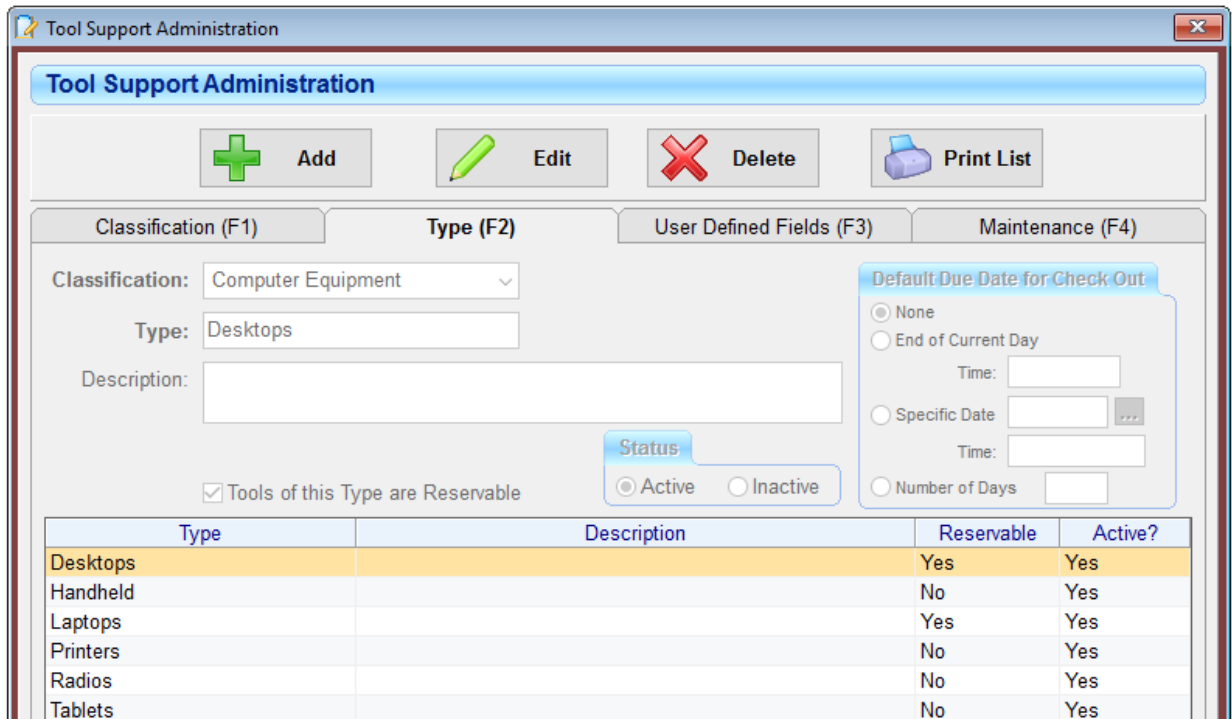
- Classification:** Computer Equipment
- Description:** (empty text box)
- Status:** Active Inactive

Below the form is a table with the following columns: Classification, Description, and Active?. The table contains the following data:

Classification	Description	Active?
Assemblies		Yes
Binned		Yes
Computer Equipment		Yes
Container		Yes
Documents		Yes
Equipment		Yes
Furniture		Yes
Hand Powered Tools		Yes
Heavy Equipment		Yes
Ladders		Yes
Measuring Instrument		Yes
Scaffolding		Yes

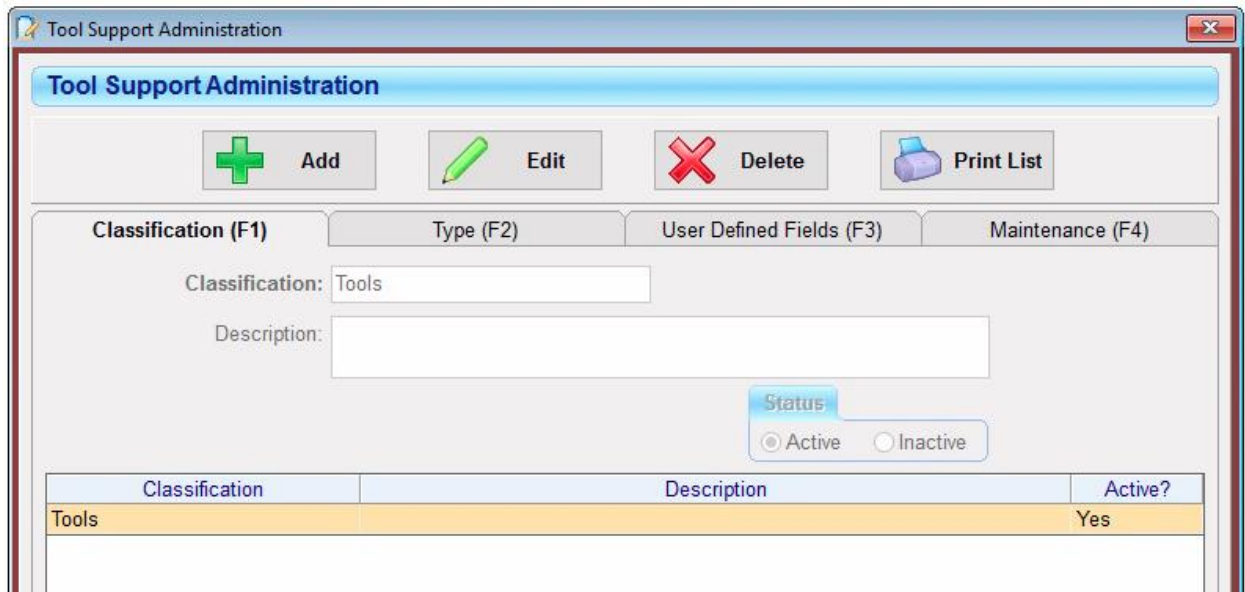
Press “Save”.

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’.

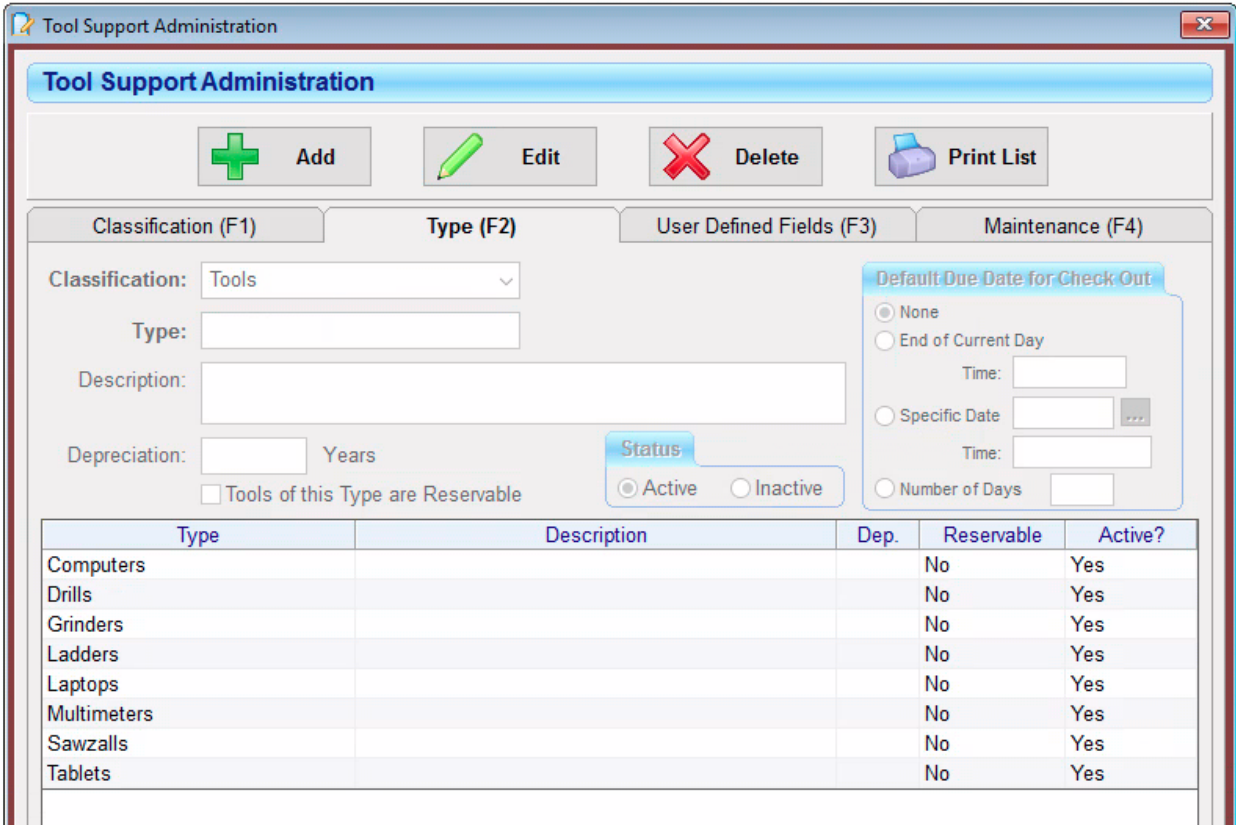


Description, depreciation, and default due dates are all optional.

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



Underneath the general Classification of Tools, I can create more specific types of Tools like Drills, Sawzall's, Computers, Laptops, etc.



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 real tools yet and will get to further describe the tool when you enter a specific item. 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.

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 an existing tool and simply change the barcode and optional serial number (as this should be unique to every tool).

Example of an added Tool with the bare minimum information (**bolded fields only**),

Tools

Find Tool (F1) **Tool Information (F2)** Tool History (F3)

Tool Information

Master: ...

Classification: Computer Equipment

Type: Laptops

Description: Dell Laptop

Facility: GigaTrak Chicago

Storage Location: Warehouse

In Service Date: 1/19/2024 ...

Barcode: T001

Asset Number:

Condition:

Manufacturer:

Model Number:

Serial Number:

Funding Source:

Account:

Print Label

Status

Active

Retired

Lost

Broken

Save

Cancel

Primary Data Purchase / Warr. Images & Docs User Defined Data Miles / Usage

Container: Binned Item:

Note:

Image Unassigned

Example of an added Tool with all information,

Tools

Find Tool (F1) **Tool Information (F2)** Tool History (F3)

Tool Information

Master: IPAD2 ...

Classification: Computer Equipment

Type: Tablets

Description: iPad Air 4

Facility: GigaTrak Chicago

Storage Location: Warehouse

In Service Date: 1/1/2024 ...

Barcode: T001

Asset Number: A19458

Condition: Excellent

Manufacturer: Apple

Model Number: A5006

Serial Number: DF45123

Funding Source: Administrative Budget

Account: Maintenance / 4000

Print Label

Google Maps

Status

Active

Retired

Lost

Broken

Previous **Next**

Add

Edit

Delete

Copy

Print Tool Info

Primary Data Purchase / Warr. Images & Docs User Defined Data Miles / Usage

Container: Binned Item:

Note: Rose Gold


Latitude: 42.5418

Longitude: -87.8457

Check Out

To:

Due Date: ... Time:

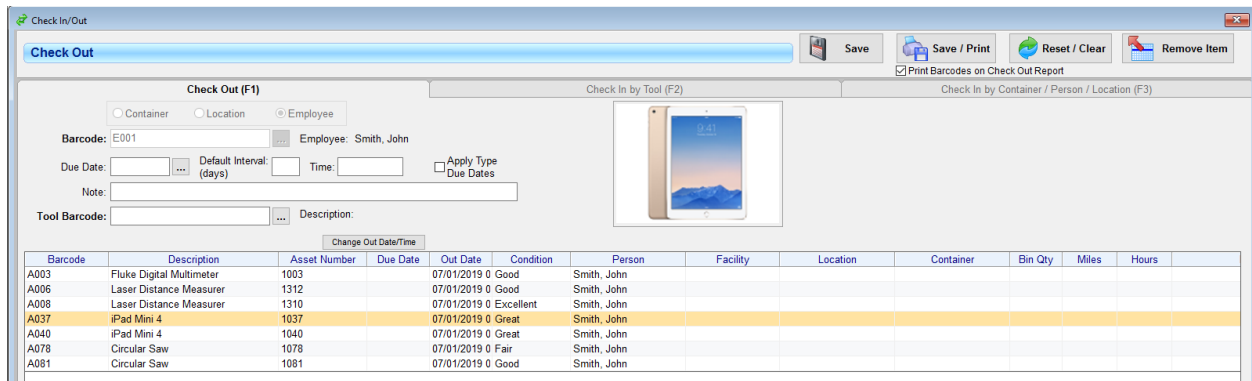


Remember only bolded fields are required. Everything else is optional, supporting information.

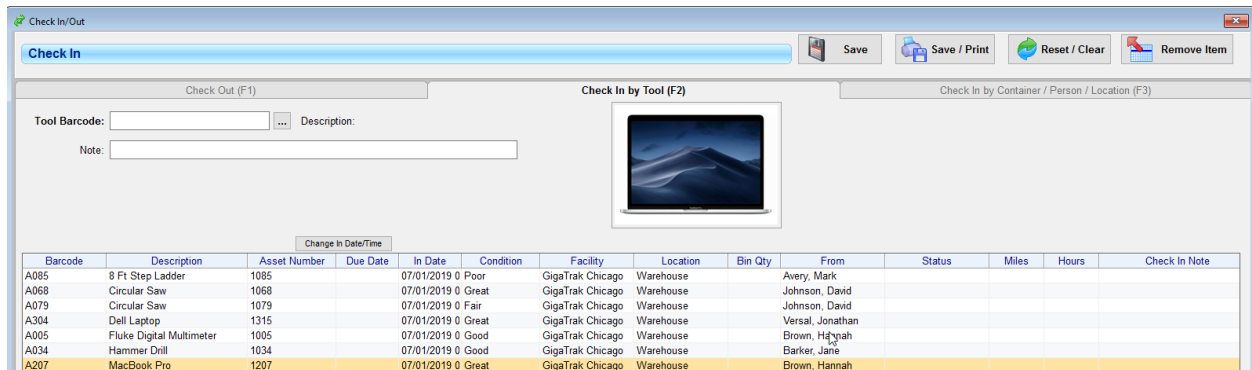
CHECK TOOLS IN/OUT

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 or choose from the 'ellipses' look-up box. Next, scan, enter, or look-up the barcode of the tool(s) you would like to checkout. They will be added to the grid. Finally, press "Save" or "Save/Print".



To Check Tools back into 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".



Upon Check-in, when a tool is added to the grid, you have the ability to double click on Condition, Facility, Storage Locations, and Status to update this information upon check-in. A check-in note can also be added by double clicking in the respective 'Check-in Note' box. However, if everything is staying the same, leave the information as is and press "Save".

REPORTS

STEP 9

There are over 40 canned reports in the system that can be run at any time. The most important reports are 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”.

All reports can be printed as a PDF, saved electronically, emailed via Outlook or exported straight to Excel. GigaTrak does not integrate with any other software. However, you can export all information and do data dumps into the systems if needed.

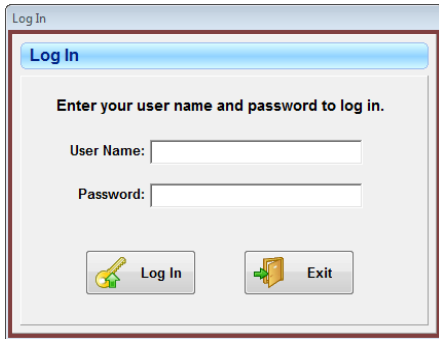
You have now finished doing the bare minimum setup to add tools, check them in/out, and run reports. This completes the TTS Quick Start Guide. Please see the below User Manual for full details on the remainder of the system.

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

The following User Manual goes more in depth with specific functions of the system and features.

GETTING STARTED

Upon opening the program, the screen at left will appear. You will be prompted to enter a User Name and Password. If it is the first time logging in, you will use the Admin User's data:



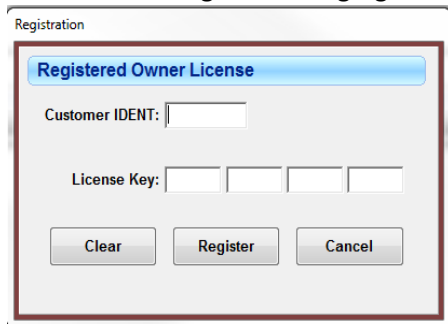
Username: ADMIN

Password: ADMINUSER

Other users may be added to the system after setup. After users are entered into the system, they should each log in under their own User Name and Password.

REGISTRATION – (SKIP FOR CLOUD)

After logging in as Admin, click File on the menu and select Registration Forms. This step is important because it assigns licensing rights to you. Entering the information will unlock the program for your licensed use.

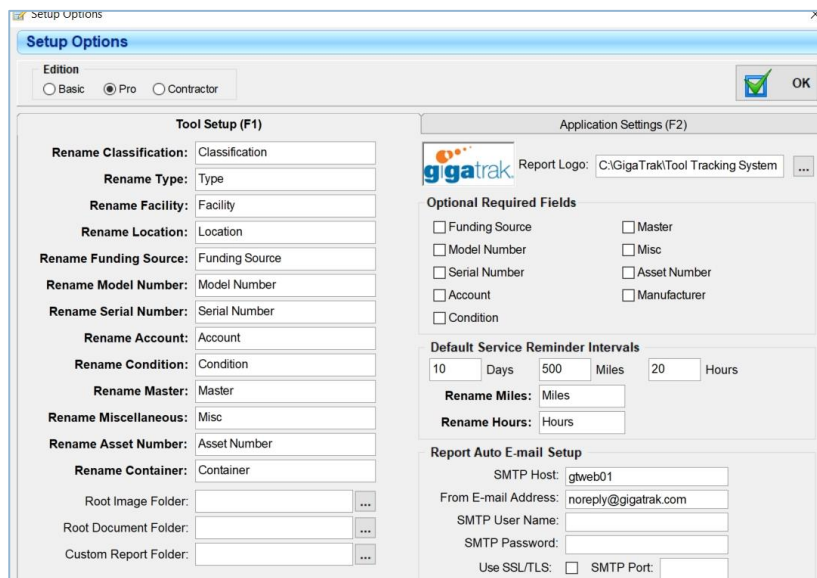


The Four Digit Customer Identifier and the 16 digit License Key will be provided by Gigatrak when the product is purchased. In the Registration forms, you will also find the Device and Web Portal registration forms.

If you purchased a mobile app license, you will need to register that license key separately.

SETUP OPTIONS

After registering your product, click File on the menu and select Setup Options. You must be logged in as the Admin in order to access the Setup Options.



TOOL SETUP

This option can be used to change the names of the parameters to fit your needs. This makes up the structure of the system. Cloud accounts will not have a section titled "Report Auto Email Setup" or Root Image Folders".

Classification, Type, Facility, Location, Condition, Account and Funding Source are parameters tied to tools with drop-down menus created by each organization. Model Number, Serial Number, Miscellaneous, and Asset Number are free text fields. Master is an optional feature in the system where you can create Master Templates for commonly purchased tools to force consistency with data entry (often renamed to 'Template'). Container is a type of tool that gets other tools checked out to it, and then moved together around as a whole (Jobox, Tool Box, Kit, Trailer, etc.). Each title field can be renamed to suit your needs. Changing a title field is a system wide change. **It is not recommended to change the first 4 title fields (Class, Type, Facility, Location) as they have a parent/child relationship and can make the system structure confusing. Classification is often renamed to "Category" and Type to "Sub-Category".**

If you would like to alter any of the names, type in the desired value and then click the OK button.

Every tool has certain required fields when doing data entry. At a minimum, every tool in the system must have a **Class, Type, Description, Storage Facility, Storage Location, In-Service Date, and Barcode**. However, you can make any of the optional fields required in the setup options by marking each field as required. This is a system wide change and will be required for ALL tools (Binned items do not track Condition or Serial number even if required). This includes data entry on both the PC version and the mobile application.

Report Logo - If you wish to attach your own company logo to the system so that it shows on reports and lists generated in the system, click on the ... next to "Report Logo". If you are cloud-hosted, you must first put your logo in your cloud file browser. If you are self-hosted, right click on your TTS shortcut, and press Open File Location. Paste your logo in this file location. Once you click on the ... in the setup options, your logo will be available to click on and press "Ok". Be sure to Save the Settings.

