TOOL TRACKING SYSTEM QUICK START GUIDE

QUICK START OVERVIEW

This brief Quick Start guide provides the general information you need to begin entering data into the system and using TTS for the first time! Take a good look through the system and manuals before proceeding too far! Keep in mind that there are three different versions of TTS including the Basic, Pro and Contractor editions. Some features may not be available in your version. Please refer to the TTS User Manual for detailed system instructions. If you are trialing out the system, there may be a sample database for you to easily do transactions. If you would rather start with a clean database, please notify support@gigatrak.com.

Login/System Setup Options

STEP 1 – Cloud Login (Skip for Self-Hosted)

To login to the cloud portal, go to web.gigatrak.cloud. Using your Acknowledgement email, enter the RDP credentials that were provided to you. ALL usernames will start with gt\ (you must include this). Enter the provided password. Once logged in to the portal, click on the Win TTS icon. The program will open in a new browser. It is recommended to allow all settings and choose (do not show again for these settings). If you are using a cloud trial, you will be logged in to the system automatically under the Admin. If you have purchased a full system, continue to follow the below instructions for logging in as the Admin. Cloud systems have two logins. First login gets you into the cloud portal (this is the gt\ login) and the second login gets you into the actual Tool Tracking System. Eventually, you will create your own user profile in the system so that the secondary login is unique to just yourself. The first login will stay the same (with the exception that the password can be changed).

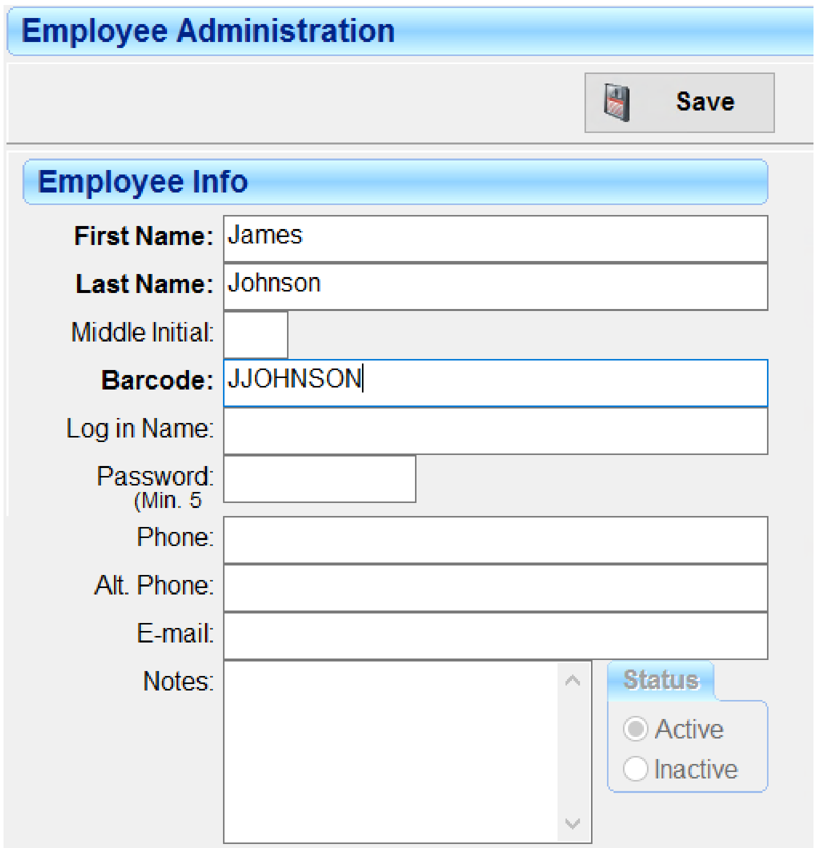
STEP 1.1

When accessing the system for the very first time, you will use the Admin login. The Admin login credentials are given to you in your Order/Trial Acknowledgement email. After logging in as the Admin, the system will automatically open up an Employee Profile for you to add in your very first employee (blank databases only. Trial accounts will not pop this screen open for the first time). Normally, this is you creating a profile for yourself (as we should only login as the admin for specific admin functions). This profile will have Edit right to all functions. Press Save and the system will automatically login you in as that profile.

ENTER EMPLOYEES

STEP 2

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.



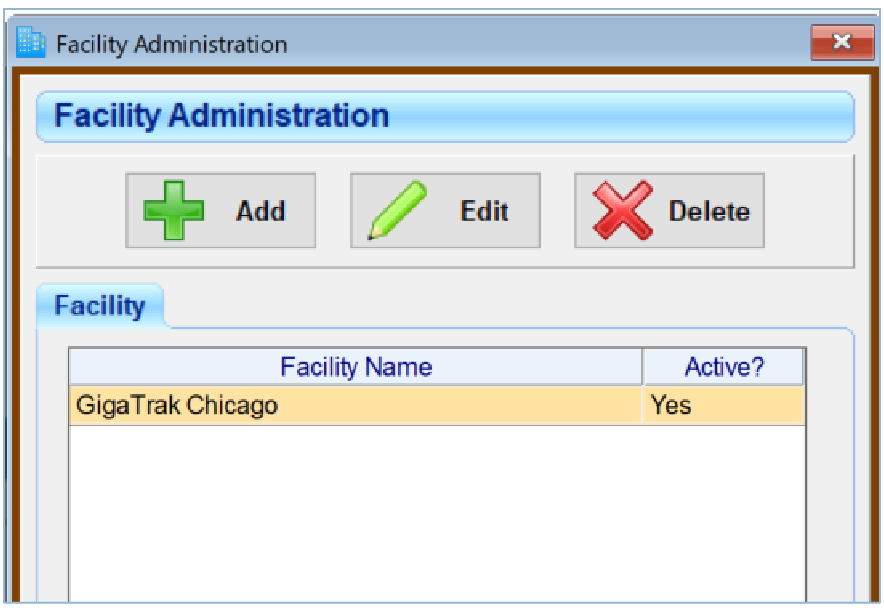
*Each employee is given a barcode or unique ID. This can be anything you desire. If you already have an employee ID number or badge number for employees, continue to use that and put that number in the Barcode field. If you do not, you can use any set of unique characters you wish. A first initial with last name is often used for customers who need to make up a barcode.

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

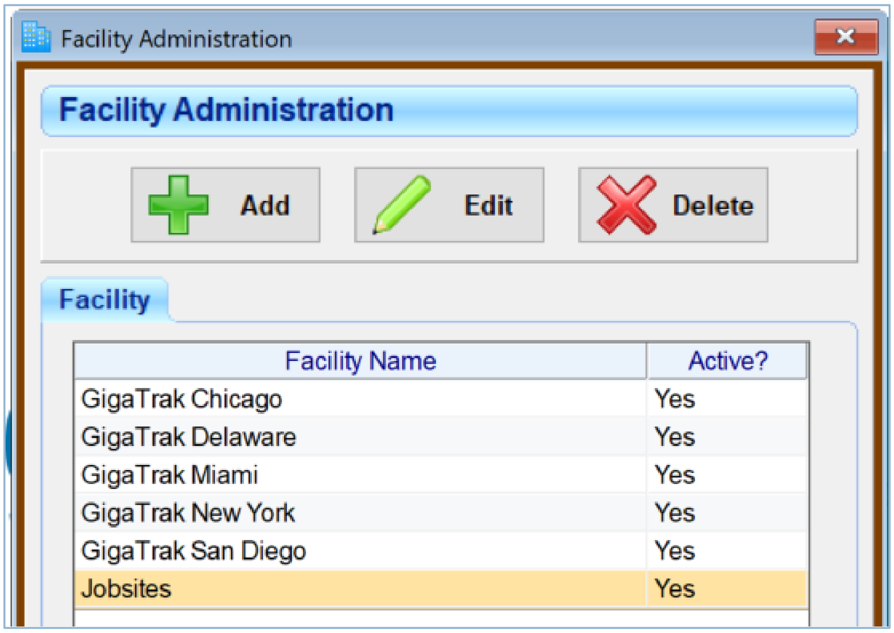
FACILITIES/LOCATIONS

STEP 3

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).