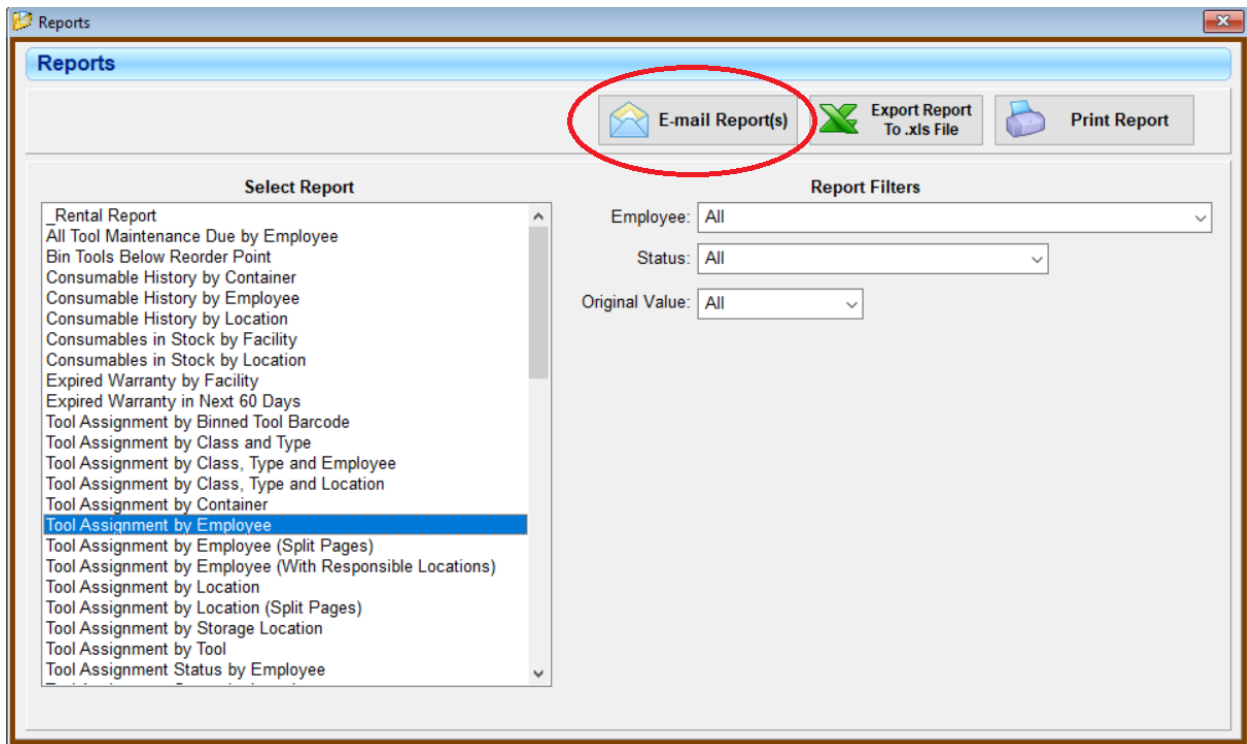
On Prem Only - *The root image folder is the default location for images that you wish to tie to a tool. If the image is in the default location, only the file name is required in the tool screen to identify the image.*

The Custom Report Folder is the location for custom report files. If a custom report is ordered, the report file should be placed in a folder, and the path to the folder should be set in this option.

The Report Logo allows the display of a company logo on reports. You can select a .bmp, .gif, or .jpg file. To clear a logo after it is selected, click the "Select" button and click Cancel on the selection screen.

Default Service Reminder Intervals (Pro and Contractor Edition only) can be set on this screen for reminders on when service comes due on a Tool. The notification can be different depending on whether you are tracking the maintenance in Days, Hours or Miles. Setting the reminder interval in the Setup Options is a system wide setting for all Tools. However, upon entry of specific Maintenance Types in the Support tab, certain types of tools can have a different reminder interval than the default set here. Hours or Miles can also be renamed if you would like to track maintenance in a different way. For example, you could rename them to "Cycles, Count Hits, Spins, Usage" etc.

Report Auto Email Setup (self-hosted only) is used for the automatic email of check-in and checkout reports when a transaction is performed through the PC version of the system and for setting up scheduled reports. This section must be filled out by your IT department in order for automatic emails to be sent. This feature is also used to send group emails through the reports section. Highlighting a specific report name will show an “Email Report(s) button at the top if that report is able to be mass emailed. If the Auto Email section is setup, and a user presses this button while highlighted on a report, an email will be sent out to each user associated with that particular report. For example, if 50 users have Tools checked out and I would like to send a report to each user on what they have; I can easily press this button instead of emailing each person individually. Cloud accounts automatically have this option.

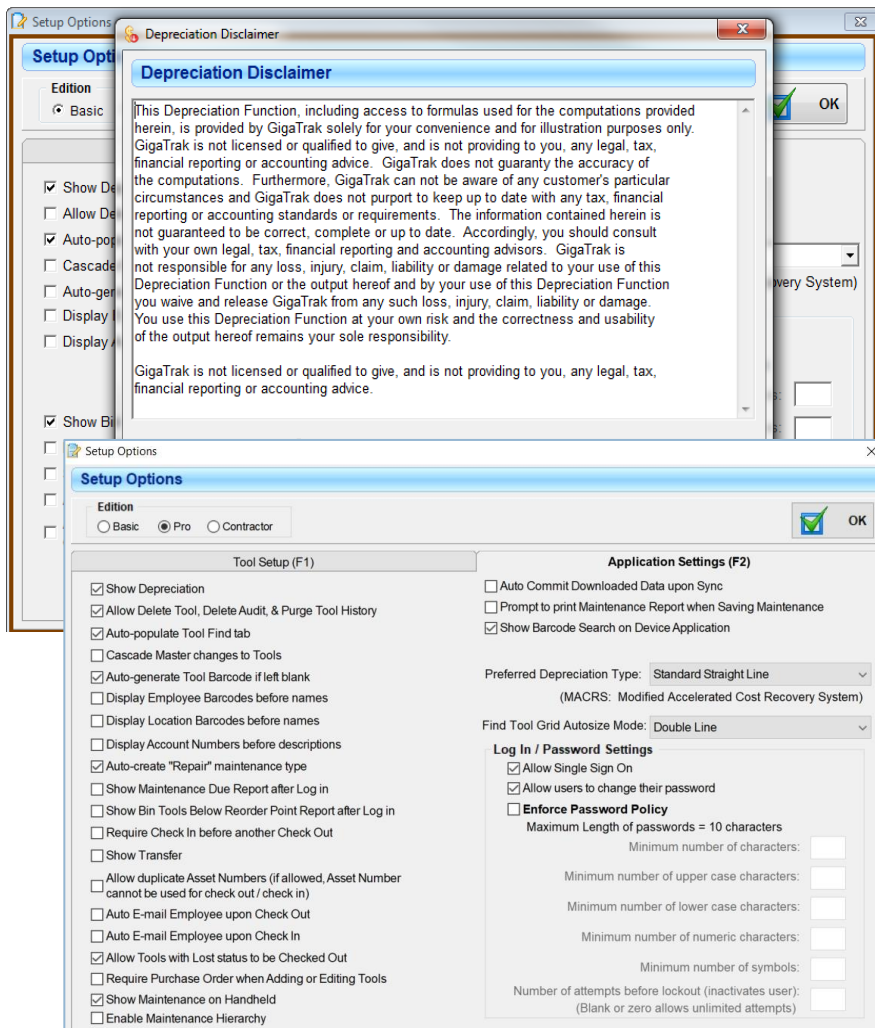


APPLICATION SETTINGS

File→Setup Options, second tab, Application Settings control various functions in the Tool Tracking application.

SHOW DEPRECIATION/PREFERRED DEPRECIATION TYPE

If Show Depreciation is checked, then the depreciation information will be visible on the Tool information screen. The Tool Depreciation Report will also be available on the Reports screen. If the checkbox is not checked, the depreciation information will not be visible and the depreciation reports will not be shown.



The checkbox cannot be checked until you accept the disclaimer.

After accepting the disclaimer, the Preferred Depreciation Type selection will be enabled. This will be the default selection when adding new tools on the Tool Information screen. You can change your Preferred Type of Depreciation from the drop-down menu. Choosing a preferred type does not limit you to only using that type. You will be able to switch the type of depreciation per tool if needed.

ALLOW DELETE TOOL, DELETE AUDIT, & PURGE TOOL HISTORY

If checked, then the Delete button will be displayed on the Tool Information (F2) screen, and the Purge History button will be displayed on the Tool History (F3) screen and the Member/Job History Screen (Contractor Edition only) allowing any user with Tool edit rights to delete tools in the system, delete history of Tools and delete Member/Job Information (Contractor Edition only). If the checkbox is not checked, the Delete button and the Purge buttons will not be displayed. Furthermore, under File→Purge History, any user with Tool Edit rights will be allowed to mass purge all tool history records in the system prior to a specific date. For example, if you have had the system for 20 years, and no longer want to hold on to records for the first 10 years, you can put in a date and the system will remove all history records on every tool prior to that date. This can help free up space and potentially allow the deleting of old locations that are no longer being used. Last, having this option on allows any user with Tool Edit rights to delete Tool Audit Reports in the Reports screen.

AUTO-POPULATE TOOL OR FIND TABS

When checked, the system will automatically display information when a Find screen is opened (Tools Screen F1 tab, Members screen F1 tab). If not checked, you must first click “Extract Data” to view a listing. When this option is turned on, tool lists and member lists will auto populate all active tools and all members without first having to search for something. It is recommended that if you have a lot of tools or members, turning this option off can greatly reduce the load time of the screen.

CASCADE MASTER/CATALOG CHANGES TO TOOLS

This selection gives you the option to push any changes from the Master/Catalog function to each respective Tool assigned to the Master/Catalog Number. **CAUTION: Changes to the Master/Catalog may RESET User-Defined data to the values set within the Master/Catalog.** Example, if you have a Master Template/Catalog and would like to update the description, there is a potentially to push this updated description to all tools assigned to that Master in the system without having to change each tool individually.

AUTO-GENERATE TOOL BARCODE

This option creates a new barcode ID when adding new tools IF NO BARCODE is assigned. Use this option if you intend to design and print your own barcodes and you would like the system to pick a barcode for you. If you have chosen to use pre-printed barcodes or are switching from an existing system do not select this option. The system will always use the next barcode in sequential order of the last one used to auto-populate (it is recommended you manually enter the first barcode with the sequence you would like to start at).

DISPLAY EMPLOYEE BARCODES BEFORE NAMES

This applies to several report selection filters and drop-down menus. If you view employees primarily by their names, leave this unchecked. If you prefer tracking employees by the Barcode ID, then check the checkbox.

DISPLAY LOCATION BARCODES BEFORE DESCRIPTIONS

This applies to several report selection filters and drop-down menus. If you view locations primarily by their names, leave this unchecked. If you prefer tracking locations by the Barcode ID, then check the checkbox.

DISPLAY ACCOUNT NUMBERS BEFORE DESCRIPTIONS

This applies to several report selection filters and drop-down menus. If you view accounts primarily by their names, leave this unchecked. If you prefer tracking accounts by the Barcode ID, then check the checkbox.

AUTO-CREATE REPAIR MAINTENANCE TYPE (PRO AND CONTRACTOR EDITION ONLY)

This option type will insert a generic repair maintenance type anytime a new Classification and Type of tool is created. A "Repair" maintenance type can be used when a Tool randomly breaks and needs a repair. It has no interval and never 'Comes Due', it is just there for when an item breaks. It is highly recommended to mark this box before any data entry.

SHOW MAINTENANCE DUE REPORT AFTER LOG IN (PRO AND CONTRACTOR EDITION ONLY)

By selecting this option, the system will automatically display the "Maintenance Due" report immediately following log in.

SHOW BIN TOOLS BELOW REORDER POINT REPORT AFTER LOG IN

By selecting this option, the system will automatically display the "Binned Tools Below Reorder Point" report immediately following log in.

REQUIRE CHECK IN BEFORE ANOTHER CHECK OUT

Checking this box will require a checked out tool to be checked back in to the storage location before it can be checked out again. Leaving this unchecked will allow a tool to be checked out again without being returned to the storage location. This is called a Checkout to Checkout and not a Transfer.

SHOW TRANSFER

This option can be activated if you would like to relocate tools from one Storage Facility/Location to another. Once you check this and click the OK button, the Transfer tab will appear on the toolbar. Please note that very few customers use the Transfer option as it's meant for multiple facilities and requires the setup of Transfer Locations such as shipping and receiving docks.

ALLOW DUPLICATE ASSET NUMBERS

The Allow duplicate Asset Numbers gives the option to have multiple of the same Asset Number, but if selected, the Asset Number field cannot be used for check out/check in of a tool. The Asset Number field is often used as a back-up to the barcode. If your company already had some kind of unique

identifier for a Tool before implementing our system, it is recommended you use the Asset Number field if it is different than the barcode. If this option is off, all Asset numbers are required to be unique and can be used in place of the barcode for checking tools in and out.

AUTO E-MAIL EMPLOYEE UPON CHECKOUT

Selecting this option will automatically generate a Check Out report to be sent to an employee via email (Microsoft Outlook only). For self-hosetd systems, the Auto Email section on the first tab of the Setup Options must be filled out. For all customers, each employees email address must be listed in their profile. Automatic Email Reports will only be sent out when transactions are performed through the PC interface.

AUTO E-MAIL EMPLOYEE UPON CHECKIN

Selecting this option will automatically generate a Check In report to be sent to an employee via email (Microsoft Outlook only). For self-hosetd systems, the Auto Email section on the first tab of the Setup Options must be filled out. For all customers, each employees email address must be listed in their profile. Automatic Email Reports will only be sent out when transactions are performed through the PC interface.

ALLOW TOOLS WITH LOST STATUS TO BE CHECKED OUT

If checked, Tools marked with a 'Lost' status can be checked out. Upon checkout, the Tool will automatically switch the status back to 'Active' (does not notify the user). If left unchecked and a lost tool is checked out, the user will be prevented from performing the transaction as the tool is marked as "lost". In this example, the user can then go manually switch it back to active.

REQUIRE PURCHASE ORDER WHEN ADDING OR EDITING TOOLS

If checked, the purchase order field will become required for adding in a new tool or performing edits to an existing tool.

SHOW MAINTENANCE ON HANDHELD (PRO AND CONTRACTOR EDITION ONLY)

This option allows maintenance records to be performed on tools when using the mobile application. Unchecking this box will remove the "Maintenance" button from the mobile app for all users.

ENABLE MAINTENANCE HIERACHY

The Maintenance Hierarchy feature allows users to set up different maintenance types in a hierarchy. Therefore, completing a higher level of the Maintenance will complete subsequent lower levels. See the Maintenance section of this user manual for more information.

PROPMT TO PRINT MAINTENANCE REPORT WHEN SAVING MAINTENANCE

If on, this option will prompt for printing a maintenance report when maintenance is saved at any point on the PC version of the system.

AUTO COMMIT DOWNLOADED DATA UPON SYNC (SELF-HOSTED ONLY)

If checked, this option will result in the data from the handheld being automatically committed to the PC database upon docking the handheld. If unchecked, the process to sync & commit data will be “Sync” → “Commit” → “Sync”. This option is only for old Windows Mobile handheld units.

SHOW BARCODE SEARCH ON DEVICE APPLICATION

If checked, a search option will appear on the mobile app allowing users to choose a name or location from a look-up box. A magnifying glass icon will appear on a number of screens allowing users to look up barcodes and choose from a list of options.

ALWAYS ALLOW CONDITION EDIT ON CHECK OUT/ CHECK IN

If this option is turned on, users performing check in/out transactions will be able to change/update the condition on tool even if they have simple rights for check in/out and/or view only rights to Tools.

PREFERRED DEPRECIATION TYPE

If “Show Depreciation” is turned on, the ability to pick a preferred type of depreciation becomes available. Choosing a preferred type will automatically set each tool to this type of calculation. However, you can manually change a tools depreciation type if needed.

FIND TOOL GRID AUTOSIZE MODE

To change how the information is displayed on the F1 tab of the Tools icon, choose which option looks best depending on the information in your database. Single line may cut off information depending on much data is in that field. Auto sizing will display all information in each field and each row may appear a different size.

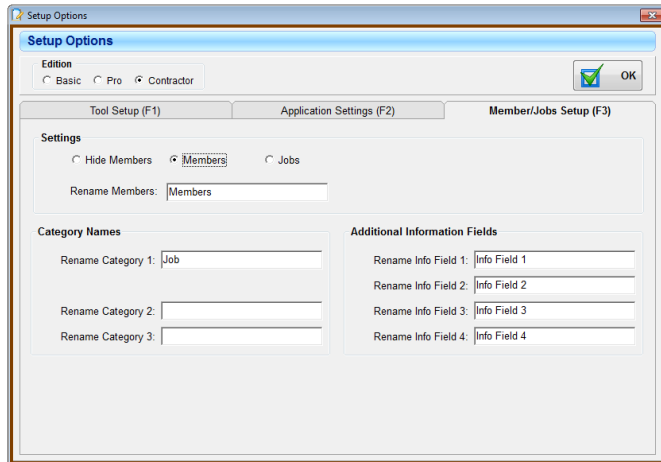
LOG IN/ PASSWORD SETTINGS

On the right side of the Application Settings box, there is an area for **Log In /Password Settings**. You can choose to **Enforce Password Policy**, by choosing a Minimum number of characters, Minimum number of upper case characters, Minimum number of lower case characters, Minimum number of numeric characters, Minimum number of symbols, and Number of attempts before lockout (inactivates users). Maximum password length is 20 characters. There is also the option to allow users to change their password. Selecting this option will give access for users within the system to change their own password under File-Change Password. If not selected, the Admin or anyone with Employee Edit rights will be the only one with authority to create or change a password for a specific user. To give users a defined number of attempted logins, enter a value in “Number of attempts before lockout”. Once a user hits this value, their login will be inactivated until an Admin or someone with Employee Edit rights manually changes their profile back to Active. Single sign on can also be turned on from here. If single sign on is turned on, if the username (including domain) of the computer log in matches one in the system, that person will automatically be logged in upon opening the program. For cloud systems, the sign-on must match your RDP username to be auto logged in using this feature.

To save the changes for both tabs on the screen, select the OK button. A confirmation message will appear, listing the items that you altered. Selecting “Yes” will save the changes and close the screen. Selecting “No” will reset the changes back to the original values. To leave the screen without changing any values, select the in the upper right corner of the screen.

MEMBERS/JOB SETUP (CONTRACTOR EDITION ONLY)

The third tab of Setup Options creates members that you would check out tools to, or it could be used



for jobs to which you check out tools.

The Show Members checkbox will display the Member button on the main toolbar if checked. If unchecked, the Member button will not be displayed.

You can rename Member to whatever is appropriate for your company, such as “Contractor”. There are 3 categories available to be used as needed. Categories are searchable fields on the Member screen.

There are 4 Additional Information fields that can be used as needed. These are also searchable fields on the Member screen.

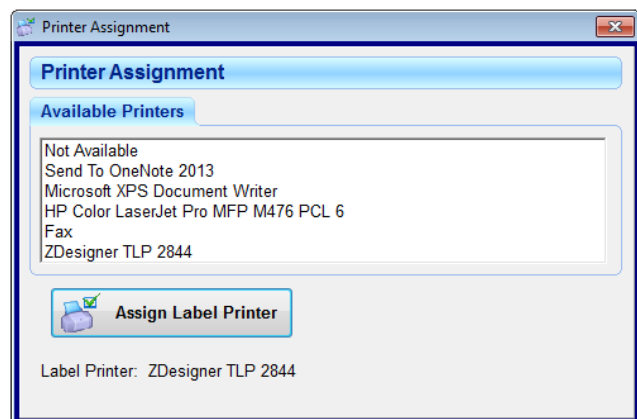
To save the changes on all 3 tabs of the screen, select the OK button. A confirmation message will appear, listing the items that you altered. Selecting “Yes” will save the changes and close the screen. Selecting “No” will reset the changes back to the original values.

To leave the screen without changing any values, select the in the upper right corner of the screen.

PRINTER ASSIGNMENT

The printer assignment process is used to set the printer the system will use for barcode labels. For self-hosted systems, the system will automatically use the PC’s default printer to print lists and reports. For cloud-hosted systems, the user can choose which printer is to be used for lists and reports. Select Printer Assignment from the File menu and the screen below will be displayed.

The Available Printers list will display all the printers that are on the Windows printer list.



To select the label printer, select the printer of choice and then click the Assign Label Printer button. The Label Printer label will indicate the printer you selected. Any labels printed by the system will be

directed to this printer. If you do not have a label printer, assign the default printer to act as the label printer.

TOOL CLASSIFICATIONS, TYPES, USER DEFINED FIELDS, AND MAINTENANCE

This function allows you to create classifications and types. Classifications (i.e. Power Hand Tools) and their (sub-) Types (i.e. Drills, Saws, etc.) are used to categorize tools within the system. On the menu bar select Support→Tool Support Administration. You can rename the Class and Types designators in the system's "Setup Options" function if desired. You can also add User Defined fields and Maintenance tasks to a specific type of tool. See Tool Support Administration in this Manual for more information.

CONDITIONS

This allows you to add any number of tool conditions that you desire (Excellent, Good, Poor, Needs Repair, etc.) This is a searchable field and can be valuable in locating equipment based upon their current condition. See the section on Condition Administration for more information.

FUNDING SOURCE AND ACCOUNTS

Funding Source and Accounts are standalone fields that can be set up to use as needed. These screens allow you to tie each tool to an account number or a funding source for added filtering. You can also rename the Funding Source and Account in the system's "Setup Options" function, if desired. See Funding Source Administration and Account Administration for more information.

MANUFACTURERS

The Manufacturer is a standalone field that can be set up to help filter on equipment by manufacturer. See Manufacturer Administration for more information.

FACILITIES

This function allows you to enter facilities, which are used to organize tool locations. On the menu bar select Support→ Facility Administration. See Facility Administration in this Manual for a detailed explanation.

LOCATIONS

This function allows the user to create locations where tools are stored or to which tools are checked out. Locations can be classified as "Storage," "Check Out/Usage," or "Transfer" locations and are always tied to facilities. Storage locations are typically where materials are centrally located until checkout. On the menu bar select Support→Location Administration. See Location Administration in this Manual for a detailed explanation.

EMPLOYEES

This function allows you to create users in TTS. A user may be an individual that will be using the TTS system, or a person to which tools may be checked out. You can also set TTS Access Rights for each user. On the menu bar select File→Employee Administration. See Employee Administration in this Manual for a detailed explanation. **NOTE: The user must be logged in as “Admin” to access this option.**

MEMBERS (CONTRACTOR EDITION ONLY)

This function allows you to create Members other than employees. A member is an individual to which tools may be checked out. You can set Member Categories in the Setup Options screen, and then add new members under the Members button.

LABEL DESIGN

The system allows the user to design labels for tools, locations, and employees. These labels typically have barcodes and can be used to audit, check in, and check out tools. Several sample label designs are included and can be modified. You must select a DEFAULT label design before printing is allowed. On the menu bar select Labels→Label Designer. See Label Designer in this Manual for a detailed explanation.

TOOLS AND MASTER/CATALOG

The tool administration screen allows for the creation of tools which are tracked by this system. On the main button bar select the Tools button. The Master/Catalog function is used to enter in common tools in a master/catalog data set that can be selected when adding tools – saving time and effort. See Tool Management in this Manual for a detailed explanation.