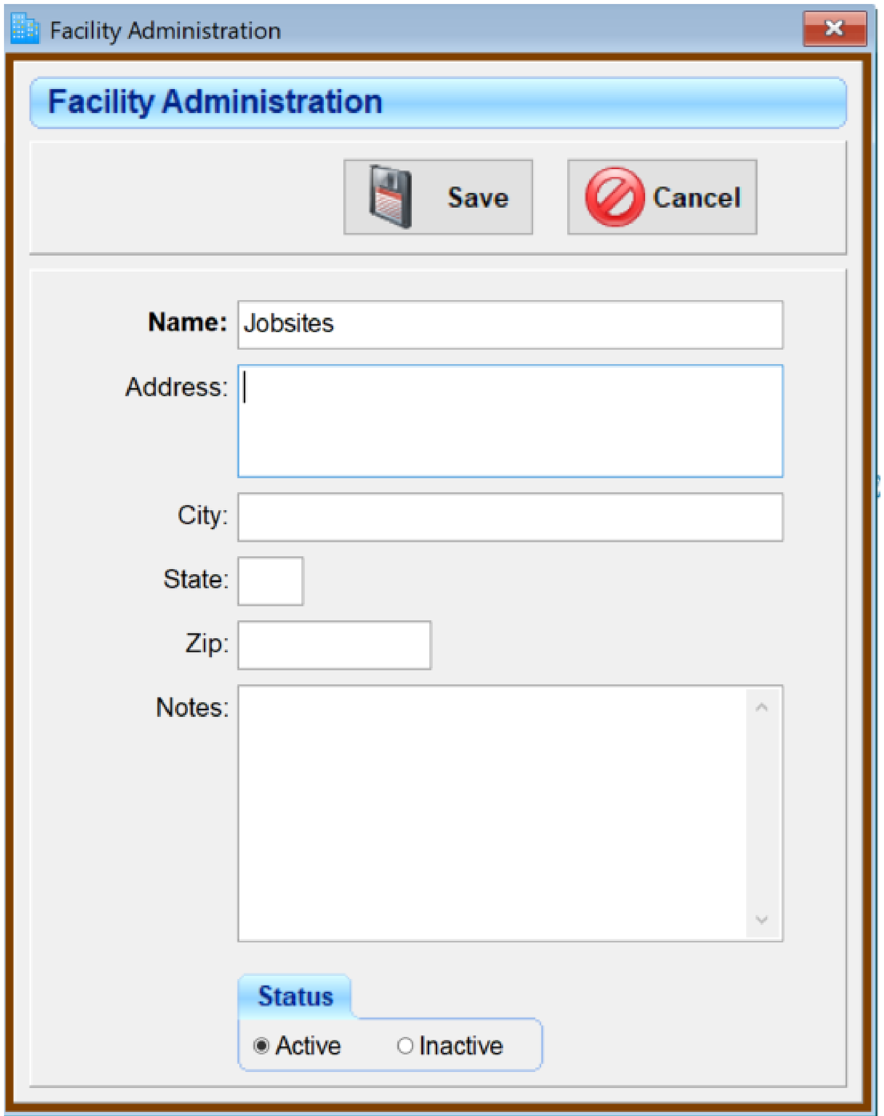


*One Facility



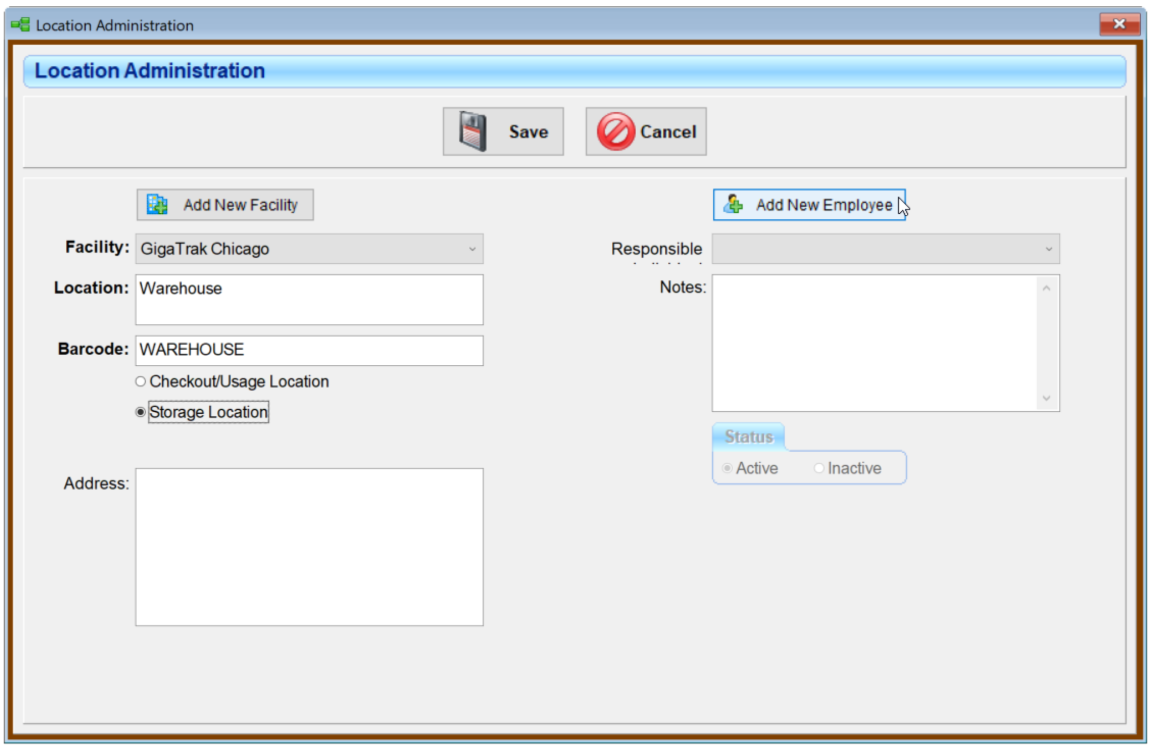
*Many Facilities

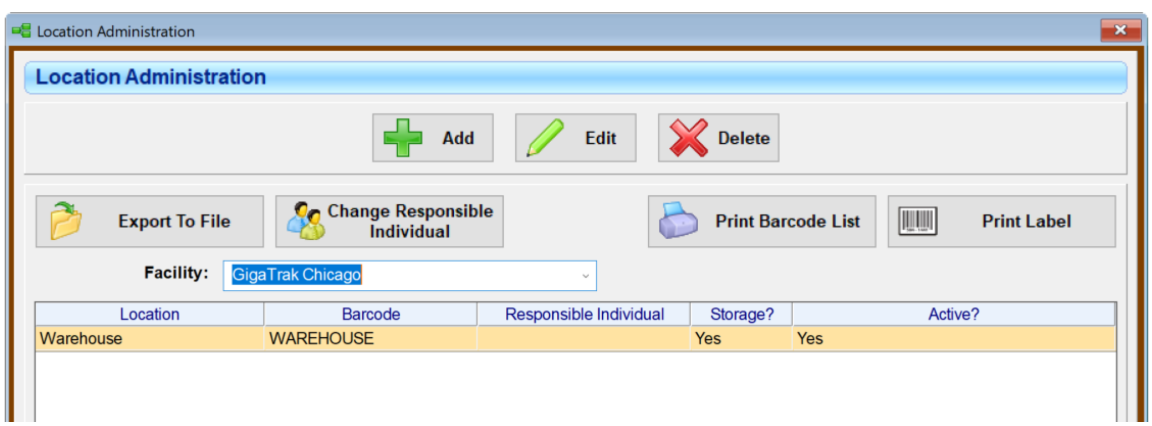
If you plan on checking out assets/tools to jobsites, or classrooms, or customers, or something similar in nature, it is recommended that you create a fictitious facility called such. For example, many customers check tools out to jobsites. Therefore, it is best to create a fake facility called “Jobs” or “Jobsites” (Or “Customers” or “Classrooms”, etc.). This is not a real building, but it will be used as a placeholder to keep these types of locations in their own grouping for better reporting.



*Example of a fictious Facility
(real jobsites will be entered as specific locations)

Next, you 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 sub-location to. Click "Add". Add in a Location name where your tools are stored. This can be a very general location like "Storage" or "Warehouse" or "Tool Crib". The Location must also have a barcode. You can make up a barcode, put in a pre-printed barcode number or just put in the same thing as the Location name (example below). Mark this as a Storage Location. *Address, Responsible Individual, and Notes are optional.*

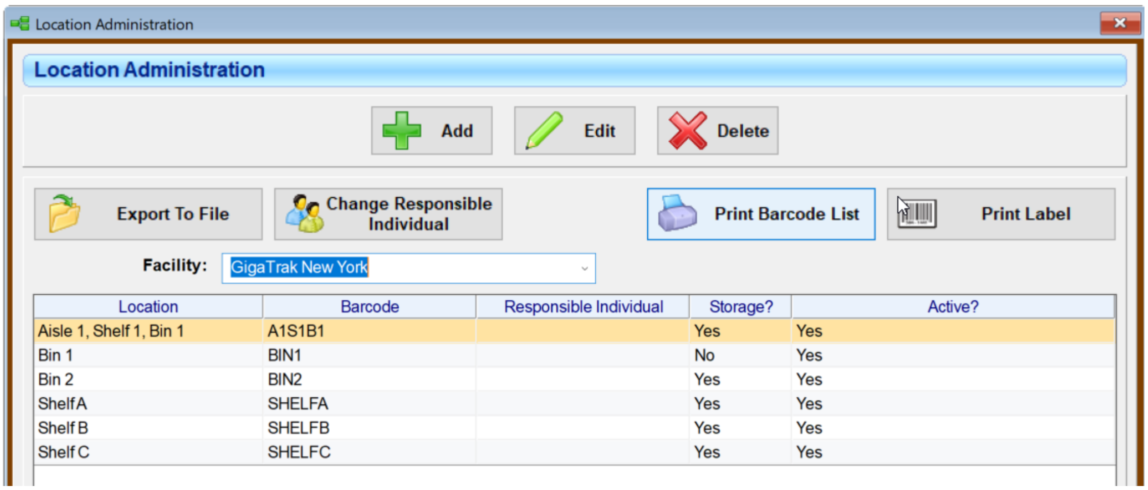




*Example of having only one storage location and not getting very specific

Every tool that is entered in to the system, MUST have a storage location.

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.

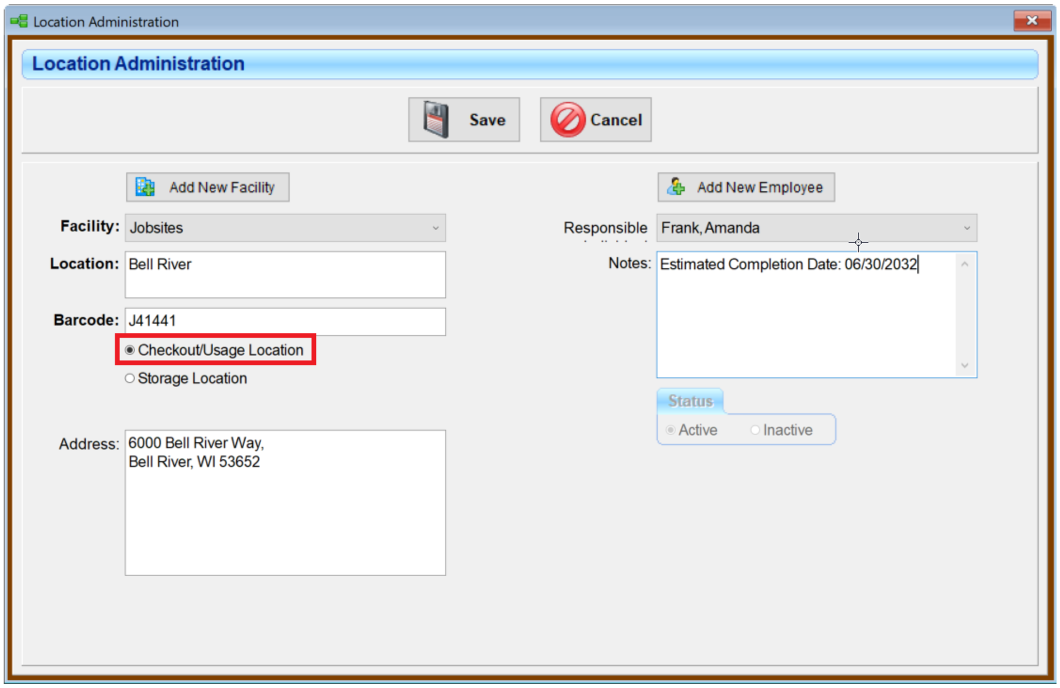


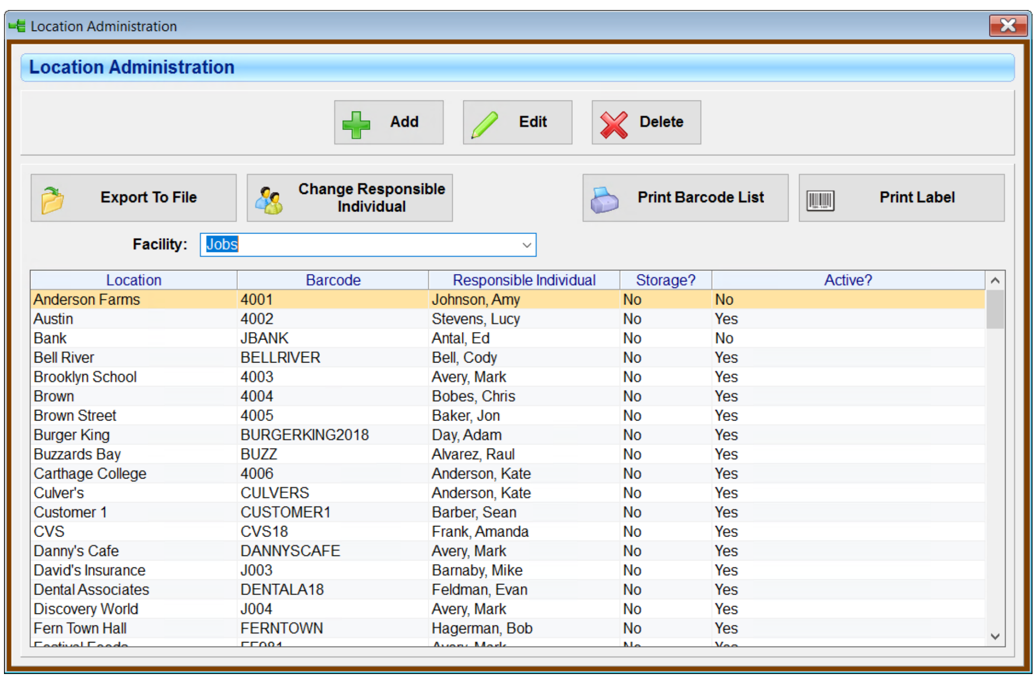
*Example of many specific Storage Locations

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

If you plan on only checking out tools to **employees**, you are done with the Facilities/Locations. However, if you plan on checking out items to locations such as jobsites, you will need to create checkout/usage locations now.

In Location Administration, using the Facility drop-down menu, pick the Jobs Facility (or whatever fake facility you created). Press "Add". Put in your job name and barcode (if you use job numbers or job codes, you should use that as the barcode). This is where an item is being used (not stored) and therefore will be a Checkout/Usage Location.





Please note this is only one example of checkout/usage locations. Every situation is different. You may be checking out to classrooms, or work areas, customers, trucks, projects, etc.

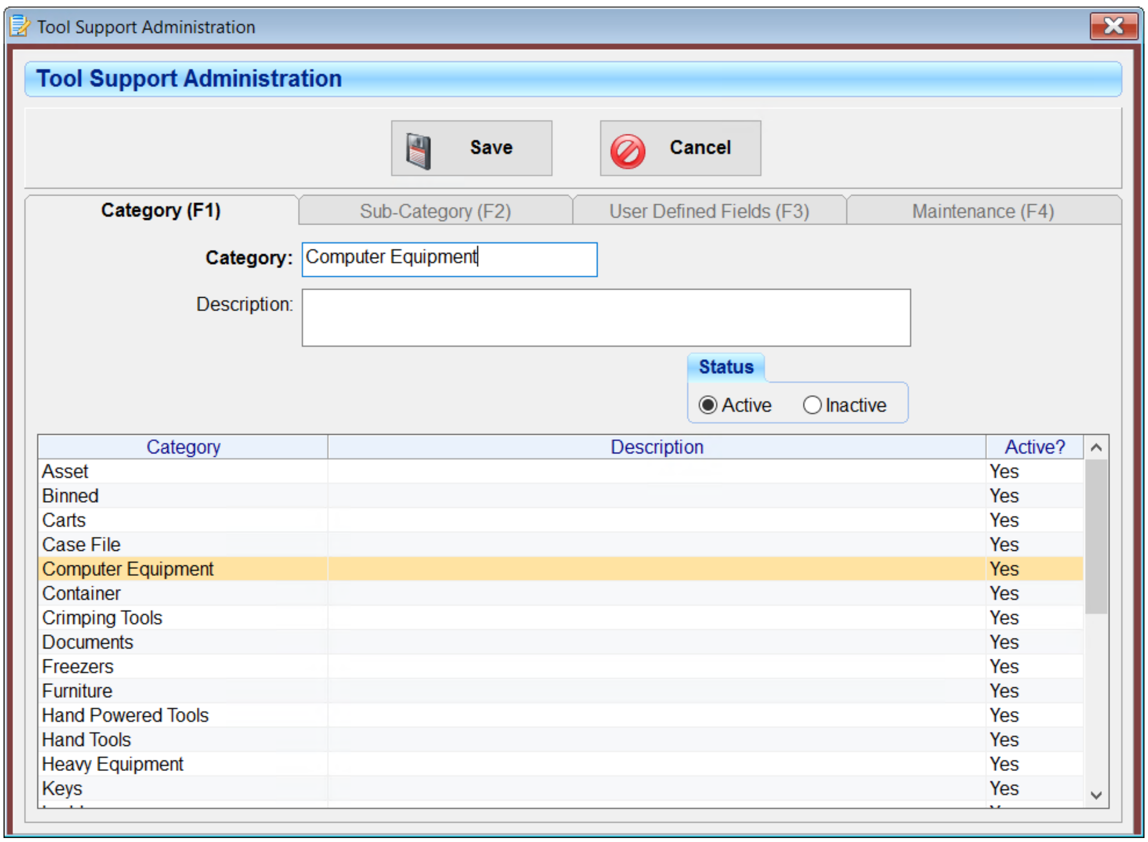
For questions not covered in this guide, please contact training@gigatrak.com or support@gigatrak.com or call us at 262-657-5500.