Once you have setup your initial data, you are ready to start using TTS. Check out tools to employees or locations and create reservations. You can also check tools back “in” to storage. Be diligent on how you use the system, and it will provide years of reliable tracking of all of your tools!

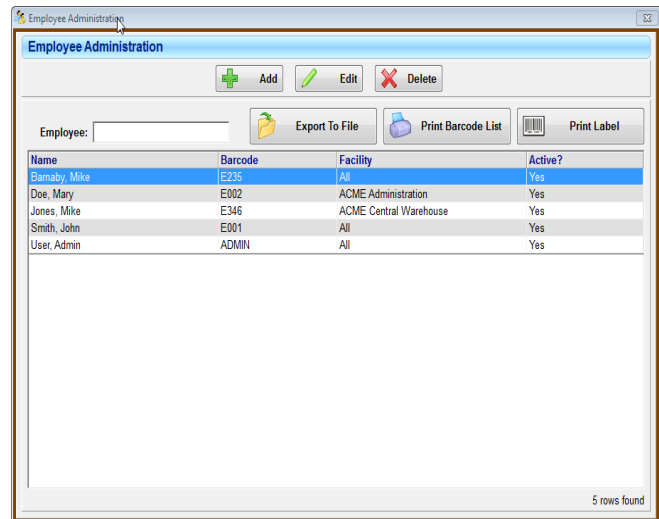
Backup your database daily! Cloud is backed up automatically by GigaTrak!

EMPLOYEE ADMINISTRATION

Employees are either people that have access to the TTS system to do transactions, view tools, run reports, etc, or people whom tools will be assigned. To manage employees, select Employee Administration under the File menu.

Upon initial setup, the only employee will be the Admin user. You may Add, Edit, or Delete employee information.

To Add a new employee, select the Add button. The form will change as indicated. The items in bold text are required for all employees.



The system will not allow editing of the last name, first name, middle initial, or user name for Admin User. The Admin password can be changed. If you are trying to login as the Admin but do not know the password, please call 262-657-5500 ext. 2 to get a daily password.

To delete an employee, select the employee and then select the delete button.

If an employee is assigned a tool or has an outstanding reservation or is involved in a history record, the system will not allow the employee to be deleted. Set the Status to inactive to prevent further use.

To print employee labels, select the employee(s) to be printed and then select the Print Label button. If a label printer has been selected and if a default employee label has been designated (see Label Designer in this manual), the label(s) will be printed.

For label printing, multiple employees may be selected. To select multiple employees, do one of the following:

- Drag the mouse over the employees desired while holding down the left mouse button.
- Select the first employee by left clicking with the mouse. Select the last employee in a range by holding down the Shift key and the left clicking on the last employee. All employees in between will be selected.
- Hold down the Control (Ctrl) key and select the employees you wish to print by left clicking on each one with the mouse.

EMPLOYEE INFORMATION

Employee Administration

Employee Administration

Save

Employee Info

First Name: Amanda

Last Name: Frank

Middle Initial:

Barcode: AFRANK

Log in Name:

Password: (Min. 5 characters)

Phone:

Alt. Phone:

E-mail:

Notes:

Status

Active

Inactive

Enter the appropriate employee information. A few fields have special requirements:

The barcode entry must be unique. A barcode for a tool, location, or employee cannot be the same. Keep the barcode as simple as possible, only using a short combination of capital letters and numbers. If you use the supplied barcode labels, the employee's barcode must match the label placed on their badge. Any employee barcode can be any set of unique characters. If you are making up an employee barcode, a first initial/last name is often used.

If the employee will be using the TTS system (PC or app), he/she will require a Log in Name and Password.

The Log in Name must be between 1 and 255 characters long. It must be unique; no two employees may have the same log in

name. Log in names are not case sensitive.

A password must be between 5 and 20 characters long. Passwords are not case sensitive. Password requirements can be set in the Setup Options.

EMPLOYEE ACCESS LEVELS

Once the employee information is entered, set the employee's access levels. The default access level is for no access to TTS.

Master/Catalog/Template – applies to activities associated with creating, viewing and editing master/catalog data.

Tools - applies to activities associated with creating, editing and viewing tool data.

Check In/Out – applies to activities associated with assigning tools to an individual, location, or container or returning tools to storage. Simple rights take away the users ability to lookup barcodes with the ellipses button on checkout as well as remove the F3 tab from the checkout screen

Transfer – applies to activities associated with transferring tools within facilities (not often used)

Reserve – applies to activities associated with creating, viewing and editing tool reservations

Employee Administration – applies to activities associated with managing employee information including adding new profiles, viewing profiles and editing profiles

Tool Status Administration – applies to activities associated with editing tool status from Active, Retired, Lost or Broken

Support Administration – applies to activities listed in the Support drop-down menu. User can either add/edit/delete, view or have no access rights to this menu

Maintenance Administration (Pro and Contractor Edition Only) – applies to activities associated with maintenance including adding in maintenance providers, creating maintenance repair types, performing maintenance transactions, and viewing maintenance history

Members Administration (Contractor Edition Only) – applies to activities associated with the Members icon including the ability to add, edit, delete, and view member information

Allow Clear Audit – Mark this option if the particular employee is allowed to clear audits on the Download/Audit icon

EMPLOYEE ASSIGNED FACILITY

The screenshot shows the 'Employee Administration' window. On the left is the 'Employee Info' section with fields for First Name, Last Name, Middle Initial, Barcode, Log in Name, Password, Phone, Alt. Phone, E-mail, and Notes. On the right is the 'Assigned Facility' section, which includes a 'Chk Facility' table with three rows: 'ACME Administration', 'ACME Central Warehouse', and 'ACME Warehouse 2', all of which are checked. Above this table is a checkbox for 'All Facility(s)'. Below the table is a 'Status' dropdown menu with 'Active' and 'Inactive' options. At the top of the window are 'Save' and 'Cancel' buttons.

If you have multiple Locations/Facilities, you can select which ones an employee can check out/check in tools from and view tools within. You can check “All Facility(s)” to allow access to them all, or you can select individual facilities.

Change the information or access levels as required and then select the Save button to save the changes, or the Cancel button to leave the Edit process without saving.

If the user logged into the system only has view rights to employees, the Add, Edit, and Delete buttons will not be available. Instead, a View button will be available to allow the user to look at but not change employee information.

OTHER FILE MENU FUNCTIONS

BACKUP/COMPACT DATABASE

If you have the Access version of TTS, this option is used to periodically repair, compact, and backup the TTS database. To determine if you have the Access version of TTS, go to the Help tab → About and the Database Type will say “Access”

It is possible that the Access database can get corrupted. Compacting the database may repair the damage. In addition, a previous compact operation will have created a backup of the database that can be used if the current database is corrupted beyond repair.

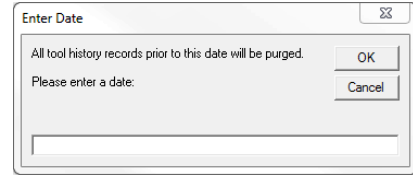
The screenshot shows a dialog box titled 'Backup / Compact Database'. It contains the following text: 'This procedure will repair many database errors as well as reduce overall database size by removing deleted and duplicate records. It will also create a backup copy of the current database in the 'dbbackup' folder. The system will keep the last 3 backup copies of the database. The oldest file will be deleted. To repair/compact the database, click the Compact Database button.' At the bottom of the dialog is a button labeled 'Compact Database'.

The system will retain three backup copies of the database in the dbbackup folder. Backing up frequently will minimize the loss of data if the current database is corrupted beyond repair.

MS Access does not automatically remove data that is deleted by the system. Compacting the database will remove data that has been deleted. This will reduce the size of the database file and improve performance.

To compact the database, select Compact Database under the File menu. Then select the Compact Database button.

The system will compact, repair, and backup the database and when complete, the Compact Database screen will disappear.

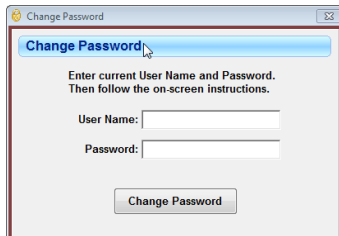


CHANGE PASSWORD

A user currently logged into TTS may change their password at any time. Select Change Password from the File menu and the screen at left appears.

Type in your current user name and password and then select the Change password button.

Passwords must be between 5 and 20 characters long.



Type in your new password and then select the Change Password button.

Type in your new password again. If the password matches the new password you typed earlier, the system will save the new password and the Change Password screen will disappear.

If the password does not match the password typed in earlier, the system will state the passwords do not match and ask if you wish to try again.

If you answer yes, the screen will be returned to the state above and you may try to type the second password again.

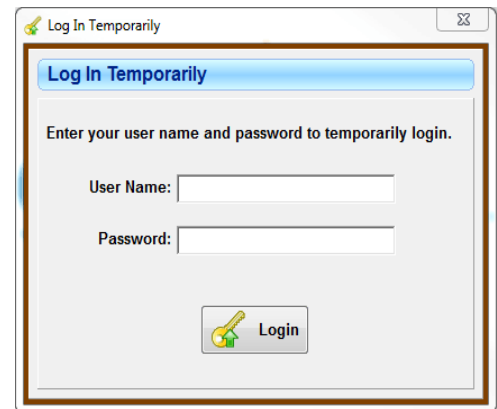
LOGIN TEMPORARILY

Log in temporarily is a function used in order to perform some function that the current user may not complete without the current user having to exit the program.

Select Log In Temporarily under the file menu. The screen at right will appear. Enter your user name and password, and then select the Log In button.

The banner on the main screen will turn red. As long as someone is temporarily logged into the system these conditions will remain.

When the user temporarily logged in logs out by selecting the Log Out button, the main screen will return to normal and the original user is the current user.

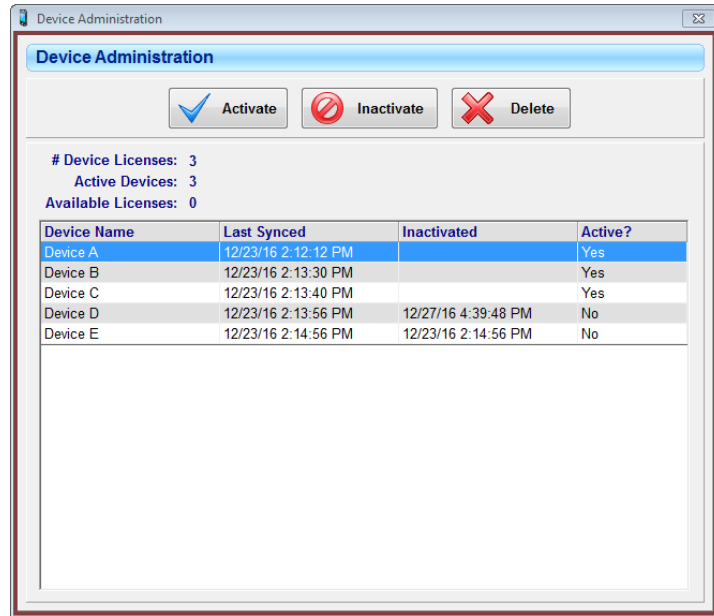


PURGE HISTORY

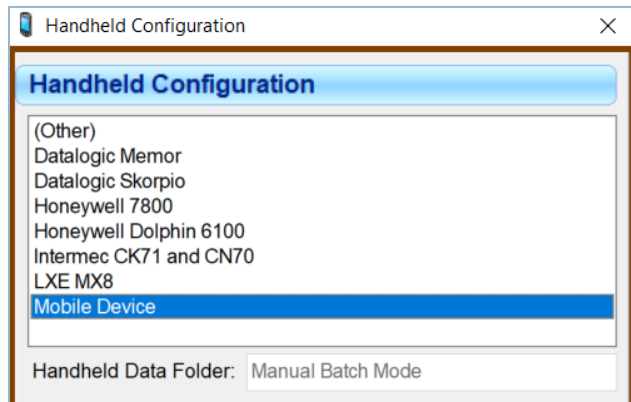
If you would like to purge all history before a certain date, you can enter a specific date and then click OK. **WARNING!!** Be very careful with this feature, when you click OK, all tool history records (F3 tab of Tools) will be purged for good. This cannot be undone unless you have the option to restore to a previously backed-up copy of the database.

DEVICE ADMINISTRATION

The Device Administration page allows you to select which devices have app licenses. This page can only be viewed when logged in as Admin. You may Activate, Inactivate or Delete Devices from the Device Administration page. To delete a device from the list, it will need to be inactivated first. Please note that once a device is inactivated you may not reactivate or delete it for another 24 hours. If an app user Registers their device without an Activation pin, they will need to be Activated on this screen in order to login and begin using the mobile app.



HANDHELD CONFIGURATION



The Handheld Configuration screen is used to select the handheld device. This version of TTS currently supports Windows Pocket PC and CE handhelds **which is no longer used**. The TTS system has been updated to now work with Android and iOS devices for mobility.

To view the Handheld Configuration screen, click the File menu item and select Handheld Configuration. Android devices should check "Mobile Device".

IMPORTS

Each import has specific instructions included on the import screen that delineates data formatting requirements along with any special instructions you may need. GigaTrak can also provide you with an Import Template for each of the items listed below. Columns with an asterisk on the template are required fields. Imports are available for the following:

Import Accounts: Allows the import of account data into the Account Administration table.

Import Employees: Allows the import of employee data into the Employee Administration table. The import even allows for the granting of specific access rights to the various functions in TTS.

Import Employees(Active Directory): Allows the import of employee data into the Employee Administration table, based on Active Directory. All imported employees are set to a specific access levels based on an already created employee. This is not a live intregation. In order to update Employees with your AD path, the user must press the 'Import' button to update the system.

Import Funding Sources: Allows the import of funding source data into the Funding Source Administration table.

Import Locations: Allows the import of location data into the Location Administration function. Careful – Locations are Facility Specific so the data must be accurate.

Import Maintenance History: Allows the import of past maintenance transactions to be imported per tool.

Import Maintenance Providers: Allows the import of Maintenance/Repair providers. A Maintenance/Repair provider is required when recording a Maintenance Transaction.

Import Manufacturers: Allows the import of funding source data into the Manufacturer Administration table.

Import Master/Catalog Items: Allows the import of master/catalog data from outside sources. Additional data may be desired but requires user editing after the import is completed.

Import Miles/Hours: Allows the import of a specific tools current mileage/hours (or if these fields are renamed in the setup options).

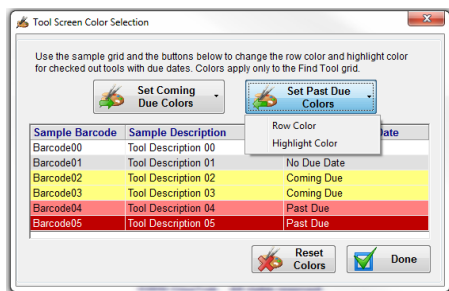
Import Tool Documents: Allows the import of an unlimited number of attachments to a specific tool. (Default tool images are imported in the Tools import per tool).

Import Tools: If you have spent years managing your inventory in an Excel formatted file, this can help you save time by importing your existing tool inventory quickly and safely. It is critical to ensure that the data is accurate and formatted properly to avoid bad data upon import!

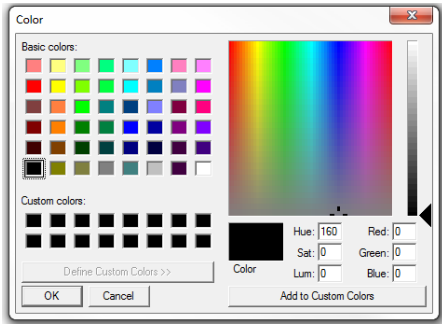
Import User Defined Data: Pro and Contractor Edition only. Allows the import of custom, user defined fields per tool. The tool must exist in the database prior to import.

Please contact GigaTrak directly to receive import templates and specific directions regarding imports.

TOOL SCREEN COLOR SELECTION



The Tool Screen Color Selection screen allows you to set the color of the row and the highlight for tools that are coming due or are past due. This will re-color tools on the Find Tools tab if the tool has assigned a due date on checkout. The tool will flag as 'Coming Due' if the tool's due date is today or later. The tool will flag as 'Past Due' if the due date is yesterday or earlier. NOTE: This does not apply to items that are binned.



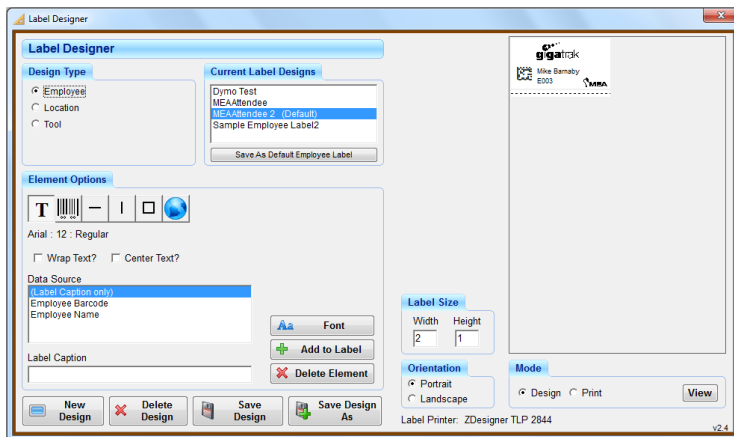
Set Coming Due Colors/Set Past Due Colors: Allows the options to select the color for the row and highlight color for the respective tool status.

Selecting to change the color of the row or highlight for the tool status will bring up the color picker where you can choose the color you wish to have for the row or highlight. The Tool and Screen Color Selection screen will then display a sample of you chosen colors.

LABEL MENU FUNCTIONS

LABEL DESIGNER

The Label Designer process is used to design labels for the various processes in the system that prints barcode labels.



The processes that will print labels are:

- Tools
- Employee Administration
- Location Administration

These processes can be selected in the Design Type section of the form, which is located in the upper left corner.

To design a label, first select the design type.

The Data Source List will contain the possible fields that may be included in the label. The list on the example contains the possible data sources for an Employee label.

The Current Label Designs list will contain any labels that have already been created for the design type. The list currently contains a sample employee label. When one of these labels is selected, the box on the right will display the label design, as indicated above for the sample employee label.

To create a new label, select the Design type and then select New Design button. Set the label size (Width and Height in inches). Set the label orientation (Portrait or Landscape). For Portrait, the height is vertical on the screen. For Landscape the Height is Horizontal on the screen.

There are 6 different elements that may be placed on the label. They are from left to right: text, barcode, horizontal line, vertical line, box, and a graphic.

ADDING A TEXT ELEMENT

Select the Text button in the Element Options panel. Select (Label Caption only) in the Data Source box, and type a label caption in the Label Caption textbox. You can select Wrap Text or Center. To set the font style and size, click the Font button. Click the Add to Label button. The text element will appear in the upper left corner of the label design. Drag it to the desired position on the label.

To edit the text caption or font after a text element has been placed in a label design, right click on the element and choose the option desired.

ADDING A DATABASE FIELD TEXT ELEMENT

In the Data Source box, select the desired database field. You can select Wrap Text or Center. To set the font style and size, click the Font button. Click the Add to Label button. A sample of the data will appear in the upper left corner of the label design. Drag it to the desired position on the label. When the label is printed, the actual data for that field will be printed on the label.

To edit the text caption or font after a database field text element has been placed in a label design, right click on the element and choose the option desired.

ADDING A BARCODE ELEMENT

Select the Barcode button in the Element Options panel. Select (Label Caption only) in the Data Source box, and type a label caption in the Label Caption textbox. You can select Center. Select the barcode font and size desired. Click the Add to Label button. The text will be added to the label in the barcode font. Drag it to the desired position on the label.

If a database field is needed as a barcode, select the field from the Data Source box, and add it to the label. When the label is printed, the actual data for that field will be printed on the label as a barcode.

ADDING A HORIZONTAL LINE ELEMENT

Select the Horizontal Line button in the Element Options panel. Click the Add to Label button. A horizontal line segment will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label. To change the size of the line, place the mouse cursor over the right end of the line. When the cursor changes to a double arrow, click and drag the endpoint to the desired length.

ADDING A VERTICAL LINE ELEMENT

Select the Vertical Line button in the Element Options panel. Click the Add to Label button. A vertical line segment will be added to the label design in the upper left-hand corner of the label. Drag it to the desired position on the label. To change the size of the line, place the mouse cursor over the bottom of the line. When the cursor changes to a double arrow, click and drag the endpoint to the desired length.

ADDING A BOX ELEMENT

Select the Box button in the Element Options panel. Click the Add to Label button. A box will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label. To

change the size of the box, place the mouse cursor over the lower right-hand corner of the box. When the cursor changes to a double arrow, click and drag the endpoint to the desired size.

ADDING A GRAPHIC ELEMENT

Select the Graphic button in the Element Options panel. Click the Find Graphic File button to find a file on your computer to place on the label. File types supported are bmp, gif, jpg, wmf, and ico. Click the Add to Label button. The graphic will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label.

Graphic elements are resizable. **Save the label design before attempting to resize a graphic element.** Right click on the graphic in the label and select Resize Graphic. A Resize Graphic box will appear above the Label Size box. Enter the desired Height and Width (in inches) and click the OK button. It may be possible to enter a size that causes the graphic to disappear from the label design. If this happens, select a different label design. When prompted to save changes, respond NO to the prompt. Then go back to the label design and try again.

DELETING A LABEL ELEMENT

Select the element to be deleted from the label design. Click the Delete Element button, or press the Delete key on the keyboard. Elements can also be deleted by right-clicking on the element and selecting Delete from the popup menu.

DELETING A LABEL DESIGN

To delete an entire label design, select the design from the Current Label Designs list. Click the Delete Design button at the bottom of the screen.

SAVE AN EXISTING DESIGN AS A NEW DESIGN

Time may be saved by copying an existing label design and modifying it. Select the design from the Current Label Designs list, and click the Save Design As button at the bottom of the screen. Enter a new design name and click the OK button. Design names must be unique.

VIEWING/PRINTING A LABEL

The work space on the right-hand side of the screen provides a feel for how your label will print. If you need to view exactly how your label will print, click on the View button with the Mode setting set to Design. An exact replica of the label will appear. To print the label on your label printer, change the Mode setting to Print, enter the number of labels you want to print and click the Print button.

SAVE AS DEFAULT

To save a label design as default for a specified process, select the Design Type (process), and select the label design from the Current Label Designs list. Then select the Save as Default button.

When a label is set as the default label, the word "Default" will appear after the label design.

LABEL QUICK START

To put the tool barcode on your label as a barcode:

- a. In “Element Options” select the barcode button.
- b. In the “Data Source” list box, select “Tool Barcode”.
- c. Click the “Add to Label” button to put it in your label design.
- d. Drag the element to the desired position.

To put the tool barcode on your label as a text field:

- 1) In “Element Options” select the “T” button.
- 2) In the “Data Source” list box, select “Tool Barcode”.
- 3) Set the desired Font options.
- 4) Click the “Add to Label” button to put it in your label design.
- 5) Drag the element to the desired position.

HELP MENU FUNCTIONS

CHECK FOR UPDATE (SELF-HOSTED ONLY)

After logging in, select Check for Update on the Help menu. Major updates may require you to contact GigaTrak and receive a special download. **Access to the Check for Update function is only available when the ADMIN login is used. You must have a current Support Agreement in place to download updates. Cloud contracts include all updates during your term.**

ABOUT

The about page displays a lot of important information about your system including your version number, database Type, Customer Identification and the number of each type of license you have.

CLOUD

CLOUD FILE BROWSER

The cloud menu will only appear for cloud-hosted systems. Click on Cloud→File Browser to open your cloud file storage. Each customer is provided with their own cloud storage for imports, exports, images, documents, etc. When importing or exporting data, you must go through the cloud file browser first. All exports (Excel, PDF, TXT) that are saved in the system will first be saved to the Cloud File Browser. To get that file locally, open the file browser and copy the file. Then, paste to your desktop. To import data, you must first copy your file to the cloud file browser. Then you will be able to grab that file for the import.

SUPPORT MENU FUNCTIONS

ACCOUNT ADMINISTRATION (OPTIONAL)

Account Administration is used to keep track of the account numbers that are used to purchase or assign tools to a specific account/department. Accounts will appear as a drop-down menu when adding in a new tool to assign it to one of the listed accounts. Accounts are optional and not required to use TTS.

To begin the process, select Account Administration from the Support menu.

To Add a new account, select the Add button. Enter the **Account Number** (required field) and a description (optional), then select the Save button.

To Edit an Account, select the Account of interest and then select the Edit button. Modify the information as desired. Select the Save button to save the Account changes.

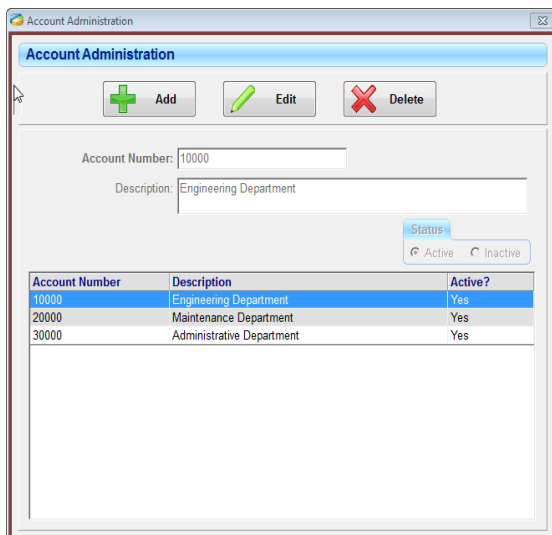
To Delete an Account, select the Account to be deleted and then select the Delete button. The system will check to see if the account is tied to a tool. If so, the system will not allow the Account to be deleted. You may inactivate the Account to prevent it from being assigned to a tool in the future if you desire. The label of "Account" can be renamed in the Setup Options. For example, a user may choose to rename Accounts to Departments so the title field will now say "Department Administration".

CONDITION ADMINISTRATION (OPTIONAL)

Tools may be assigned a Condition, which indicates the usefulness of the tool. To access this process, select Condition Administration under the Support menu.

Each Condition has a name and Description. In addition, a Condition may be designated as Active or Inactive. Usage of Conditions is optional.

Condition name may be up to 20 characters and is required. This name must be unique.

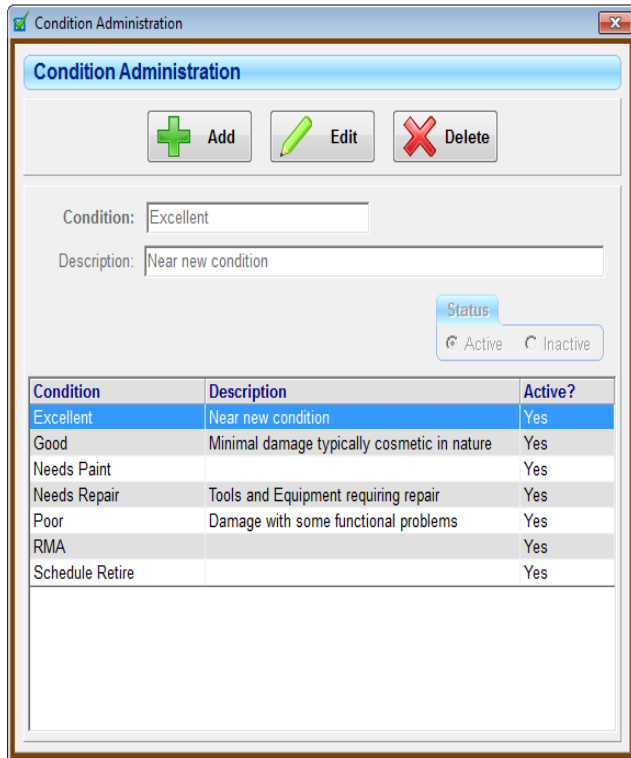


The screenshot shows a window titled "Account Administration" with a toolbar containing "Add", "Edit", and "Delete" buttons. Below the toolbar are input fields for "Account Number" (containing "10000") and "Description" (containing "Engineering Department"). A "Status" dropdown menu is set to "Active". Below these fields is a table with the following data:

Account Number	Description	Active?
10000	Engineering Department	Yes
20000	Maintenance Department	Yes
30000	Administrative Department	Yes

Description may be up to 80 characters long and is not required.

A Condition set as active may be assigned to a tool; a Condition set as inactive will not be available for assignment to a tool. Setting a condition as “inactive” minimizes clutter, but retains historical information tied to each condition.



To add a new Condition, select the “add” button, enter the new Condition (name) and Description, and click “save” button to save the new condition.

To edit an existing Condition, select the Condition to be edited and then select the Edit button. Modify the Condition (name), Description, or Status (Active vs. Inactive). Select the Save button to save the changed Condition.

To delete a Condition, select the Condition to be deleted and then select the Delete button. The system will check to see if the Condition is assigned to a tool. If so, the system will not allow the Condition to be deleted. You may inactivate the Condition to prevent it from being assigned to future tools if you desire.

FACILITY ADMINISTRATION (REQUIRED)

Facilities are the upper hierarchy of locations. In other words, locations are tied to a facility with a parent/child relationship. Due to this structure, at least one facility is required by the system.

To begin the process, select Facility Administration from the Support menu.

To Add a new facility, select the Add button.

Enter the facility information as desired:

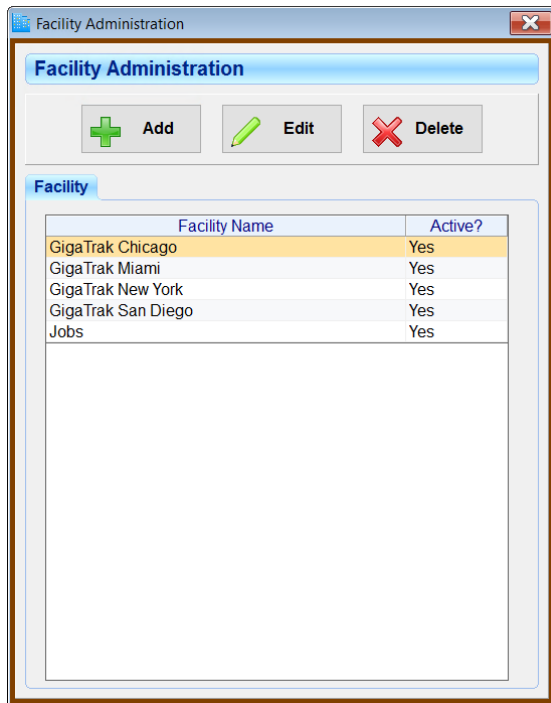
Facility Name: Up to 40 characters and is required.

Address: Up to 40 characters, but it is not required.

City: Up to 40 characters, but it is not required.

State: Up to 2 characters, but it is not required.

Zip Code: Up to 10 characters, but it is not required.



Notes: Up to 255 characters, but it is not required.

Select the “Save” button to save the new Facility.

To Edit a Facility, select the Facility of interest and then select the Edit button. Modify the information as desired. Select the Save button to save the Facility changes.

To Delete a Facility, select the Facility to be deleted and then select the Delete button. The system will check to see if a location is tied to the Facility. If so, the system will not allow the Facility to be deleted. You may inactivate the Facility to prevent a location from being assigned to it in the future if you desire.

(The title of “Facility” can be renamed in the back-end system Setup Options. However, it is important to remember that Facilities and Locations have a two-step hierarchy and renaming may make the system

confusing).

FUNDING SOURCE ADMINISTRATION (OPTIONAL)

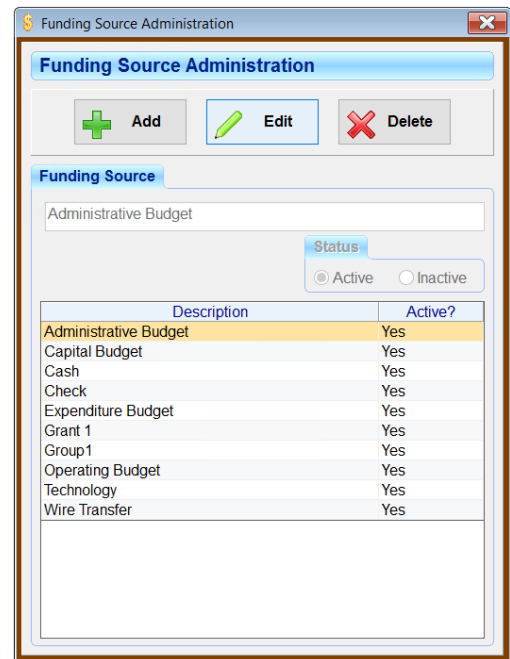
Funding Source Administration is used to keep track of the agency, budget, or source that provided funding for the tool.

To begin the process, select Funding Source Administration from the Support menu.

To Add a new Funding Source, select the Add button. Enter the **funding source name**, then select the Save button.

To Edit a Funding Source, select the Funding Source of interest and then select the Edit button. Modify the information as desired. Select the Save button to save the Funding Source changes. A drop-down menu of current active Funding Sources will be available to assign to a tool upon entry.

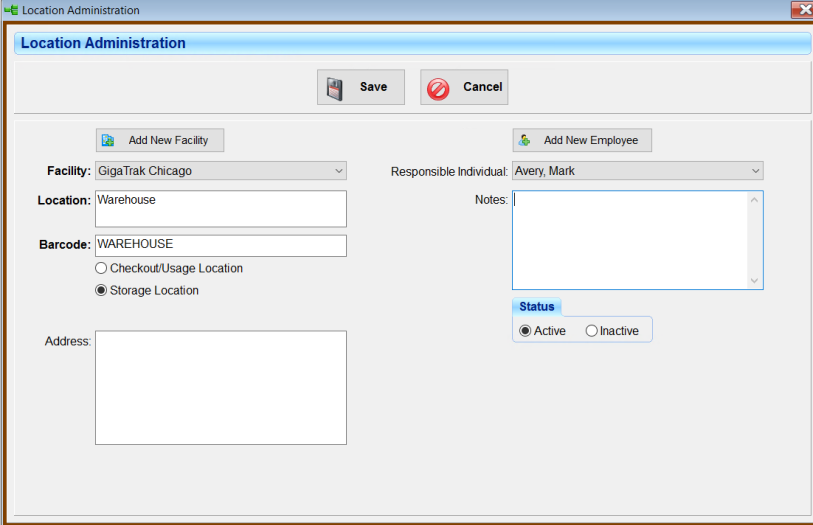
To Delete a Funding Source, select the Funding Source to be deleted and then select the Delete button. The system will check to see if the Funding Source is tied to a tool. If so, the system will not allow the Funding Source to be deleted. You may inactivate the Funding Source to prevent it from being assigned in the future if you desire. The name of “Funding Source” can be renamed in the system Setup Options.



LOCATION ADMINISTRATION (AT LEAST 1 STORAGE LOCATION REQUIRED)

Location Administration is used to manage the locations to which tools may be assigned. It displays all the locations that exist in the system that are tied to the facility selected. Select File-Location Administration.

To add a new Location, select the Facility to which it is to be added and then select the Add button.



The screenshot shows a window titled "Location Administration" with a "Save" button and a "Cancel" button. Below these are two buttons: "Add New Facility" and "Add New Employee". The form contains the following fields:

- Facility:** A dropdown menu with "GigaTrak Chicago" selected.
- Location:** A text input field containing "Warehouse".
- Barcode:** A text input field containing "WAREHOUSE".
- Address:** A large text input field.
- Responsible Individual:** A dropdown menu with "Avery, Mark" selected.
- Notes:** A text area.
- Status:** Radio buttons for "Active" (selected) and "Inactive".

Below the "Barcode" field are two radio buttons: "Checkout/Usage Location" and "Storage Location" (selected).

Enter the location information as desired:

Facility - defaults to the facility selected on the main form but may be changed with the drop-down menu.

Location - may be up to 50 characters and is required. Must be unique to each location and is required.

Barcode - may be up to 20 characters long and is required. A barcode for a tool, location, or employee cannot be the same.

Checkout/Usage Location - location that tools can be checked out to.

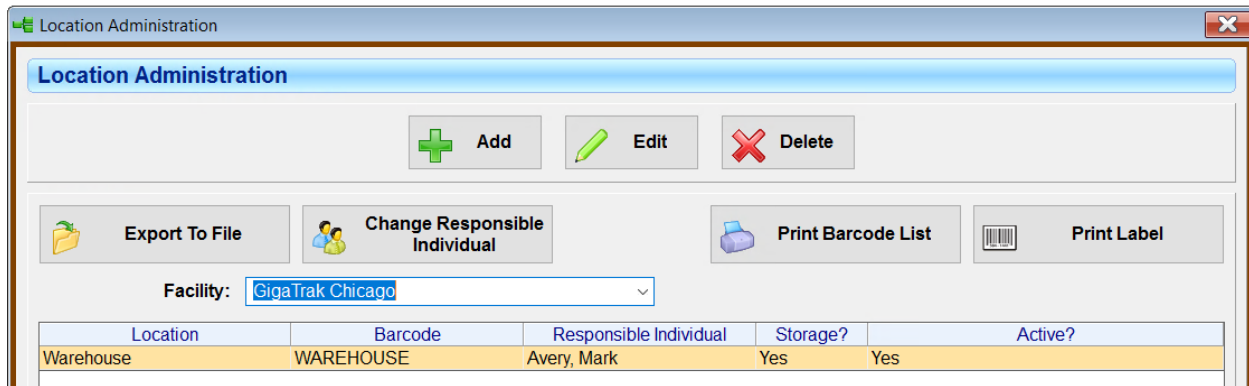
Storage Location - location used for storage rather than usage.

Transfer Location (Rarely Used) - location that tools transfer to within a facility

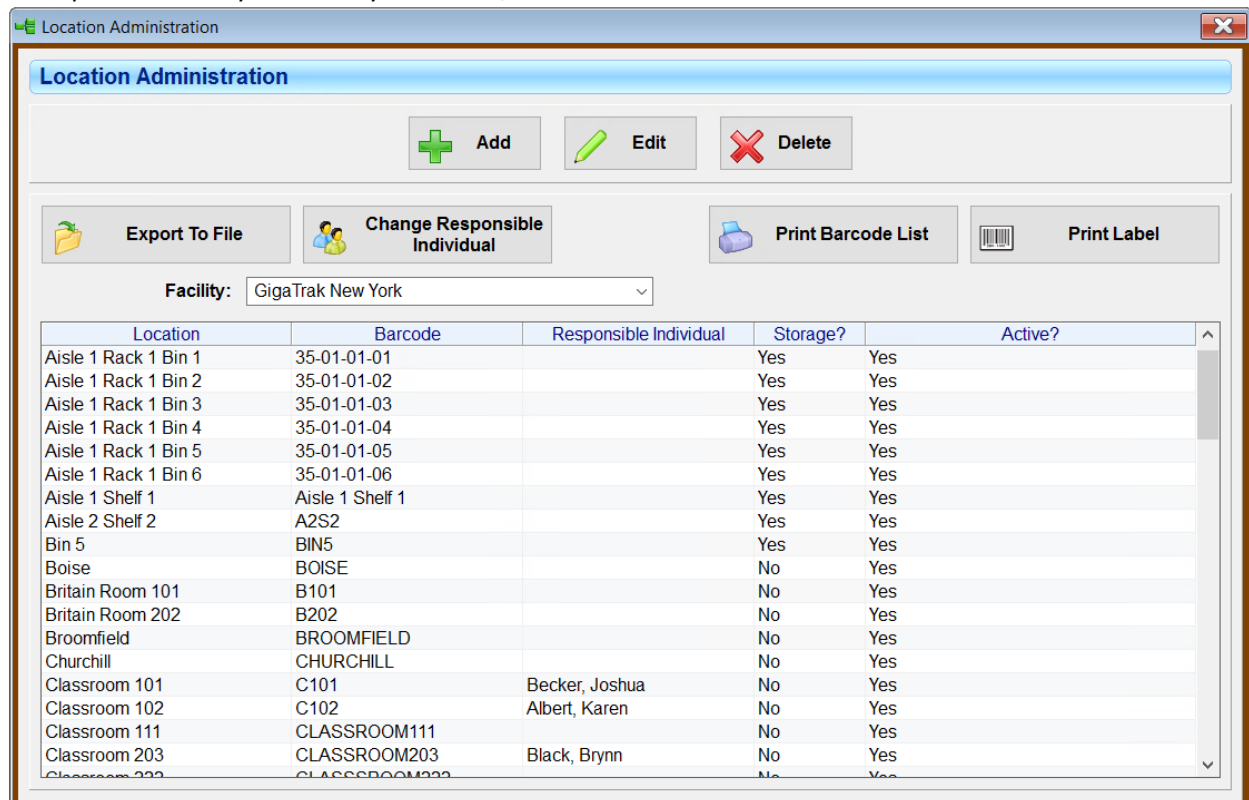
Responsible Individual – Optional. An employee that is responsible for the tools at the location. If the responsible individual is not in the system, you may go directly to the Employee Administration process by selecting the Add New Employee button.

Notes – Optional. May be up to 255 characters long

Example of a Facility with one Location,



Example of a Facility with many Locations,



To edit a Location, select the Facility containing the Location, select the Location of interest and then select the Edit button. Modify the information as desired. Select the Save button to save the Location changes.

To delete a Location, select the Location to be deleted and then select the Delete button. The system will check to see if a tool is tied to the location or the Location is being used in a history record. If so, the system will not allow the Location to be deleted. You may inactivate the Location to prevent a tool from being assigned to the Location in the future if you desire.

EXPORT LIST TO FILE

This button will export information for the displayed locations to a tab delimited text file.

CHANGE RESPONSIBLE INDIVIDUAL

Change Responsible Individual will change the responsible individual for all **selected** locations on the screen. Display and select the locations that you want to change. To select multiple locations, do one of the following:

- Drag the mouse over the locations desired while holding down the left mouse button.
- Select the first location by left clicking with the mouse. Select the last location in a range by holding down the Shift key and then left clicking on the last location. All locations in between will be selected.
- Hold down the Control (Ctrl) key and select the locations you wish to change by left clicking on each one with the mouse.

After the locations are selected, click the Change Responsible Individual button. A screen will appear where you can select a new Employee. Select the new Employee and click the OK button.

PRINT BARCODE LIST

Print Barcode List will print a list of the displayed location barcodes that can be used for scanning. When the Print Barcode List button is selected, a pop-up window will appear where you can set the barcode row height. This allows you to control the space between barcodes on the list. The minimum row height is 0.5 inch.

PRINT LOCATION LABEL

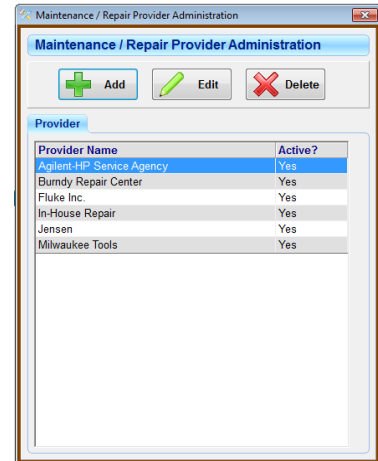
To print a Location label, select the location(s) to be printed and then select the Print Label button. If a label printer has been selected and if a default location label has been designated (see Label Designer in this manual), the label(s) will be printed.