CLASSIFICATIONS/TYPES

STEP 4

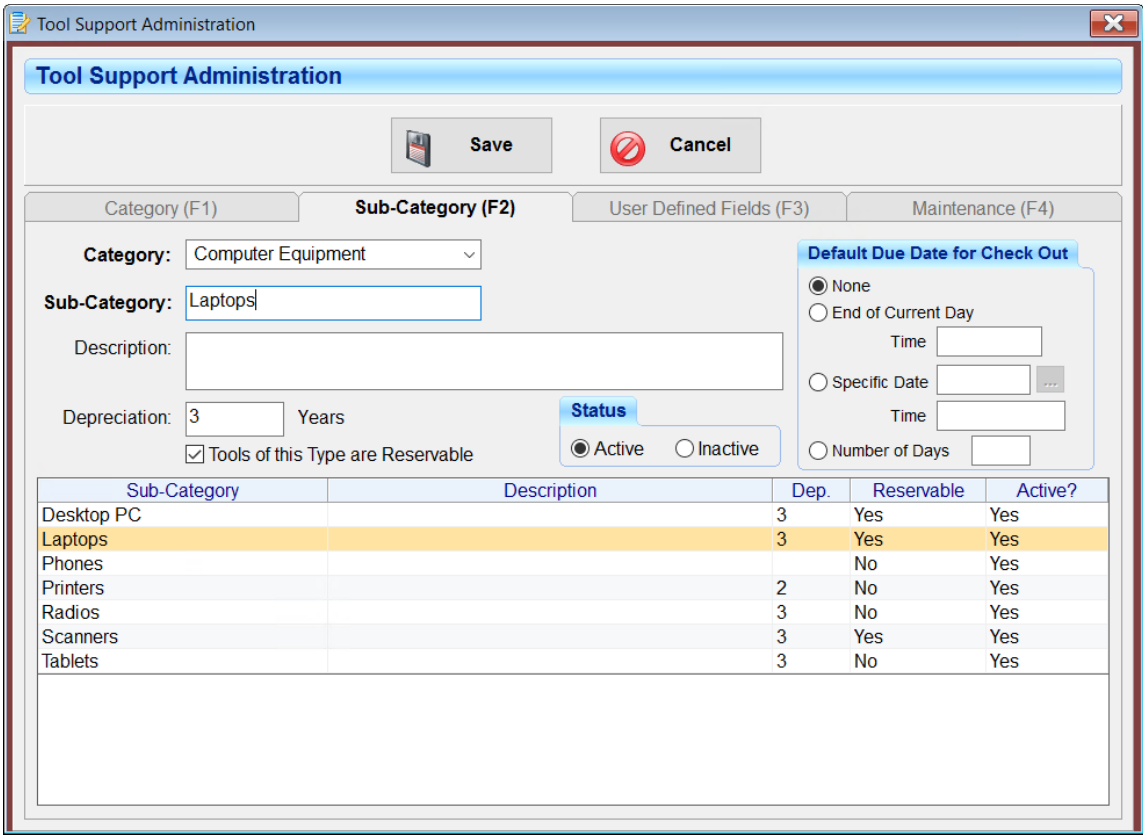
Next, you need to create Classifications and Types for your tools. Classes and Types also have a Parent/Child relationship. Every single tool **MUST** have a Classification and Type. Classes and Types can also be referred to as Categories and Sub-Categories for your tools.

Go to Support ➔Tool Support Administration. The first tab is for creating your Classifications (Categories) that tools will be grouped as. Remember, you are NOT yet entering real tools or assets into the system; just creating Categories and Sub-Categories that your tools will get grouped in to. Just like Facilities and Locations, you can choose to get very general or very specific with your structuring. Press "Add" to add in a new Classification. *Descriptions are optional.* Below, I have a number of different Classifications. This example focuses on "Computer Equipment",



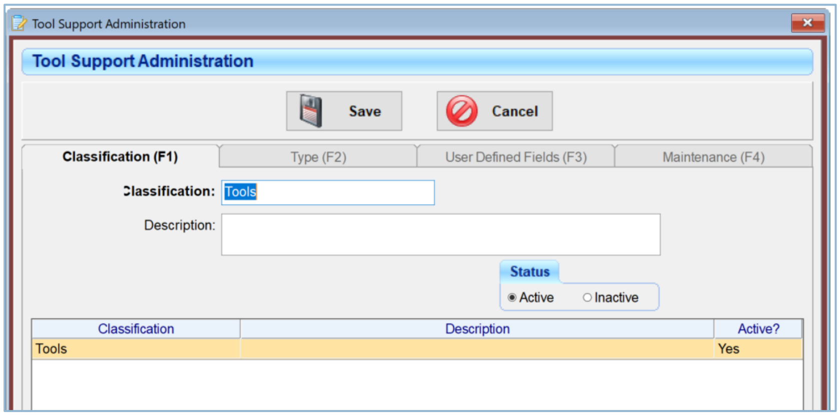
Press "Save".