For label printing, multiple locations may be selected. To select multiple locations, do one of the following:

- Drag the mouse over the locations desired while holding down the left mouse button.
- Select the first location by left clicking with the mouse. Select the last location in a range by holding down the Shift key and then left clicking on the last location. All locations in between will be selected.
- Hold down the Control (Ctrl) key and select the locations you wish to print by left clicking on each one with the mouse.

MAINTENANCE/REPAIR PROVIDER ADMINISTRATION (PRO AND CONTRACTOR EDITION ONLY)

The Maintenance / Repair Provider screen allows you to standardize the name of each provider who services your equipment. Select Maintenance/Repair Provider Administration on the Support menu. You can Add new provider names, edit the name, and delete those providers not already used for prior maintenance. You can also inactivate a provider who is no longer on your list of approved maintenance providers. At least one repair provider must be entered in order to perform maintenance on your tools.



TOOL SUPPORT ADMINISTRATION

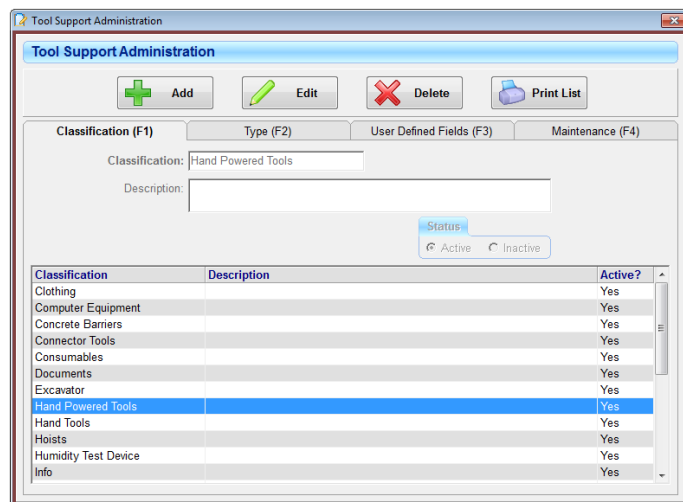
Support → Tool Support Administration is used to create Classifications and Types (aka Categories and Sub-Categories). Tool Support Administration screen has two (2) tabs: Classification and Type.

CLASSIFICATION (F1)

The first tab is Classification. Tools may be assigned a Classification (Category) to organize them in groups.

Each Classification has a **name** (Classification) and Description (optional). In addition, a Classification may be designated as Active or Inactive.

- Classification (name) may be up to 20 characters and is required. The Classification (name) must be unique (i.e., no other Classifications may have the same Classification (name)).
- Description may be up to 80 characters long and is not required.
- A Classification set as active may be assigned to a tool.
- A Classification set as inactive will not be available for assignment to a tool.



Setting a Classification to inactive reduces clutter in the system but retains historical information that is tied to that classification.

To add a new Classification, select the Add button.

1. Enter the new Classification (**name**) and Description (optional).
2. Select the Save button to save the new Classification.

To edit an existing Classification, select the Classification to be edited from the listing and then select the Edit button.

1. Modify the Classification (name), Description, or Status (Active vs. Inactive).
2. Select the Save button to save the changed Classification.

To delete a Classification, select the Classification to be deleted and then select the Delete button. The system will check to see if the Classification is assigned to a tool. If so, the system will not allow the Classification to be deleted. You may inactivate the Classification to prevent it from being assigned to future tools if you desire.

TYPE (F2)

On the second tab of Tool Support Administration is Type (Sub-Category), which is a subclass of Classification. Each Classification can have several Types. In addition to grouping tools under a Type, the Type will also set the default depreciation period for tools assigned to it.

Each Classification has one or more Types.

Each Type has a **name** (Type), optional Description, and optional Depreciation period in years.

A type may be designated as active or inactive. Set as inactive to reduce clutter & retain historical data tied to the type.

- Type (**name**) may be up to 20 characters and is required. The Type (name) must be unique (i.e., no other Types may have the same Type (name)).
- Description may be up to 80 characters long and is not required.
- Depreciation may be up to 255 years and is not required.
- Tools of this Type can be flagged as reservable by checking the checkbox. This will make them available when using the Reservation function.
- A Type set as active may be assigned to a tool.
- A Type set as inactive will not be available for assignment to a tool.

Type	Description	Dep.	Reservable	Active?
Circular Saw		5	Yes	Yes
Cordless Drill	Battery Powered	5	Yes	Yes
Electric Drill	Corded Electrical Drill	5	Yes	Yes
Hammer Drill		5	Yes	Yes
Jig Saw		5	No	Yes
Reciprocating Saw		5	Yes	Yes

To add a new Type, select the Add button.

1. Select the appropriate Classification for the new Type.
2. Enter the new Type (name), Description, and depreciation period.
3. Select if the type is reservable.
4. Select the Save button to save the new Type.

To edit an existing Type, select the Type to be edited and then select the Edit button.

1. Modify the Type (name), Description, Depreciation, or Status (Active vs. Inactive).
2. Select the Save button to save the changed Type.

To delete a type, select the Type to be deleted and then select the Delete button. The system will check to see if the Type is assigned to a tool. If so, the system will not allow the Type to be deleted. You may inactivate the type to prevent it from being assigned to future tools if you desire.

Items of a certain type can also be assigned default due dates. This means that any tool designed to that type will be assigned an automatic due date upon checkout. Default due dates can be set as

- End of current day at a specific time
- Specific date and/or time (example: end of semester; end of job)
- Number of days checked out (example: a tool can only be checked out for two days and then must be returned)

If you are not planning on using due dates OR a tool will have a specific due date that differs upon checkout, then this should be marked as 'None'.

Please note that in order for default due dates to work, the PC version must have the “Apply Type Due Dates” box checked on the checkout screen and the mobile app must have the toggle of “Apply Type Due Dates” turned on as well. If these are off, due dates will not be applied.

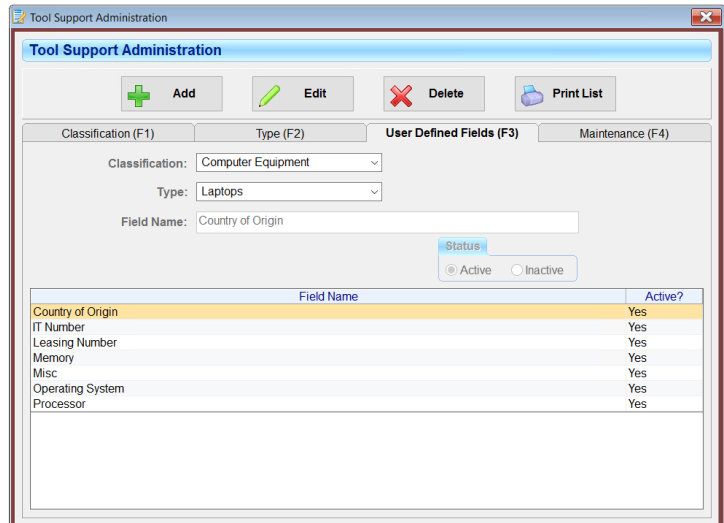
USER DEFINED FIELDS (F3) (PRO AND CONTRACTOR EDITION ONLY)

The third tab under Support → Tool Support Administration is User Defined Fields. User Defined Fields (or custom fields) are optional and can be added specific to a tool “Type”. When new tools are added to the system, the added fields are displayed in the Tool Information screen for user entry. New UDF’s cannot be added on the F2 screen of the tool and must be added under Tool Support Administration.

To add a new field, press “Add” and select the appropriate Classification and Type for the tool, a listing of the current User Defined Fields is displayed. Enter the name of the custom field and press “Save”. Each field has a name and may be designated as Active or Inactive.

Setting a User Defined Field to inactive does NOT remove the data already recorded for any tool of that type. It will not be displayed on the Tool Information screen. Returning the tool to active will restore prior data for each tool of that type.

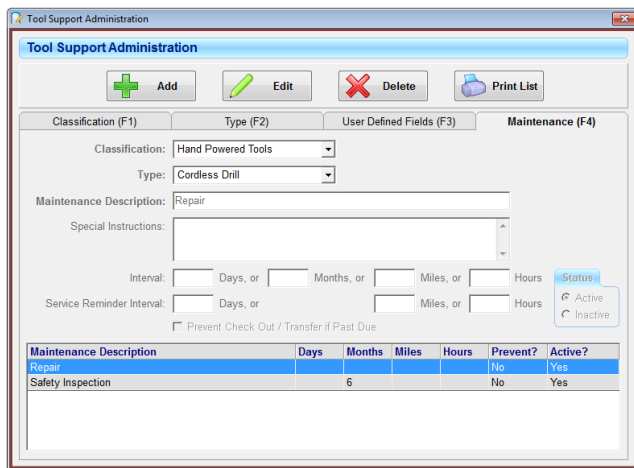
- The Field Name may be up to 50 characters and is required.
- A Field Name set as active will be assigned to each tool of that Type.
- A Field Name set as inactive will not be available.



MAINTENANCE (F4) (PRO AND CONTRACTOR EDITION ONLY)

The fourth tab of Tool Support Administration is Maintenance. All scheduled maintenance (maintenance that comes due on an interval) must first be setup on this tab. Each “Type” of equipment may be assigned a group of specific Maintenance items with a preset interval in days, months, operating hours, or mileage for required performance. In addition, a “Repair” maintenance item may automatically be inserted when a new “Type” is created. The auto-create “Repair” setting is set in the Setup Options screen.

Maintenance is tied to classes and types of tools. Each maintenance has a Description and Special Instructions. In addition, a maintenance item may be designated as Active or Inactive. Setting as inactive reduces clutter but retains historical information tied to the maintenance.



- The **Maintenance Description** may be up to 50 characters and is required. The Description must be unique (i.e., no other Description may be the same).
- Special Instructions may be up to 255 characters long and is not required.
- Interval is the length of time between performing the maintenance activity (i.e., do a Safety Inspection every 3 Months).
- Service Reminder Interval will determine if the maintenance item is displayed on the “Maintenance Due Report”, which can be displayed after log in. The setting for displaying the report is on the Setup Options screen.

- The checkbox “Prevent Check Out/Transfer if Past Due”, if checked, will not allow the tools of this type to be checked out or transferred when the maintenance item is past due.
- A Maintenance item set as active may be assigned to a tool of that type.
- A Maintenance item set as inactive will not be available.

To add a new Maintenance Item, select the Add button.

1. Enter the new Maintenance Description.
2. Enter any Special Instructions.
3. Select the Save button to save the new Maintenance Item.

To edit an existing Maintenance Item, select the Maintenance Item to be edited and then select the Edit button.

1. Modify the Maintenance Description, Special Instructions or Status (Active vs. Inactive).
2. Select the Save button to save the changed Maintenance Item.

To delete a Maintenance Item, select the Maintenance Item to be deleted and then select the Delete button. The system will check to see if the Maintenance Item is assigned to a tool. If so, the system will not allow the Maintenance Item to be deleted. You may inactivate the Maintenance Item to prevent it from being assigned to future tools if you desire.

SETUP MAINTENANCE HIERARCHY

Maintenance hierarchy must first be turned on in the System Setup Options (File-Setup Options-Application Settings-Enable Maintenance Hierarchy). Once turned on, it will appear on the F4 tab in Tool Support Administration.

Press “Add” to create a new Maintenance Type. Select the Classification and Type the Maintenance will go under. Enter the Maintenance description, any special instructions (optional), the interval and the reminder interval.

Maintenance Description	Days	Months	Miles	Hours	Prevent?	Active?	Letter	Number
Repair					No	Yes		
Oil Change		4			Yes	Yes	A	1
Tire Rotation		12			No	Yes	A	2
Mileage Check		6			No	Yes	A	3

To add a Maintenance Hierarchy, select a letter and hierarchy number for the Maintenance Type as well.

Any Maintenance Types with the same hierarchy letter will complete other maintenance types with the same level but a higher number. For example,

Oil Change – Letter A1

Tire Rotation – Letter A2

Mileage Check – Letter A3

Therefore, completing “Oil Change” will complete all higher levels as well and reset their interval.

If only A2 was completed, then A3 will complete as well but A1 will not.

B and C Maintenance letters will not complete when completing A. Only Maintenance Types in the same letter category will be completed (higher numbers only).

Maintenance Description	Days	Months	Miles	Hours	Prevent?	Active?	Letter	Number
Repair					No	Yes		
Oil Change		4			Yes	Yes	A	1
Tire Rotation		12			No	Yes	A	2
Mileage Check		6			No	Yes	A	3
Test B					No	Yes	B	1
Test B2					No	Yes	B	2
Test C					No	Yes	C	1

TOOL MASTER/CATALOG SCREEN

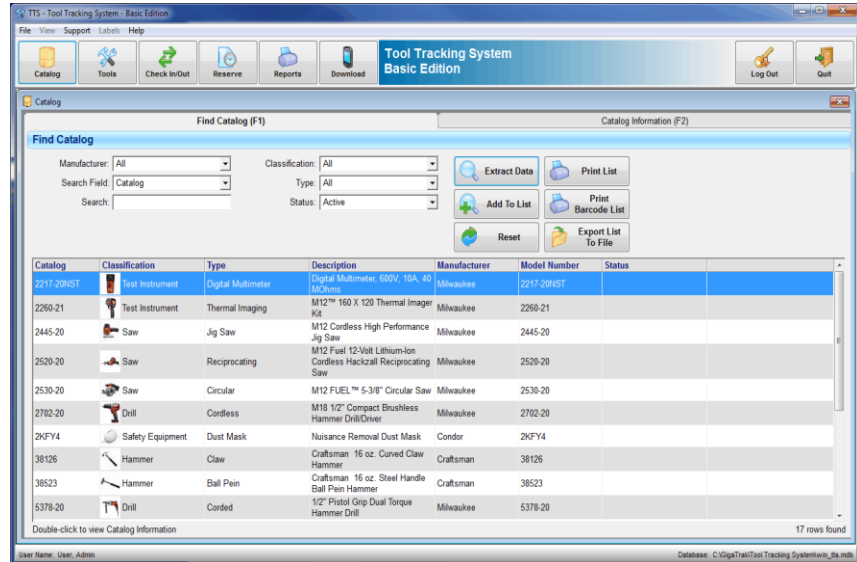
The Tool Master/Template/Catalog Screen is used to ensure that like items are entered into TTS the exact same way. This helps when searching for tools and items within your inventory. The goal is to establish a standardized way of entering your equipment that utilizes a “Master/Catalog Number” to track each tool. A Model Number can commonly be used as the Master/Catalog Number since it uniquely identifies the manufacturer and model being tracked. This master/catalog list can also be called a Part Master, Item Master, Lot Number, or other common term.

FIND MASTER/CATALOG (F1)

The Master is an optional features that allows you to create Master Templates for your tools. This can be commonly purchased tools or tools that you have a lot of. The purpose of the Master is to create data consistency or standardized data entry. For example, if you have two employees entering new tools, one may call an iPad something different than another person may call it. They may also categorize it differently. To avoid this from happening, customers choose to create Master Templates that are then used to add in real tools with standardized data. Click on the Master icon. Two tabs are displayed. There are no standard Masters in the system as each customer is different. The first is the “Find” tab allowing you to filter and view those items within the master/catalog by:

- Manufacturer
- Classification
- Type
- Status
- And a search by Master/Catalog Number, Description, or Model

Several key aspects are available on the form. As an example, selecting the Reset button will return all selections to All. In addition, the Master/Catalog list can be sorted by one of its columns by clicking on the heading of that column. A second click will reverse the sort order of the items in the listing.



SEARCH FIELD

Groups of master/catalog records can also be displayed by selecting Description in the Search Field dropdown list, typing words in the Search box, and then selecting the Extract Data button. For example, type the word “drill” into the box and click Extract Data. Only tools that have the word “drill” in the description will be displayed.

ADD TO LIST

The Add To List button can be used to build a custom list of Master Templates. When selected, it will appear to remain depressed. When in this mode, tools that are extracted will be added to the list of tools already shown on the screen, rather than clearing the screen first. You can continue to change the selection filters and extract the tools you need to build your list. The list can then be printed or exported. Clicking the Add To List button a second time will return the Extract Data function to its normal mode.

PRINT LIST

To print the Tools in the list, select the Print List button. . A report is displayed and the Tools displayed on the screen will be printed when Print is selected. You may also create a PDF or Email directly from the report.

PRINT BARCODE LIST

Print Barcode List will print a list of the displayed tool barcodes that can be used for scanning. The list will include the Master/Catalog Number, Master/Catalog Barcode, Description, Model, and Status. When the Print Barcode List button is selected, a pop-up window will appear where you can set the

barcode row height. This allows you to control the space between barcodes on the list. The minimum row height is 0.5 inch.

EXPORT LIST TO FILE

Export List To File will export information for the displayed tools to a tab delimited text file.

EXPORT GRID TO FILE

Export Grid To File will export only the information displayed in the grid at the same of exporting to a tab delimited text file.

MASTER/CATALOG INFORMATION (F2)

Any highlighted Master/Catalog tool can then be viewed in the Master/Catalog Information by double-clicking the record or selecting the tab.

The screenshot displays the 'Catalog Information (F2)' window. It features several input fields: 'Classification' set to 'Hand Powered Tools', 'Type' set to 'Cordless Drill', 'Description' containing 'Milwaukee M12 2450-22 cordless Impact Drivers', 'Catalog' set to '2450-22', 'Manufacturer' set to 'Milwaukee', and 'Model Number' set to 'M12 2450-22'. A 'Status' dropdown is set to 'Active'. On the right side, there are navigation buttons for 'Previous' and 'Next', and a vertical toolbar with 'Add', 'Edit', 'Delete', 'Copy', and 'Print Info' buttons. Below the main form, there are tabs for 'Primary Data', 'Purchase / Warranty', 'Images & Docs', and 'User Defined Data'. The 'Images & Docs' tab is active, showing a 'Tool Image' field with the file 'MILWAUKEE M12 2450-22 CORDLESS IMPACT DRIVER.JPG' and a list of 'Attached Images & Documents' including service parts lists and operator manuals. A large image of a red and black Milwaukee M12 cordless impact driver is displayed on the right side of the window.

With selected fields included, you are able to standardize the parameters for the Master/Catalog tool item being entered.

NOTE: If you edit or change any information in the Master/Catalog Information, you will be prompted as below:

Do you want to update all matching Tools' data with the Master/Catalog Information?

This could result in any custom changes to individual tools to be lost.

This allows any change to be updated in every record tied specifically to this Master/Catalog Record.

REMEMBER – You only need to add a specific model of tool ONCE in the master/catalog. The COPY function just saves you time to create a similar record but still make appropriate changes to differentiate the tools.

TOOLS SCREEN

The Tool management process is started by selecting the Tool icon on the main toolbar, which displays the screen below. The title fields on the table can be resized and rearranged as you like by dragging and dropping them to their desired position. The program will remember your changes to the size and arrangement locally. So, the next time someone runs the program on that machine the sizing and arrangement will be just as it was left by the last user.

The Tool management form is composed of four tabs:

- Find Tool
- Tool Information
- Tool History
- Tool Maintenance (Pro and CE)

FIND TOOL (F1)

The first tab (F1 Find Tool) is mainly used to view tools, print a list of tools, and print tool labels. The list of Tools on the screen is controlled by the multiple selections on the upper part of the form. These selections are:

- Facility
- Location
- Funding Source
- Account
- Manufacturer
- Condition
- Search (by barcode, asset number, description, in service date, model number, notes, and serial number, misc., due date, purchase order)
- Master/Catalog Number
- Classification
- Type
- Status
- Other Search (Binned Tools, Consumable Only, Non-Consumable Only, Assigned to Employee Barcode, Assigned to Location Barcode, and Assigned to Container Barcode, Tools Checked In, Tools Checked Out, Reservable Tools, Supplier Look-Up, Maintenance Requests)

Barcode	Description	Storage Location	Serial Number	Manufacturer	Model Number	Funding source	Condition	Departments	In Service Date	Asset
T001	iPad Air 2	Warehouse (GigaTrak Chicago)	4054123	Apple	A5006	Administrative Budget	Good	4000 - Maintenance	5/31/2018	1261
T002	iPad Air 2	Warehouse (GigaTrak Chicago)	6543211321	Apple	A5006	Administrative Budget	Excellent	4000 - Maintenance	5/31/2018	653972
T003	Memor 10	Warehouse (GigaTrak Chicago)	654321321	Datalogic	944350009	Administrative Budget	Excellent	4000 - Maintenance	5/31/2018	8004375 000410
T004	Memor 10	Warehouse (GigaTrak Chicago)	445612310	Datalogic	944350009	Administrative Budget	Excellent	4000 - Maintenance	5/31/2018	638527
T005	Memor 10	Warehouse (GigaTrak Chicago)	9641231	Datalogic	944350009	Administrative Budget	Great	4000 - Maintenance	5/31/2018	8004375 000410
T006	Milwaukee Cordless Drill	Warehouse (GigaTrak Chicago)	458EE245	Milwaukee	2006-22CT	Expenditure Budget	Excellent	4000 - Maintenance	11/17/2016	005430C 000000K
T007	Milwaukee Cordless Drill	Warehouse (GigaTrak Chicago)	98715F54	Milwaukee	2006-22CT	Expenditure Budget	Good	4000 - Maintenance	11/17/2016	406
T008	Milwaukee Cordless Drill	Warehouse (GigaTrak Chicago)	9832112D	Milwaukee	2006-22CT	Expenditure Budget	Excellent	4000 - Maintenance	11/17/2016	1104

A listing of all active tools will appear if the “Auto Populate Tool Find Tab” option is turned on in the Setup Options. If this option is not turned on, the grid will be blank and the user will be forced to use the filters to search by specifics. Once they hit “Extract Data” a listing of tools that match the filters will appear. When Resetting, the grid will be blank again.

All of these selections are administered under the support menu of the main form. Each is tied to a tool in the Tool Information tab of this form. Select the parameters of choice and then select the Extract Data button to change the tool display to match the filters.

Several key aspects are available on the form. As an example, selecting the Reset button will return all selections to All. In addition, the Tool list can be sorted by one of its columns by clicking on the heading of that column. A second click will reverse the sort order of the items in the listing.

SHOW THUMBNAIL IMAGES

If an image is assigned to a tool, a thumbnail picture will be displayed in the Description column of the grid. The thumbnail display can be turned on or off by right-clicking in the grid and selecting “Show Thumbnail Images” in the popup menu.



Description	Asset Number
 Milwaukee 1-2in Magnum Drill 0-850RPM	WE00001
 Milwaukee Drill 0-850F	
 Milwaukee 11amp Sawzall	WE00004

NOTE: Some images may be incompatible with this application. This can cause errors when data is extracted on the Find Tool tab. If errors occur, find a tool that does not have an image (or add a new tool without an image) and display it in the grid. Right-click the item in the grid, and uncheck Thumbnail Images.

A larger view of the image can be displayed by selecting “View Image” from the popup menu.

SEARCH FIELD

Groups of tools can also be displayed by typing words in the Search box, and then selecting the Extract Data button. For example, select Description in the Search Field dropdown list, type the word ‘Chair’ into the Search box and click Extract Data. Only tools that have the word chair in the description will be displayed. If a Location is also selected, only tools that are located at that location and have the word chair in the description will be displayed.

To find a specific Tool by its barcode:

- Select Barcode on the Search Field drop-down list
- Select the Barcode text box
- Type in the barcode and select the Enter key on the keyboard, or scan the barcode with a wedge type barcode scanner attached to the PC
- If the barcode matches that of a tool, the Tool will appear on the list

ADD TO LIST

The Add To List button can be used to build a custom list of tools. When selected, it will appear to remain depressed. When in this mode, tools that are extracted will be added to the list of tools already shown on the screen, rather than clearing the screen first. You can continue to change the selection

filters and extract the tools you need to build your list. The list can then be printed or exported. Clicking the Add To List button a second time will return the Extract Data function to its normal mode.

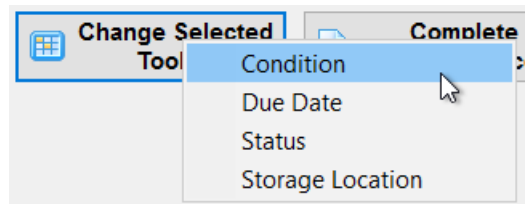
CHANGE SELECTED TOOLS(S)

The Change Selected Tool(s) function is used to change the Status of a group of tools all at once. First, use the filters to display and select the tools that you want to change. To select multiple Tools, do one of the following:

- Drag the mouse over the Tools desired while holding down the left mouse button.
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and then left clicking on the last Tool. All Tools in between will be selected.
- Hold down the Control (Ctrl) key and select the Tools you wish to change by left clicking on each one with the mouse.

After the tools are selected, click the “Change Selected Tool(s)” button. A pop-up will appear and you can select the option you would like to change. Options including changing the

- Status
- Condition
- Due Date (Tool must be checked out)
- Storage Location



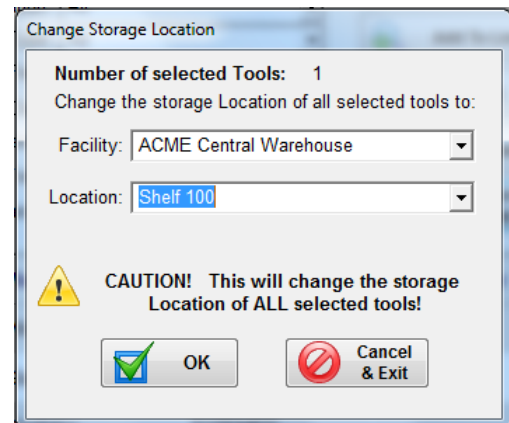
CHANGE STORAGE LOCATION

The Change Storage Location function is used to change the storage location of a group of tools all at once. Display and select the tools that you want to change.

To select multiple Tools, do one of the following:

- Drag the mouse over the Tools desired while holding down the left mouse button.
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and then left clicking on the last Tool. All Tools in between will be selected.
- Hold down the Control (Ctrl) key and select the Tools you wish to change by left clicking on each one with the mouse.

After the tools are selected, click the “Change Storage Location” button. A screen will appear where you can select a new Facility and Storage Location. Select the new Facility and Storage Location and click the OK button.



CHANGE CONDITION

To change the Condition of a group of tools all at once, first sort and display the tools you want in the grid.

- Drag the mouse over the Tools desired while holding down the left mouse button.

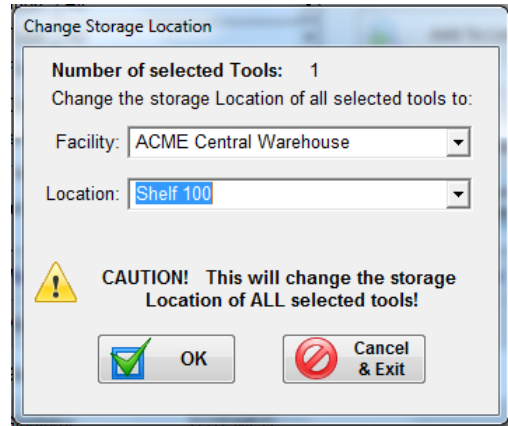
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and then left clicking on the last Tool. All Tools in between will be selected.
- Hold down the Control (Ctrl) key and select the Tools you wish to change by left clicking on each one with the mouse.

After the tools are selected, click “Change Condition”. A screen will appear where you can select a new Condition for all tools highlighted. Select the new Condition and Press the OK button.

CHANGE STATUS

The Change Status function is used to change the Status of a group of tools all at once. Display and select the tools that you want to change. To select multiple Tools, do one of the following:

- Drag the mouse over the Tools desired while holding down the left mouse button.
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and then left clicking on the last Tool. All Tools in between will be selected.
- Hold down the Control (Ctrl) key and select the Tools you wish to change by left clicking on each one with the mouse.

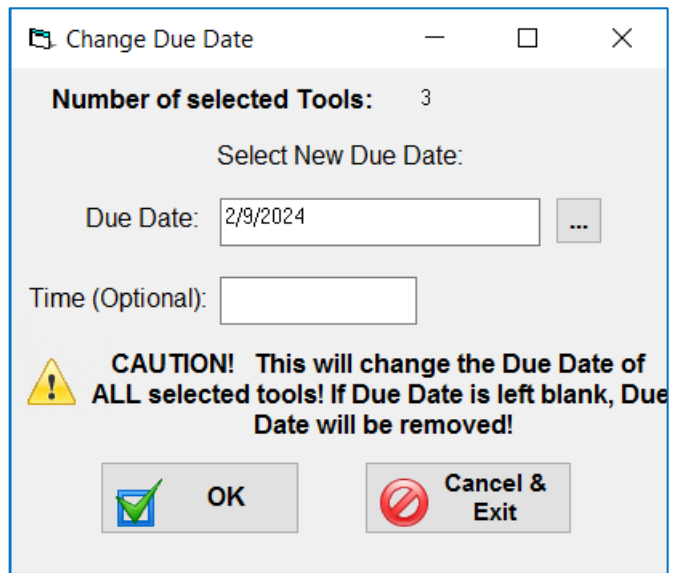


After the tools are selected, click the “Change Status” button. A screen will appear where you can select a new Status of “Active, Retired, Lost, Broken”. Select the new Status and click the OK button.

CHANGE DUE DATE

The Change Due Date function is used to change the due date of a group of tools that are currently checked out. Display and select the tools that you want to change. To select multiple Tools, do one of the following:

- Drag the mouse over the Tools desired while holding down the left mouse button.
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and then left clicking on the last Tool. All Tools in between will be selected.
- Hold down the Control (Ctrl) key and select the Tools you wish to change by left clicking on each one with the mouse.



After the tools are selected, click the “Change Due Date” button. A screen will appear where you can select a new/updated Due Date with an optional time to be returned. Click the “Ok” button to proceed or “Cancel & Exit” to reset with no changes.

PRINT LIST

To print the Tools that are currently displayed in the grid, select the Print List button. A report is displayed and the Tools displayed on the screen will be printed when Print is selected. You may also create a PDF or Email directly from the report.

PRINT BARCODE LIST

Print Barcode List will print a list of the displayed tool in the grid with a barcode that can be used for scanning. The list will include the tool descriptions, model numbers, and serial numbers. When the Print Barcode List button is selected, a pop-up window will appear where you can set the barcode row height. This allows you to control the space between barcodes on the list. The minimum row height is 0.5 inch. Increasing the row height will space out the tool barcodes which makes scanning an item easier.

PRINT TOOL LABEL

To print tool labels:

- Select one or more Tools in the list,
- Select the Print Label button.

For label printing, multiple Tools may be selected. To select multiple Tools, do one of the following:

- Drag the mouse over the Tools desired while holding down the left mouse button.
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and then left clicking on the last Tool. All Tools in between will be selected.
- Hold down the Control (Ctrl) key and select the Tools you wish to print by left clicking on each one with the mouse.

COMPLETE MAINTENANCE

A group of the same Type of tools can be completed for maintenance at a single time. For example, if I have 20 trucks that had an oil change, I can complete all 20 at once without having to go to each one individually and perform maintenance. This can only be completed on the same Type of tools with the same Maintenance assigned to each one. First, sort and highlight the tools in the grid.

To select multiple Tools, do one of the following:

- Drag the mouse over the Tools desired while holding down the left mouse button.
- Select the first Tool by left clicking with the mouse. Select the last Tool in a range by holding down the Shift key and then left clicking on the last Tool. All Tools in between will be selected.
- Hold down the Control (Ctrl) key and select the Tools you wish to change by left clicking on each one with the mouse.

The screenshot shows a dialog box titled "Complete Bulk Maintenance". At the top, it displays "Number of selected Tools: 25". Below this are two text input fields: "Classification: Computer Equipment" and "Type: Laptops". The "Start Date" is set to "03/04/2022" with a calendar icon. The "Type" is set to "Repair" with a dropdown arrow. The "Provider" is set to "All Pro Agency" with a dropdown arrow. There is a "Cost:" label followed by an empty text box and a "Set as Default" checkbox. The "Completed Date" is set to "03/04/2022" with a calendar icon. The "Next Due:" label is followed by an empty text box and a note "(leave blank to auto-calc)". A yellow warning triangle icon is next to the text "CAUTION! This will complete Maintenance for ALL selected tools!". At the bottom, there are two buttons: "OK" with a checkmark icon and "Cancel" with a red X icon.

Once the tools are listed, press the “Complete Maintenance” button. A pop-up screen will appear. The quantity of tools being completed in the bulk maintenance will be listed along with the Class/Type. Choose the start date, type, and provider and completed date. Cost is optional. Press “OK” or “Cancel” to clear the screen.

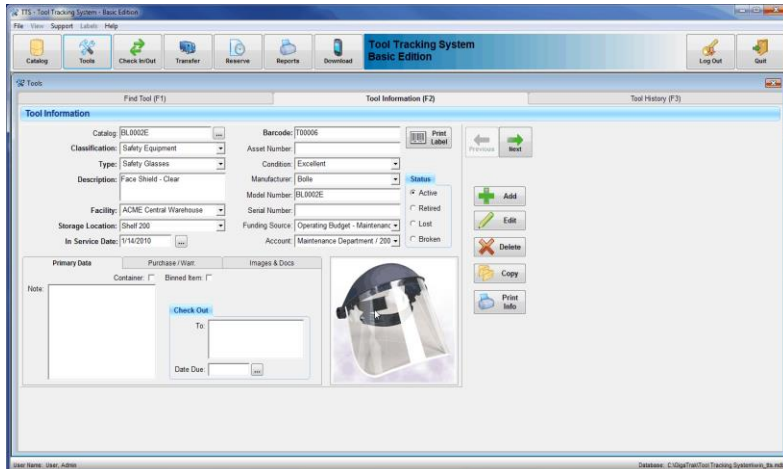
EXPORT LIST TO FILE

Export List to File will export information for the displayed tools to a tab delimited text file or an xls file.

TOOL INFORMATION (F2)

Selecting a tool and then selecting the Tool Information tab, or double-clicking on a tool, will bring up the Tool Information screen below.

Tool information with bold text is required. Many of the fields listed below are included in the sub-tabbed section in the lower portion of the form. The available tool information is:



- Master/Catalog Number is a selection to pull down general Tool information from the Master/Catalog screen
- Classification is a method of grouping Tools
- Type is a subset of Classification and a second method of grouping Tools
- Description is up to 80 characters describing the Tool
- Facility is the building in which the Tool is located
- Storage Location is the default

storage location for the Tool

- In Service Date is the date the tool was put into service (defaults to current date)
- Barcode is the barcode that identifies the Tool. You must enter the first tool's barcode number manually in a format that all barcodes will use (i.e. A00001). The system will then automatically increment the numerical portion of the barcode number one at a time. If you are using pre-printed barcodes, enter the number seen on the barcode.
- Asset Number is the tools asset number, up to 30 characters
- Condition is the physical condition of the Tool. Condition does not apply to binned items.
- Manufacturer is the manufacturer of the tool (data entered on the Manufacturer Administration screen)
- Model is the model number of the Tool
- Serial Number is the Serial Number of the Tool
- Funding Source is the agency that provided the Tool (User Definable Field)
- Account is the account number used to purchase the Tool
- Status. An Active tool may be checked out, A Retired Tool may not be checked out.

Only **bolded** fields are required for each tool entry.

PRIMARY DATA SUB-TAB

- Note is up to 255 characters of information about the Tool
- Container allows other tools to be checked out to the container itself (i.e. tool box, gangbox, trailer)
- Binned Item is used for small items that cannot be individually bar coded. If the Binned Item checkbox is checked, an option will appear to mark the tool as a Consumable. Boxes will also appear to enter a Storage Bin Quantity and a Reorder Point.
- Check Out shows who or where the tool is checked out to (employee or location)
- Due Date is the date the Tool is due to be checked in

PURCHASE / WARR. SUB-TAB

- Purchased From allows entry of general supplier information

- Warranty Expiration Date tracks when a warranty period expires
- PO Num allows the entry of a Purchase Order related to the tool.
 - NOTE: PO Number will be required if it was marked required for adding or editing in the Setup Options menu.
- Depreciation period in years (does not apply to bin items)
 - NOTE: fields relating to Depreciation will not be visible unless the “Show Depreciation” checkbox is checked on the Setup Options screen.
- Depreciation Type. The system will calculate depreciation based on five methods: Standard Straight Line, MACRS Half-Year, MACRS Mid-Quarter, MACRS Double Declining Half Year, and MACRS Double Declining Mid Quarter
 - MACRS means Modified Accelerated Cost Recovery System
- Original Value is the cost basis for depreciating the Tool
- Salvage Value is the remaining value of the tool after it has been fully depreciated
- Current Value is the current depreciated value of the Tool (calculated)
- Date for Current Value is the date used to calculate the current value
- Miscellaneous is a user definable field that can be used as desired

IMAGES & DOCS SUB-TAB

Tool Image is the path to a file that contains a picture of the tool. If the image information is entered and a file is at the proper location, the picture will be displayed in the area to the right of the sub-tab section. Double clicking on the image will display a full sized image of the picture. In addition, linked documents, PDF, URLs, and other related files can be assigned to the Tool.

USER DEFINED DATA SUB-TAB (PRO AND CONTRACTOR EDITION ONLY)

User Defined Fields stores additional information specific to the type of Tool. User Defined Field names are first created under Support-Tool Support Administration – F3 tab.

If a tool with user defined data is edited and the Type is changed, it is possible that duplicate user defined fields will appear. This can happen if the new Type has the same user defined field names as the previous Type. The new field will be blank and the old field will have data.

Field Name	Data	Date Entered
Chuck Type:	1/4" Hex Speed Chuck	8/7/2014
Torque:	850 in-lbs	8/7/2014
Voltage:	12vdc Lithium	8/7/2014

To correct this, Edit the tool and enter the user defined data into the blank field. Then blank out the data in the old field. When the tool is Saved, a message will appear to indicate that user defined fields were found that do not belong to the selected Class and Type. It will ask if you want to delete the fields. Respond “Yes” to the prompt.

MILES / HOURS SUB-TAB (PRO AND CONTRACTOR EDITION ONLY)

Miles and Hours can be entered along with associated dates. This is used in the Tool Maintenance section.

BINNED AND CONSUMABLE ITEMS

Binned and Consumable items *must be selected at the time the tool is entered via the Add button*. Due to the different methods that bin and consumable data is tracked in the system, **the Bin selection cannot be changed with the Edit function**.

Binned items are small items that would not be individually bar coded, such as screwdrivers. They would be located in a common bin with a single barcode. When they are checked out, they are expected to be returned.

Consumable items are a subset of binned items. Consumables are items that are checked out but **not** expected to be returned, such as gloves.

Binned and Consumable items have a Reorder Point. This is the minimum quantity that you want to keep in inventory. When the Storage Bin Quantity reaches the Reorder Point, the item will appear on the “Bin Tools Below Reorder Point” report.

ADDING A NEW TOOL

To add a new Tool, select the Add button. All information is cleared and the Save and Cancel buttons appear. You can pre-enter in information by selecting a Master/Catalog Number or enter in all information without referencing the Master/Catalog Number.

If turned on in System Setup Options, the system will automatically generate a unique barcode for the tool if the barcode field is blank. If a specific barcode number is needed, just enter the number manually or scan with an attached scanner. Each barcode number must be unique. Select or enter the required information (**bold fields**). Enter the non-required information if desired. Save the Tool by selecting the Save button. The screen will return to the original state with the new Tool information.

Cancel the process without saving by selecting the Cancel button. The screen will return to the original state with the information displayed that was present prior to selecting the Add button.

Additional drop-down menus can be added while on the F2 tab by clicking on “New” and typing over the word. Upon saving the record, the new field will be added to the drop-down menu moving forward. This works for all drop-down menus except Facility which must first be added in the Support tab.

ADDING IN A NEW BINNED ITEM

To add a new Binned Tool, select the Add button. Continue to fill out all required bolded fields like you would with a regular tool. BEFORE pressing Save, you must check the box marked “Binned Item” and choose whether it is a Non-Consumable Item (you expect to get it back) or a Consumable Item (you do not expect to get it back). Enter current Storage Quantity and Reorder point if necessary. Press Save.

Binned items are always tracked in quantities instead of individual meaning a group of items would share the same barcode. When this barcode is scanned for checkout, the system will ask the user how many they are taking.

ADDING IN A CONTAINER

A Container allows individually barcoded tools to be checked out to the container itself (i.e. tool box, gangbox, trailer) and moved around as a whole. To setup a new Container, click ADD on the F2 tab. Continue to fill out all required bolded fields for the Container as you would a regular tool. BEFORE pressing Save, you MUST mark the box labeled "Container" under the Primary Data Tab. Once the box is checked, press Save.

EDITING AN EXISTING TOOL

To edit an existing Tool, select the Edit button. The Save and Cancel buttons appear.

Change the Tool's information as desired. Information with bold labels is required. Save the Tool by selecting the Save button. The screen will return to the original state with the changed Tool information.

Cancel the process without saving by selecting the Cancel button. The screen will return to the original state with the Tool information unchanged.

COPYING AN EXISTING TOOL'S INFORMATION TO A NEW TOOL

This is one of the most helpful features when multiples of the same type of tool needs to be entered. To Copy an existing Tool's information to use in creating a new tool, select the Copy button. The majority of data is copied to a new record. The exception is that the barcode number, serial number and checkout information is cleared and the Save and Cancel buttons appear.

The system will automatically generate a unique barcode for the tool. If this barcode is unacceptable, it can be typed over by the user. The barcode entry must be unique. A barcode for a tool, location, or employee cannot be the same. Change the Tool's information as desired and add the new barcode. Save the Tool by selecting the Save button, the screen will return to the original state with the new Tool information.

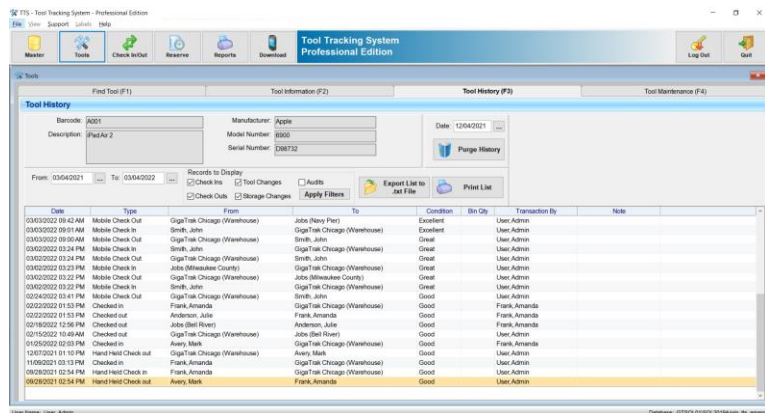
Cancel the process without saving by selecting the Cancel button. The screen will return to the original state with the Tool information unchanged.

To delete an existing Tool, select the Delete button. After asking if you are sure, the system will delete the tool. The 'Allow delete tool and purge tools history' option must be set to on in order to have access to the delete button.

TOOL HISTORY (F3)

Selecting a tool and then selecting the Tool History tab will bring up the Tool History screen.

The screen displays the history of the selected tool for the date range selected. The system defaults the date range to the last 12 months. Change one of the dates and select the Enter key or select a new date with one of the calendar controls and the list will change to reflect the new date range.