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

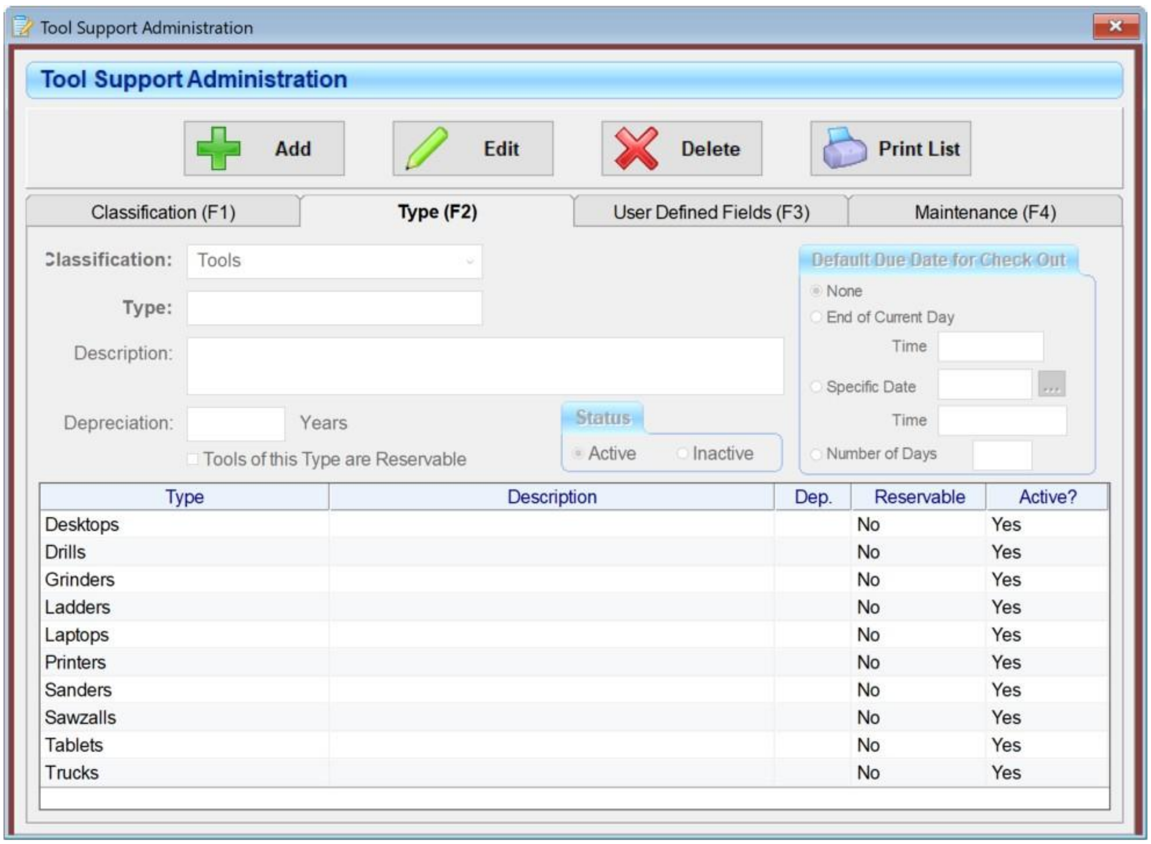


Description, depreciation, and default due dates are all optional. Reminder, you are still not yet entering specific assets/tools. Later, when you enter a real tool, you will get to give it a specific description.

Another example of Classifications and Types is going very general. In the below example, I only have one Classification and with multiple types underneath.



*Example of one very general Classification (Category)



*Specific Types under the one Classification

Every customer has a different structure for their Classifications and Types. It is up to your company to decide on how specific or general you get with these. Remember, you are **NOT** adding in real tools yet; just creating Categories and Sub-Categories for your tools to be grouped to. These Classifications and Types will be important filters for narrowing down your tools when you are looking for something specific. It is recommended that you discuss this structure internally as a group and graph them out on a piece of paper before adding them into the system.

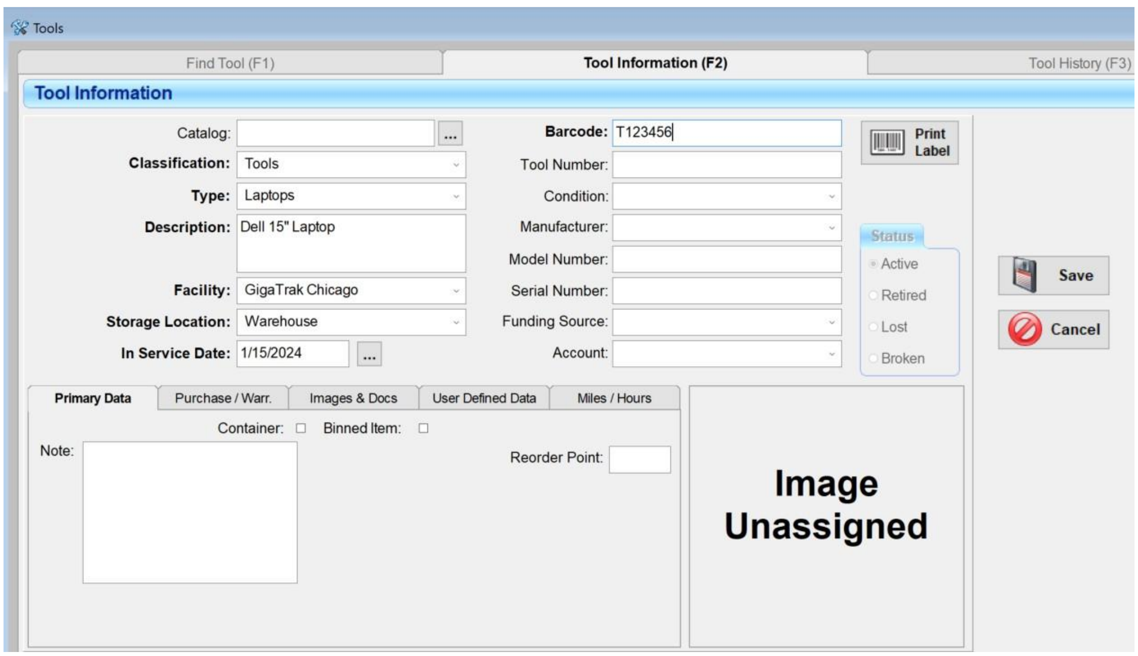
You have now finished doing the bare minimum setup and are ready to add in new Tools.