A number of filters can be used to display only certain records. This includes:

Check Ins

Check Outs

Tool Changes (such as barcode, status, condition)

Storage Changes

Audits (performed with the mobile app)

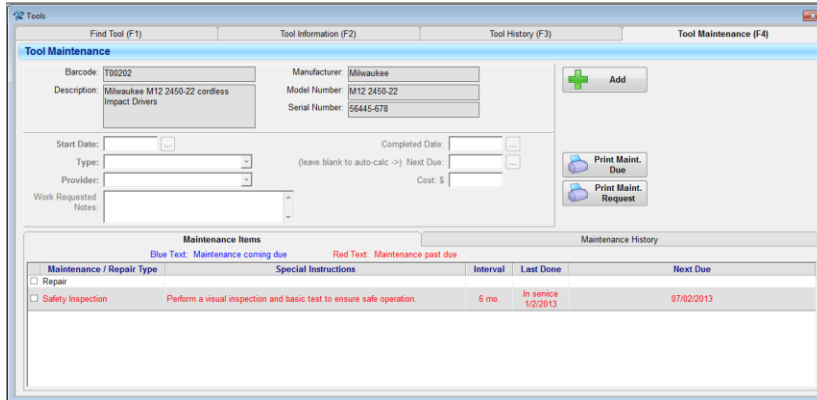
Select the check box next to each filter and press “Apply Filters” to only get those search results in the grid.

To print the history displayed on the screen, select the Print List button.

To remove all history records prior to a specified date, enter the date in the Date text box and then select the Purge button. All history records prior to the date specified will be deleted. The 'Allow delete tool and purge tools history' option must be set to on in order to have access to the purge button.

TOOL MAINTENANCE (F4) (PRO AND CONTRACTOR EDITION ONLY)

Selecting a tool and then selecting the Tool Maintenance tab will bring up the Maintenance Items/History screen below. Maintenance/Repair Types must first be setup under Support→Tool Support Administration→F4 tab.



The Maintenance Items tab lists the Maintenance/Repair Type(s) setup on the Tool Support Administration screen for specific Types of tools. Special instructions, the interval required and the dates last done and due are shown. If the type is due in the next 30-days it will be shown in blue. Past due types are in red.

Click on a Maintenance Type and press “Add” to record a maintenance transaction. The Start Date, Maintenance Type and Provider are all required fields. If the item is being sent out but not yet complete, do not choose a Completed Date. Upon saving the record, the system will offer to print Maintenance Request form to send with the item to the provider (if turned on in the Setup Options). An “open” maintenance record is then inserted into Maintenance History. When the item is returned, select the open record on the Maintenance History tab (second tab on the Tool Maintenance screen) by double-clicking the open line item. Now enter the Completed Date along with optional Notes and a Repair Cost if appropriate. Once saved, it is now a completed record in history. Items that are sent for maintenance without a completed date will automatically have a status change that says “Out For Maintenance”. When a tool is out for maintenance, it cannot be moved around. Upon completing the maintenance record, the status will automatically change back to Active.

You can also perform a Maintenance Transaction by immediately choosing a completed date. This will still write a maintenance history record but the tool will not have the “out for maintenance” status.

To print the history, select the Maintenance History tab and then select the Print Maintenance History button.

To edit the history, click on the line item of the record to be edited and press “Edit”. Change any required fields and save.

To attach an “Image/Doc” to a maintenance history record, first select the history record from the grid and press “Image/Doc”. If there is no image/doc currently tied to the record, the user will be asked if they would like to add one. Press “Yes” to attach an image/doc. The Image/Doc file path will appear and the user can select the desired file.

Once the file has been selected, it is immediately attached to the history record. Pressing “Image/Doc” again will allow the user to either View the current image/doc or replace the one currently attached.

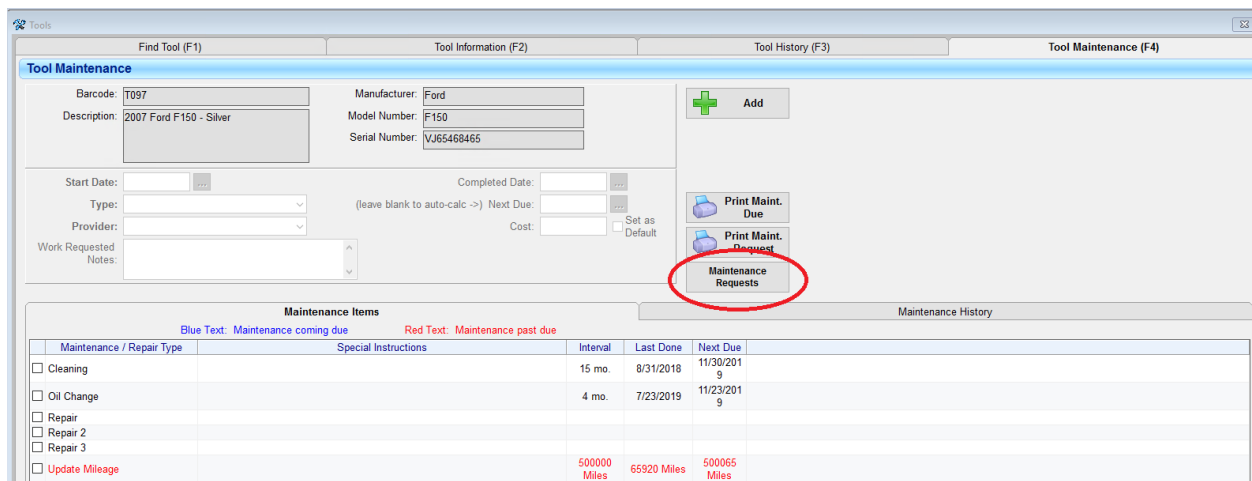
MAINTENANCE REQUESTS

The Maintenance Request feature allows users to Request Maintenance Line Items (along with Notes) without sending an item out for Maintenance. The benefit of this feature is that you are still able to

check tools out that have a Request on them (actually sending an item out for Maintenance does not allow a tool to be moved around). Once you perform a Maintenance Line item that has a Request on it, it will clear the Request out. Request Notes will show on the Maintenance History tab once the Maintenance has been started.

You can request maintenance on tools that already have a maintenance type. The below example shows a truck that needs air in its tires as well as a new air filter. Because the truck can still be used (checked in/out) until these items are completed, I will use the Maintenance Request function to request work be done.

First, highlight the tool you want to Request Maintenance on and go to the F4 tab. This truck has 4 Maintenance types associated with it. You can only request Maintenance on Types that are already in the system (add additional Maintenance Types under Support→Tool Support Administration).



Click on the Maintenance Requests Button and press “Add”. Use the drop-down menu to choose the correct Maintenance Type you would like the request to go under. Enter an applicable Notes and press Save.

Maintenance Requests

Save Cancel

Maintenance Type: Repair

Notes: Fill air in tires

Maintenance Name	Maintenance Request Notes
Repair	Fill air in tires

You can enter as many Requests as there are Maintenance Types for a tool.

Maintenance Requests

Add Edit Delete Print List

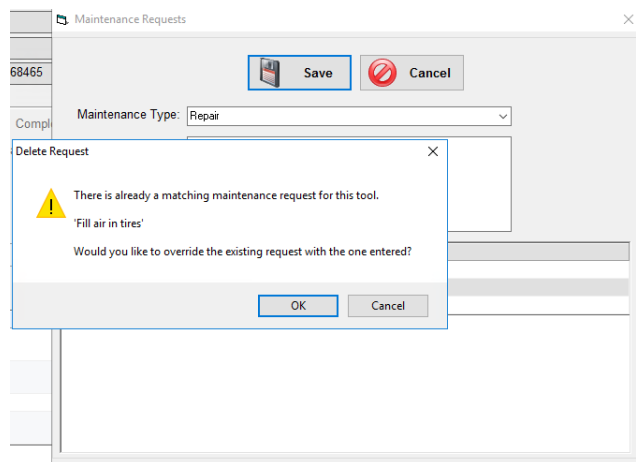
Maintenance Type: Repair

Notes: Fill air in tires

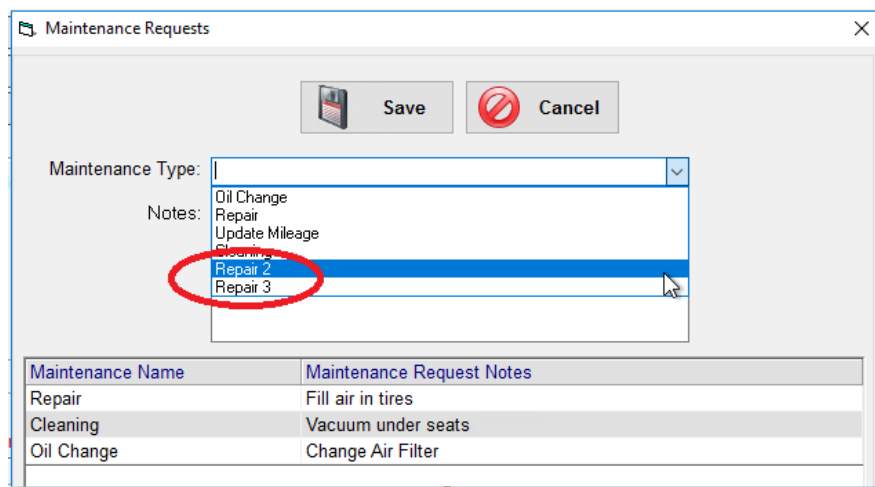
Maintenance Name	Maintenance Request Notes
Repair	Fill air in tires
Cleaning	Vacuum under seats
Oil Change	Change Air Filter

To add additional Repairs, you can either A. Edit the current repair and add additional Notes, or B. add additional Repair Types to a Tool.

A.

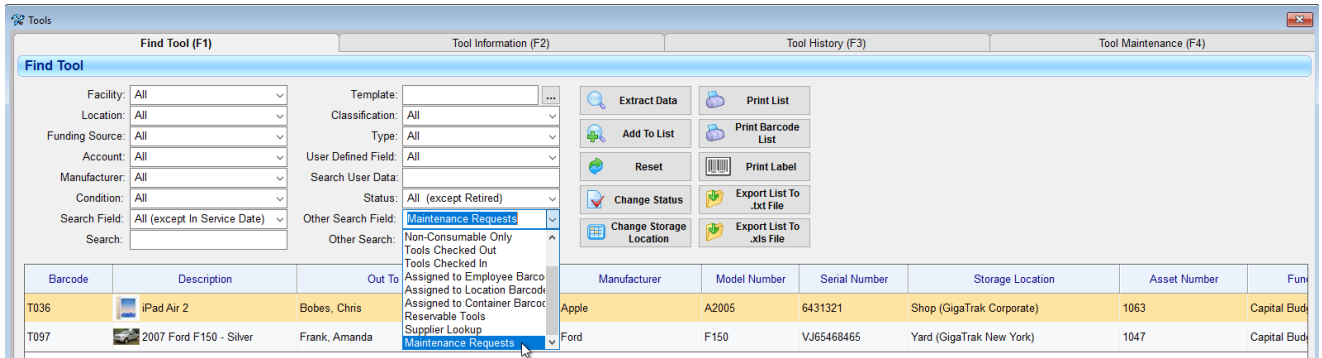


B.



*Additional "Repair" Types added under Support → Tool Support Administration.

There are 3 ways to search Tools that have Requests. First, from the F1 tab, use the “Other Search Field” and choose “Maintenance Requests” from the drop-down menu and hit Extract Data.




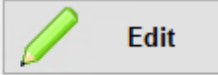


All Tools that have Requests on them will appear in the grid.

You can also run a “Maintenance Requests” report. This will show any tools that have a Request, any Request Notes, and if the tool is currently checked out to a person/location/container.

Barcode	Description	Maintenance Requested	Request Notes	Out To
T097	2007 Ford F150 - Silver	Repair	Fill air in tires	Frank, Amanda
T097	2007 Ford F150 - Silver	Cleaning	Vacuum under seats	Frank, Amanda
T097	2007 Ford F150 - Silver	Oil Change	Change Air Filter	Frank, Amanda

Last, you can print on a single tools Requests on the F4 tab in the “Maintenance Request” button.

Maintenance Requests

Maintenance Type: Repair

Notes: Fill air in tires

Maintenance Name	Maintenance Request Notes
Repair	Fill air in tires
Cleaning	Vacuum under seats
Oil Change	Change Air Filter

Tool Maintenance Requests

Barcode: 70
Description: 2007 Ford F150 - Silver
Currently Checked Out To: Frank, Amanda

Maintenance Name	Maintenance Request Notes
Repair	Fill air in tires
Cleaning	Vacuum under seats
Oil Change	Change Air Filter

Once you send an item out for Maintenance for a specific Maintenance Type, the Request will be cleared.

Tools

Find Tool (F1) Tool Information (F2) Tool History (F3) Tool Maintenance (F4)

Tool Maintenance

Barcode: T097 Manufacturer: Ford
 Description: 2007 Ford F150 - Silver Model Number: F150
 Serial Number: VJ65468465

Start Date: 9/9/2019 Completed Date: 9/9/2019
 Type: Repair (leave blank to auto-calc ->) Next Due:
 Provider: In House Cost:
 Set as Default

Work Requested Notes:

Save Cancel

Maintenance Requests

Maintenance Items Maintenance History

Maintenance / Repair Type	Special Instructions	Interval	Last Done	Next Due
<input type="checkbox"/> Cleaning		15 mo.	8/31/2018	11/30/2019
<input type="checkbox"/> Oil Change		4 mo.	7/23/2019	11/23/2019
<input checked="" type="checkbox"/> Repair				

(Repair being completed that has a Request on it.)

Maintenance History tab will list the Maintenance Line Item along with any Request Notes that may have been on it.

Tools

Find Tool (F1) Tool Information (F2) Tool History (F3) Tool Maintenance (F4)

Tool Maintenance

Barcode: T097 Manufacturer: Ford
 Description: 2007 Ford F150 - Silver Model Number: F150
 Serial Number: VJ65468465

Start Date: Completed Date:
 Type: (leave blank to auto-calc ->) Next Due:
 Provider: Cost:
 Set as Default

Work Requested Notes:

Edit Delete

Print Maint. History Print Maint. Request

Maintenance Requests

Maintenance Items Maintenance History

Maintenance / Repair Type	Provider	Work Requested Notes	Employee	Start Date	Completed Date	Next Due	Cost	Value @ Completion	Work Completed Notes	Maintenance Request Notes
<input type="checkbox"/> Repair	In House		User, Admin	9/9/2019	9/9/2019		0.00			Fill air in tires
<input type="checkbox"/> Oil Change	Jaybee Automotive		User, Admin	7/23/2019	7/23/2019	11/23/2019	65.97			
<input type="checkbox"/> Oil Change	Jaybee Automotive		User, Admin	4/30/2019	4/30/2019	8/30/2019	0.00			
<input type="checkbox"/> Oil Change	Jaybee Automotive		User, Admin	4/23/2019	4/23/2019	8/23/2019	56.99			
<input type="checkbox"/> Oil Change	Jaybee Automotive		Frank, Amanda	2/28/2019	2/28/2019	6/28/2019	65.00			
<input type="checkbox"/> Oil Change	John Smith		User, Admin	11/20/2018	11/20/2018	3/20/2019	0.00			
<input type="checkbox"/> Cleaning	John Smith		User, Admin	8/31/2018	8/31/2018	11/30/2019	15.00			
<input type="checkbox"/> Update Mileage	In House		User, Admin	8/6/2018	8/10/2018	500065 Miles	0.00	65920 Miles		
<input type="checkbox"/> Update Mileage	In House		User, Admin	7/31/2018	7/31/2018	0 Miles	0.00	65720 Miles		
<input type="checkbox"/> Update Mileage	In House		User, Admin	7/31/2018	7/31/2018	68000 Hours	0.00	62500 Hours		
<input type="checkbox"/> Update Mileage	John Smith		User, Admin	7/31/2018	7/31/2018	0 Hours	0.00	62500 Hours		
<input type="checkbox"/> Update Mileage	John Smith		User, Admin	7/31/2018	7/31/2018	0 Hours	0.00	60250 Hours		

CHECK IN/CHECK OUT TOOLS SCREEN

The Check Out process is used to check tools out to an employee or location. The Check In process is used to check tools into storage from an employee or location. Check Out and Check In can also be performed on the handheld unit. To start these processes, select the Check In/Out button.

CHECK OUT

The Check In/Check Out process is composed of three (3) tabs. The first tab is the Check Out process as shown below.

The screenshot shows the 'Check Out' screen with the following fields and table:

Barcode: 1003 Location: O'Hare Terminal 2 Construction
Due Date: 11/20/2014 Default Interval: (days)
Note:
Tool Barcode: Description:

Barcode	Description	Date	Out Date	Condition	Person	Facility	Location	Container	Bin Qty	MI
T70001	Milwaukee 1/2in Magnum Drill 0-2000RPM	11/20/2014	11/4/2014 9:26 AM	Good		Jobs	O'Hare Terminal 2 Construction			
T70003	Milwaukee 10 amp Sawzall Corded	11/20/2014	11/4/2014 9:26 AM	Good		Jobs	O'Hare Terminal 2 Construction			
T10020	Bundy Patriot 18 Volt Hydraulic Self-Contained 14-Ton Camping Tool	11/20/2014	11/4/2014 9:26 AM	Excellent		Jobs	O'Hare Terminal 2 Construction			

To check out tools:

- Select the radio dial option for the Container, Location, Employee or Member Category to which the tool will be checked out
- If desired, enter the due date for the return of the Tool. Enter a date in the Due Date box, or enter a Default Interval (number of days from today)
- If desired enter any optional transaction notes
- Scan or enter the Tool barcode in the Tool Barcode Field

- If the Tool is a binned item, a box will appear below the barcode to enter the quantity being checked out

The tool checkout information will be displayed in the grid. To check out another tool to the same location/employee and with the same due date, scan or enter another tool barcode.

If no scanner is available, you may enter the barcode information into the barcode text boxes and then press the enter key on the keyboard. You may also select the find (...) button next to the textboxes to display a list to choose from.

Items that are entered into the grid by mistake can be removed by selecting the item and clicking the Remove Item button.

Once items are displayed in the grid, the Out Date/Time can be changed by clicking the Change Out Date/Time button. A confirmation box will appear to indicate that the date/time will be changed for ALL items shown in the grid. Responding "Yes" will display a calendar where you can select the desired date and time.

When all desired tools have been checked out, select the Save or Save/Print button. The check out information will be saved and, if Save/Print was selected, the system will ask if you wish to print the check-out report. The system will then clear the check-out list.

To cancel the check-out process, select the Reset/Clear button. After confirming you wish to reset the check-out process, the system will clear the check-out list without saving it.

The column layout of the grid can be changed by dragging and dropping each column using the column title. This must be performed before tools are added to the grid.

CHECK IN BY TOOL

To check in an individual tool, select the Check In by Tool tab. The screen will change as indicated below.

Barcode	Description	Due Date	In Date	Condition	Facility	Location	Bin Qty	From	Status	Miles	Hours
T00020	Bundy Patrol 18 Volt Hydraulic Self-Contained 14-Fin Comping Tool	11/20/2014	11/4/2014 9:27 AM	Excellent	ACME Central Warehouse	Shelf 100		OffAxis Terminal 2 Construction			

To check a tool into storage, scan the tool barcode or enter the tool barcode and then press the Enter Key on the keyboard. If the tool is a binned item, a box will appear to enter the quantity being checked in. The check in information will be entered in the list. Condition, Facility, and Storage Location may be changed. Select the column you wish to change, select the Enter key and pick the new Condition, Facility, or Storage Location from the list.

If a consumable binned barcode is entered, a pop window will appear with all checkout transactions within the last month that have occurred with this barcode. Date filters can be changed to expand or condense the results listed in the grid. Choose the transaction you wish to return the consumables against by double clicking on it from the grid. The screen will return to the previous one and ask for the quantity being returned. Enter the quantity and press enter. Then press “Save” or “SAVE/PRINT”.

Consumable binned items can also be added to inventory on this tab when new purchases occur. Enter the consumable barcode. A popup window will appear. Mark the radio dial labeled “Restock from Supplier” and press “OK”. Enter the quantity you purchased and press “OK”.

Once items are displayed in the grid, the In Date/Time can be changed by clicking the Change In Date/Time button. A confirmation box will appear to indicate that the date/time will be changed for ALL items shown in the grid. Responding “Yes” will display a calendar where you can select the desired date and time.

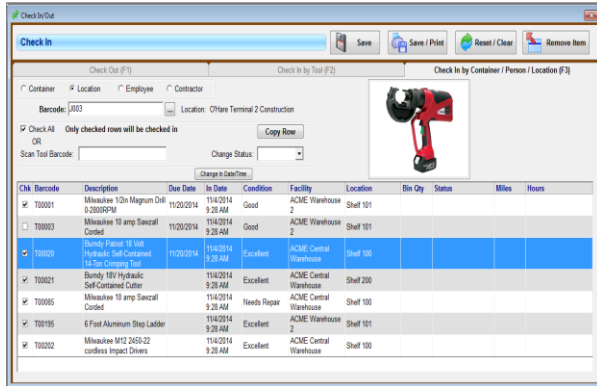
When all tools have been checked in, select the Save or Save/Print button. The check in information will be saved and, if Save/Print was selected, the system will ask if you wish to print the check in report. The system will then clear the check in list.

To cancel the check in process, select the Reset/Clear button. After confirming you wish to reset the check in process, the system will clear the check in list without saving it.

Check In can also be performed on the handheld unit.

CHECK IN BY CONTAINER / PERSON / LOCATION/MEMBER

To check in tools assigned to either a container, an employee or a location select the Check In by



Container / Person / Location tab. The screen will change as indicated below.

To check a tool into storage, first select or scan the container, employee or location barcode the items are being returned from. A listing of all items checked out to the container/employee/location will be displayed. You can then click the check box for each line item being returned. Binned item quantities can also be changed in the grid if desired.

A Check All option box will check or uncheck all checkboxes for each line item listed. Alternately, you can scan individual tool barcodes to check the checkbox. You can also change the status to Lost or Broken for any items checked. The change occurs on Save. If someone returns multiple tools but has lost others, check-in the returned items first and Save. Then, do a new check-in for the individual and confirm that the remaining items listed are lost. Check All and Change Status to Lost then Save. The COPY ROW function allows you to split up binned items being returned so that alternate locations can be assigned. Verify the QUANTITY is correct before saving!