ADD NEW TOOL

STEP 5

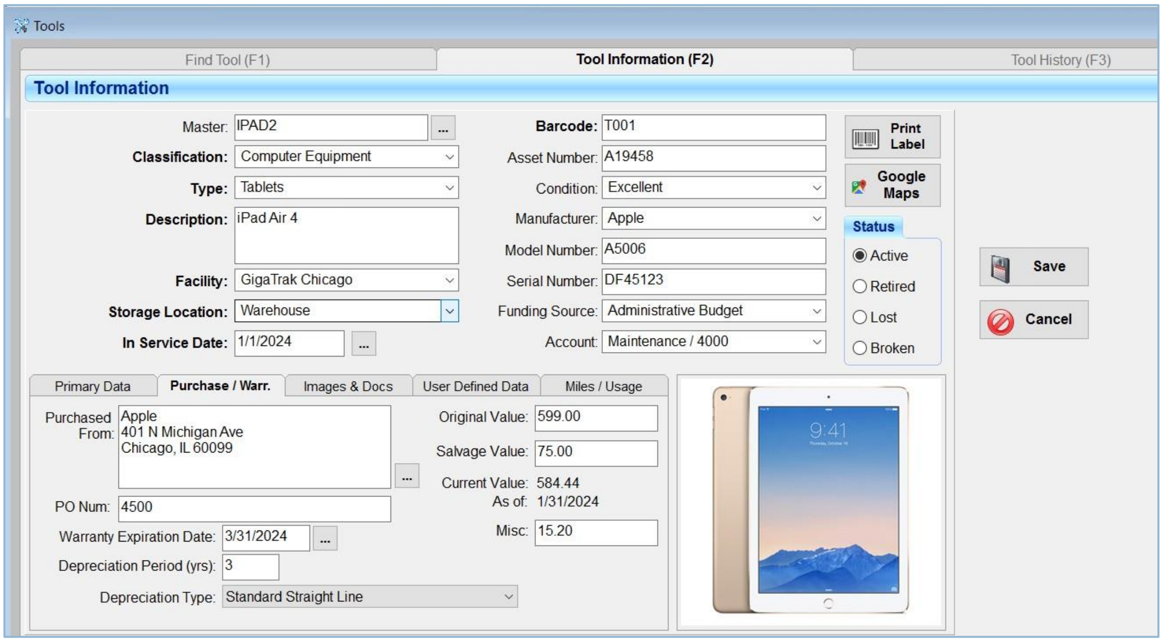
Click on the Tools icon and go to the F2 tab (Tool Information). Press "Add". Use the drop-down menus to pick the Class, Type, Facility, and Storage Location for the Tool. You will also need to enter in a tool description and barcode. All other information is optional. Press Save. Continue this process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

Example of an added Tool with the bare minimum information,



*New Tool added with only required **Bolded Fields**

Example of an added Tool with all information,

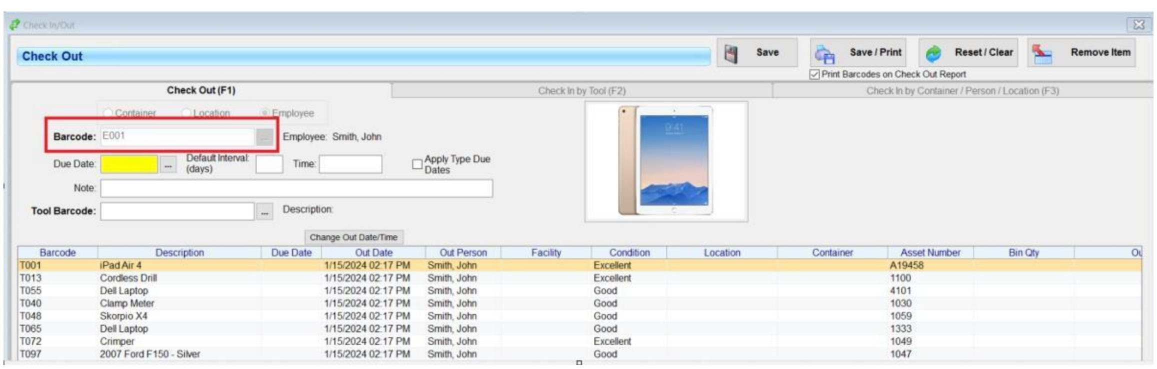


*New Tool Added using Bolded Fields and optional support fields. Reminder that only **bolded** fields are required.

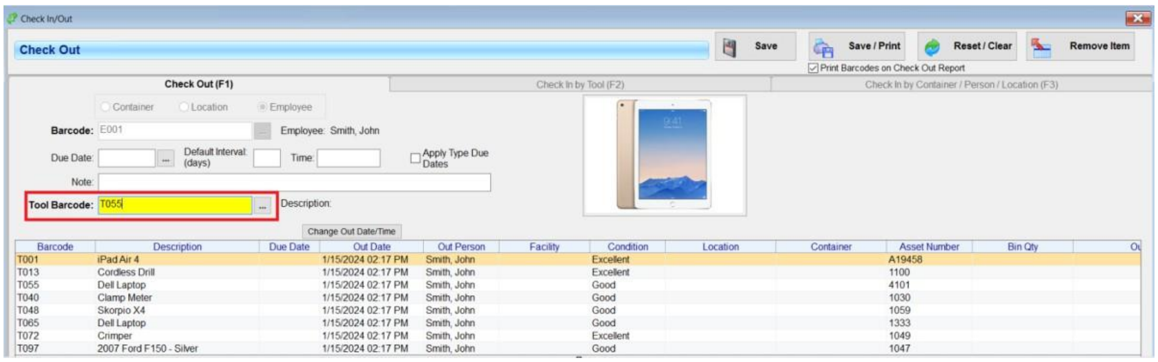
CHECK TOOLS IN/OUT

STEP 6

To move Tools from their home Storage Location to a person OR a checkout/usage location, you will perform a checkout. Go to the Check In/Out icon. The first tab is for checking Tools out. Using a corded or Bluetooth USB Scanner, you will first scan the Employee or Location barcode you would like to check a tool out to. If you do not have a scanner, you can also enter the barcode manually with your keyboard.

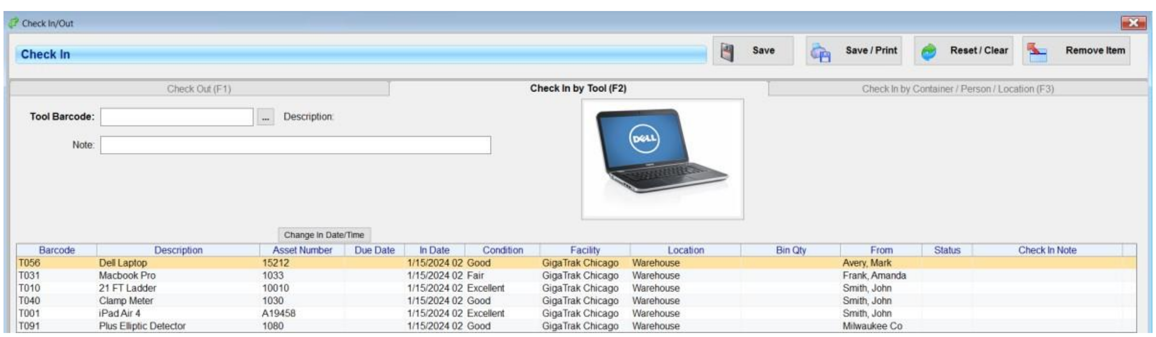


Next, move the cursor to the “Tool Barcode” field and scan or enter the barcode of the tool(s) you would like to checkout. Press enter after scanning or entering each tool barcode to move it to the grid. (some scanners may automatically perform an ‘enter’ after scanning). As each tool gets entered, it gets moved to the checkout grid.

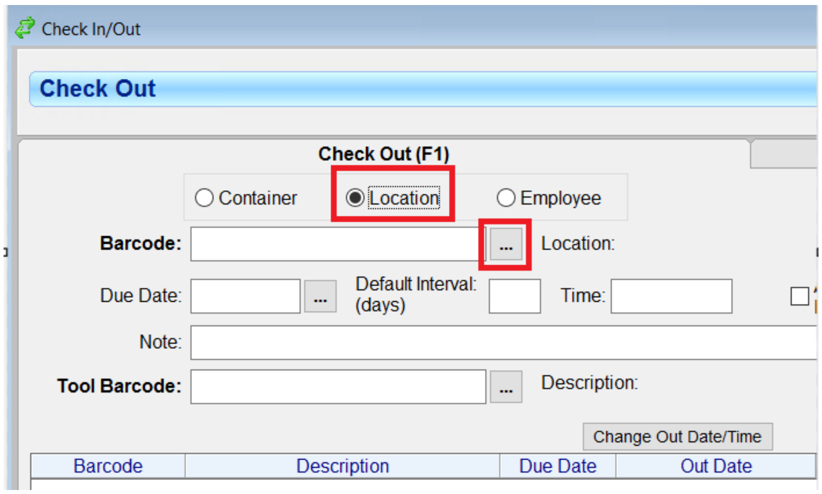


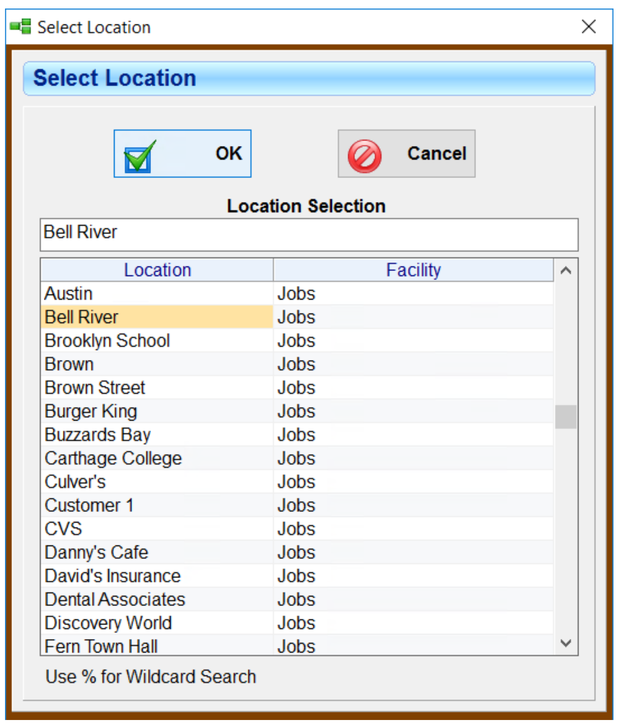
Finally, press “Save” or “Save/Print”.

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. As each tool gets entered, it will appear in the grid. Once all tools have been scanned, Press “Save” or “Save/Print”.



A similar process can be performed when checking tools out to a location (checkout/usage location). Furthermore, if you don't have actual barcodes to scan, barcodes can be looked up by clicking on the … (ellipses) box next to each field. In the example below, we are checking items out to a jobsite. Since we don't know the jobsite barcode, we are going to click on the …. Box to choose a jobsite from a list.





The same process can be done by clicking on the … Box next to "Tool Barcode" and you can choose a tool from the list.

REPORTS

STEP 7

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. The word Assignment means checked out right now. Tool Assignment by Employee and Tool Assignment by Location are the most popular reports depending on if you are checking out to Employees or Locations. 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".

To view a report, highlight from the list and press "Print Report". This will not immediately print it but rather show a preview. Once the report is pulled up, you can Print it, Save it as a PDF, or email it someone. Furthermore, from the report list screen, you can export a report to Excel by highlighting the report and press "Export Report to .xls File".

Overview/Icons

STEP 8

Master Icon – Optional feature where you can create Master Templates for commonly purchased Tools. This feature is used for data consistency when entering in new tools.
Tools Icon –
F1 Tab – List of all your Tools. Any filter can be used to narrow down the list to look for specific items. Any tools left in the grid can be printed or exported.
F2 Tab – Specific Tool details on one individual Tool (whichever Tool is highlighted on F1). Here, new Tools can be added, viewed, edited, or deleted (if the delete button is turned on in the Setup Options).
F3 Tab – Specific Tool History on one individual Tool (which Tool is highlighted on F1). History can be narrowed down by date filters or records to display. History records in the grid can be exported or printed.
F4 Tab – **Pro and Contractor Editions Only.** Specific Tool Maintenance on one individual Tool. The first tab allows you to start Maintenance on a Tool. The second tab lets you view Maintenance history on a Tool or Edit records. Scheduled Maintenance is first setup under Support➔Tool Support Administration➔F4 Maintenance tab.
Check In/Out Icon – On the first tab, you can check Tools out to a Container, Location, or Employee. On the second tab, you can check a Tool back in by entering the Tool barcode. On the third tab, you can check a tool back in by a Container, Location, or Employee as a whole.
Reports Icon – Over 40 canned reports in the system that can be ran at any time.
Please note that you cannot access the top drop down menus (File, Support, Labels, Help) if you are currently in any icon. You must first Exit out of the icon so that you are on the Home GigaTrak screen. Once on this screen, you will have access to the top drop down tabs. Only one window can be open at a time.