Once items are displayed in the grid, the In Date/Time can be changed by clicking the Change In Date/Time button. A confirmation box will appear to indicate that the date/time will be changed for ALL items shown in the grid. Responding "Yes" will display a calendar where you can select the desired date and time.

When all tools have been checked in, select the Save or Save/Print button. The check in information will be saved and, if Save/Print was selected the system will ask if you wish to print the check in report. The system will then clear the check in list.

To cancel the check in process, select the Reset/Clear button. After confirming you wish to reset the check in process, the system will clear the check in list without saving it.

Check In can also be performed on the handheld unit.

Barcode	Description	Out Date	Facility	Location	Bin Qty
T00012	M17™ Cordless LITHIUM-ION 1/2" Hammer Drill Driver Kit	11/4/2014 9:33 AM	ACME Central Warehouse	TRANSFER TO AW2	
T00020	Bundy Patriot 18 Volt Hydraulic Self-Contained 14-Ton Crimping Tool	11/4/2014 9:33 AM	ACME Central Warehouse	TRANSFER TO AW2	

TRANSFER TOOLS SCREEN

Transferring Tools is a process used to relocate tools from one Facility/Location to another. To start this process, select the Transfer Tools button. Keep in mind that only Facility/Locations designated as a Transfer Location on the Location

Administration screen will be displayed in this form.

Understanding the basic transfer process is important. Just because an originating location transfers “Out” tools to a destination location does not mean that all of the tools arrive as intended. To manage this process requires BOTH the sender and receiver to acknowledge the items being transferred. If the sender lists ten (10) tools that they sent, but the receiver only acknowledges eight (8) tools – two (2) tools are now unaccounted for. It becomes the responsibility of both parties to resolve the discrepancy. The remaining two (2) tools will still be shown in the Transfer Out screen of the sender and must be reconciled at some point. If lost, the best method to correct the problem is to:

1. The sender selects the lost tools in the Cancel Transfer screen and saves the transaction. The tools are now in the sender’s inventory.
2. The sender then selects the individual record for each lost tool and changes the tool status to “Lost”. Inventory is now accurate until the lost tools are found.

TRANSFER OUT

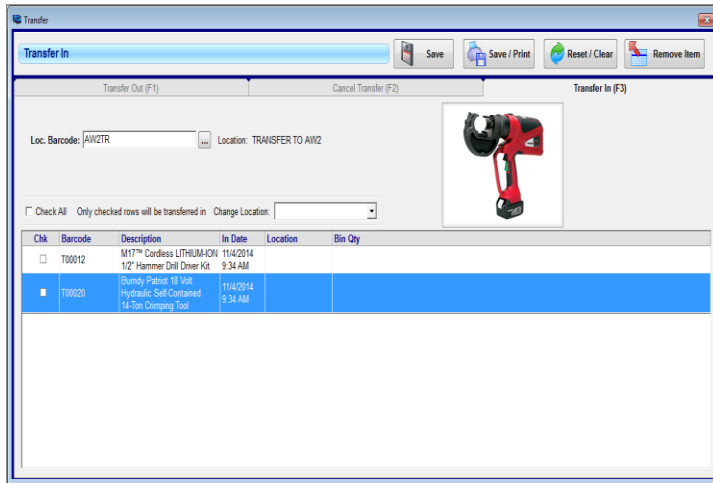
The Transfer Out process allows the user to select a Location Barcode that the selected tools will be transferred to. Once a location is selected, the user then scans all of the tool barcodes being transferred. You must enter the quantity being transferred for binned items. **CAUTION: When transferring binned items, the system will try and match up barcode IDs based on the Master/Catalog ID of the item being transferred. Adjustments to inventory may be necessary should IDs not match.**

CANCEL TRANSFER

The Cancel Transfer process allows the sender to cancel items being sent, and returns them to inventory. Select the Cancel Transfer tab on the Transfer form to proceed.

To cancel a transfer, the user needs to first select the destination location where the tools were “Transferred Out” to. It is important to note that only those inventory items not yet “Transferred In” by the receiving location will be listed. The user only needs to check off the line items being cancelled and save the transaction.

TRANSFER IN



The Transfer In process allows the receiver to acknowledge receipt of transferred items being sent to their inventory. If all items are received, just select Check All and Save. If you desire to change the receipted location, select the Change Location dropdown. Any checked items will be relocated to the designated location upon Save.

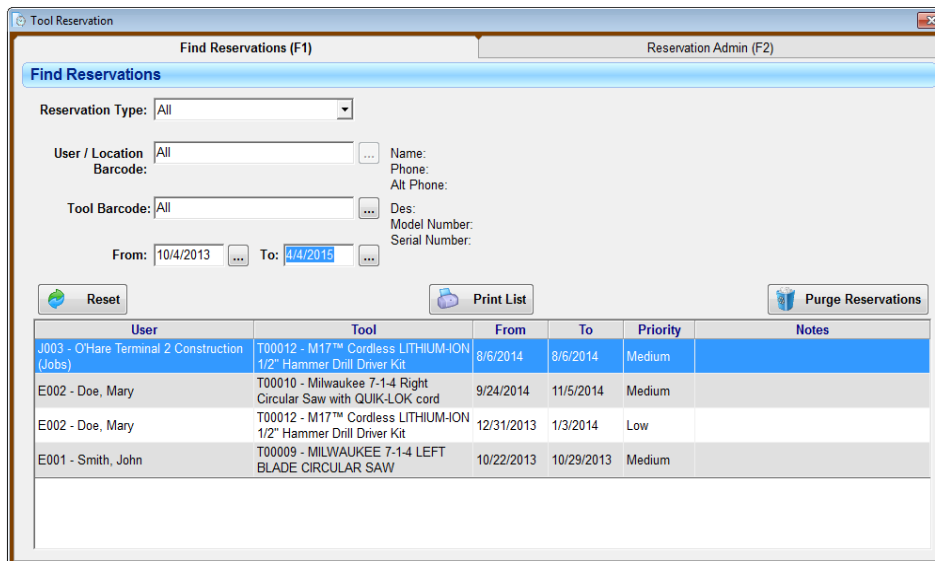
RESERVING TOOLS SCREEN

Reserving Tools is a process used to reserve the use of a tool for a specified period of time. To start this process, select the Reserve button. The screen below will be displayed.

FIND RESERVATIONS

The Reserving Tools process is composed of two (2) tabs. The first tab is the Find Reservations process. This is used to find the current reservations for a tool or employee/location.

To view the reservations for a User/Location, scan the User/Location barcode into the User/Location



Barcode textbox and the reservations for the User/Location in the date range specified will be listed.

To view the reservations for a tool, scan the Tool Barcode text box and the reservations for the Tool in the date range specified will be listed.

If no scanner is available, you may also enter the barcode in the barcode text boxes followed by pressing the Enter key on the keyboard. Another option is to select one of the find buttons, to display a list from which you may select.

To change the date range for the reservation list, enter a new date and then select the Enter key or set the date using the calendar control. The list will change to reflect the new date range.

RESERVATION ADMIN

The second tab is the Reservation Admin process. The Reservation Admin process is used to add new reservations and edit or delete existing reservations.

To add a new reservation:

- Select the Reservation Admin tab,
- Select the Add button, the screen changes as indicated.
- Scan the Location or Employee barcode or select the Find button.
- Scan the Tool barcode or select the tool.
- Set the date and time range for the reservation.
- Select a Priority. High Priority items cannot be checked-out to any person or location except the one holding the reservation. Low/Medium Priority settings alert the person checking out the tool if it is to a different location/user than the one holding the reservation.
- If you desire, add a note and set the priority, then select the Save button.

To edit an existing reservation:

- Find the reservation in the Find Reservation tab,
- Select the Reservation of interest,
- Select the Reservation Admin tab,
- Select the Edit button,
- Modify the information as desired,
- Save the reservation.

To delete an existing reservation:

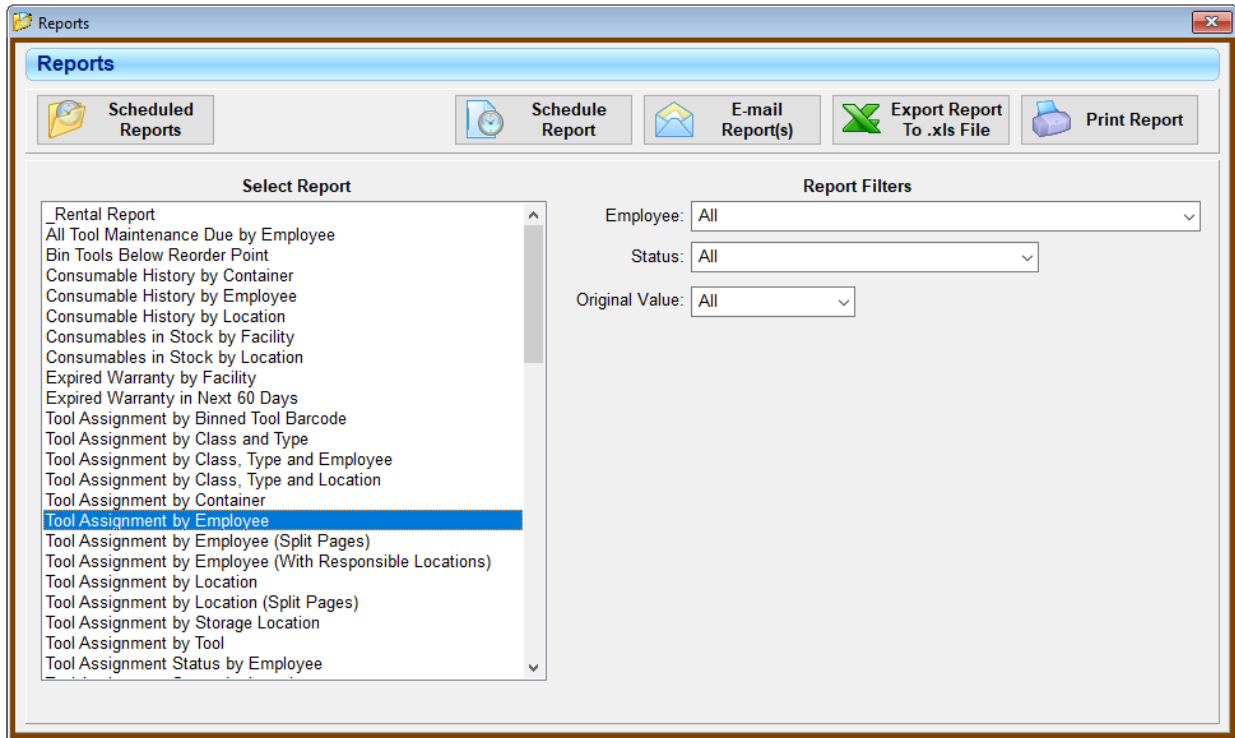
- Find the reservation in the Find Reservation tab,
- Select the Reservation Admin tab,
- Select the Delete button.

After verifying the deletion, the system will delete the reservation.

REPORTS SCREEN

Each report has a different set of Report Filters that the user can select to create the report results they desire.

When the filters are set, the user then selects the Print Report button. A print preview screen will be displayed from which the report may be printed, saved as a PDF or Email(ed) (only if Microsoft Outlook is used). Furthermore, all reports can be exported directly to Excel.



AUTO E-MAIL REPORTS

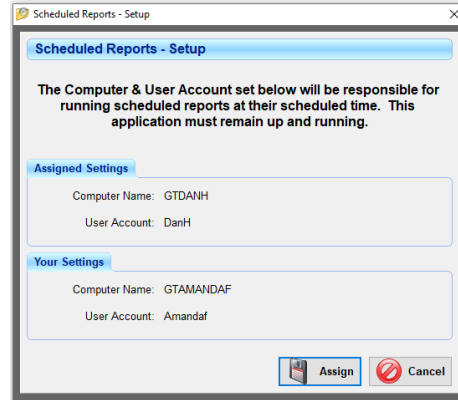
Several reports (Tool Assignment by Employee, Tool History by Employee, Tool Value by Employee, etc) give you the ability to Auto E-Mail the report when desired. Select "Email Report(s)" so that each person gets their own email with their information. Only employees with an email address record will receive their email report. Please note that self-hosted customers must have their SMTP Host information entered in the Setup Options for this feature to work.

SCHEDULED REPORTS

All reports can be scheduled to automatically be sent out at a certain date/time to a selected group of email addresses in either PDF or Excel format. First, a designated computer must be assigned as responsible for running scheduled reports at their scheduled time. Go to File-Setup Scheduled Reports. Press "Assign" and the current PC/Windows Login will now be used to send out scheduled reports. This

PC/Windows login MUST be logged in at any time a report is scheduled to be sent out. The profile of the person logged in to the TTS System at the time does not matter.

Please note that self-hosted customers must have their SMTP Host information filled out in the Setup Options in order for reports to be scheduled and sent out.



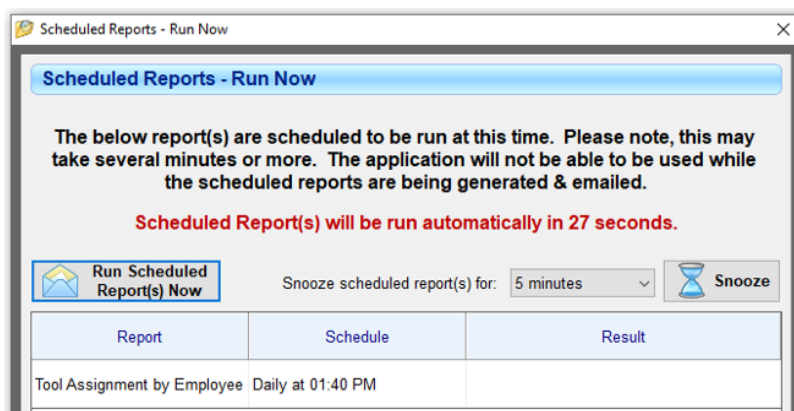
To schedule a report, go to the Reports icon. Highlight a report by clicking on it and choose the specific report filters you wish to have. Click on “Schedule Report”. Choose the frequency the report should be sent out and the Recipients of the scheduled report. If the report has date filters, you can choose to run the report with the date filters you have chosen or “Relative to Today”. This will always update the scheduled report to include all items up to today’s date.

Determined by Report: Employee reports will only be sent to each employee individually if they are listed on the report. Employee must have an email address listed in their profile.

Email: One or more email addresses can be entered using a comma to separate.

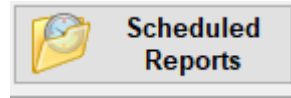
Choose the format of the report to be either PDF or Excel (cannot do both). Scheduled reports can be sent to Inactivate to pause sending.

When the time of the scheduled report arrives, a popup will appear on the assigned PC with a 30 second count down. Once the timer reaches zero, the assigned PC will freeze until all reports have been sent. This may take several minutes or more. To bypass the count down, press “Run Scheduled Report(s) Now”. If a user is in the middle of a task, they can also choose to “Snooze” the schedule report(s) for a predetermined amount of time using the drop-down menu. The assigned PC cannot do any transactions while scheduled reports are being sent out.



If the assigned PC is not logged in at the time a scheduled report is due to go out, the system will send all past due scheduled reports the next time the assigned user logs in to the system.

To view a list of all scheduled reports and their log history, click on “Scheduled Reports” in the Reports icon.



The first tab will list all active and inactivate scheduled reports as well as the last result of the report being sent out. Click on and highlight a report and go to the second tab (log) to see the log results of the report being sent out via the schedule. Users can also view log history with specific date filters and purge log history if need be.

Scheduled Reports				
Report	Schedule	Email	Active?	Last Result
Tool Assignment by Employee	Daily at 02:00 PM	amandaf@gigatrak.com	Yes	Success - 02/23/2022 02:01 PM
Tool Assignment by Employee	Daily at 09:30 AM	amandaf@gigatrak.com	Yes	Success - 02/24/2022 09:31 AM
Tool Assignment by Employee	Daily at 01:45 PM	amandaf@gigatrak.com, amanda4444@gmail.com	Yes	Success - 02/24/2022 01:41 PM
Tool Maintenance Due	Daily at 02:00 PM	amandaf@gigatrak.com	Yes	Success - 02/23/2022 02:01 PM
Tool Purchase Value by Storage Location	Daily at 02:00 PM	amandaf@gigatrak.com	No	Success - 02/23/2022 02:01 PM

To Edit a Scheduled Report, highlight it from the grid and press “Edit”. Scheduled reports can also be deleted. Deleting a scheduled report does not delete any data in the system.

CUSTOM REPORTS

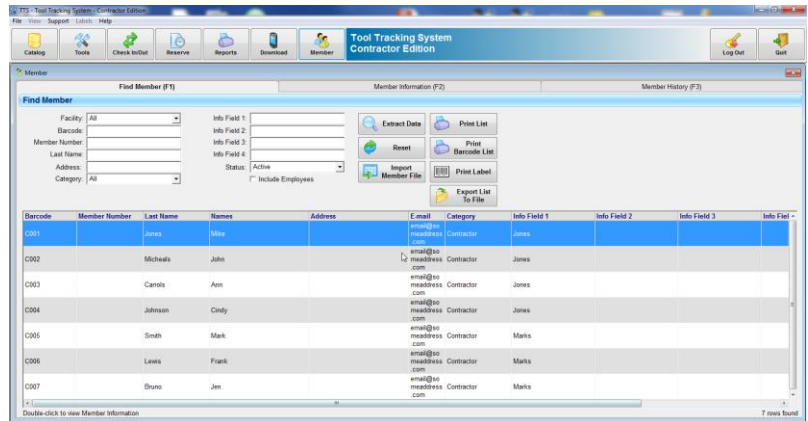
If desired, Gigatrak can provide custom reports at your request. These reports will be quoted separately and automatically added to the Select Report listing when installed.

MEMBERS/JOBS SCREEN (CONTRACTOR EDITION ONLY)

MEMBERS/JOBS

FIND MEMBER/JOB

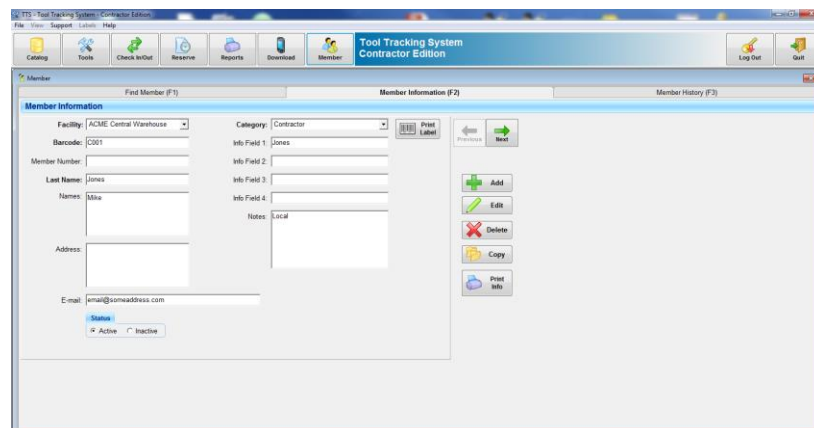
The 'Find Member/Job' tab resembles the 'Find Tools' tab in the Tools screen. The first tab is used to view members/jobs, print a list of member/jobs, and print member/job labels. The list of members/jobs on the screen is controlled by the multiple selections on the upper part of the form.



Several key aspects are available on the form. As an example, selecting the Reset button will return all selections to All. In addition, the Member/job list can be sorted by one of its columns by clicking on the heading of that column. A second click will reverse the sort order of the items in the listing. The Include Employees check box adds the employees to the data when it is extracted and makes the history viewable for the employees.

MEMBER/JOB INFORMATION

The 'Member/Job Information' tab resembles the 'Tool Information' tab in the Tools screen. The second tab is used to add, edit, and delete information on various members/jobs in the system.



Member/Job Information that is bolded is required.

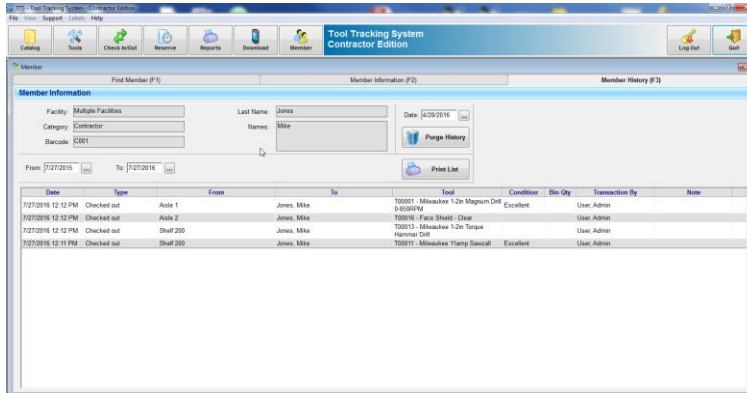
Users can also print information regarding each member/job in the system.

The information in these screens will be either member-related or

job-related depending upon which option is selected in the “Setup Options” screen. The information will carry over from one function to the other.

MEMBER/JOB HISTORY

Selecting a Member/Job and then selecting the Member/Job History tab will bring up the Member/Job History screen below.



The screen displays the history of the selected member for the date range selected. The system defaults the date range to the last 12 months. Change one of the dates and select the Enter key or select a new date with one of the calendar controls and the list will change to reflect the new date range.

To print the history displayed on the screen, select the Print List button.

To remove all history records prior to a specified date, enter the date in the Date text box and then select the Purge button. All history records prior to the date specified will be deleted for that member/job. The 'Allow delete tool and purge tools history' option must be set to on in order to have access to the purge button.

If you have any questions, please contact support@gigatrak.com or call 262-657-5500 ext. 2