

TRAKKER

Asset Management Tracking Software 

TRAKKER Asset Management and/or Equipment/Tool Tracking Software

Administrator Technical Guide

Please note that until registered the '*TRAKKER*' program use is limited to 30 days for evaluation purposes

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Software Protection

When software is purchased and unlocked from the 30-day trial use the software is 'fingerlocked' to the specific computer it was registered to. You are free to move it to another computer BUT first you must follow a series of steps to remove from initial computer. See 'Activation' details for full explanation.

Guide to obtaining best results from Administrators Manual

It is important to understand why so much information is provided **AND** that a lot can be ignored or skipped over if you won't need a particular function.

If you want to use some functionality and not others you can. If you want your input screen or view of data to look differently then we show you how to do that. It simply isn't possible to get each of you the exact and right 'solution' to your asset management unless we let you do modifications and make choices to suit your situation.

You have some thinking, planning and execution to do. Once you've done that the finished program is straightforward and easy to use.

If you think a DIY setup is too difficult we can put you in touch with a VAR/Facilitator who will charge you to do the tweaking and modification you need. Our intention is that a few hours of your input results in a very custom program that would otherwise cost thousands.

First step we suggest is to, print off for reference Addendum #3 at rear of manual using it to select and perhaps change the names of data fields you'll want to use.

In reading the Administrator's Manual we tried to describe operations in an order to impart knowledge and not always step by step. We suggest reading the manual while working with the 'trial' data and 'template' we provide within our program to get comfortable with the software.

Note: Some parts of the manual will involve things you probably will not implement or use in your 'solution' for example perhaps the following 'addendums'.

1: You may be setting up a 'solution' for your company and be the only one accessing and using this software. In this case you can completely ignore the '**Addendum #6**'. If giving 6 people access to the software you'd likely be giving specific access levels.

2: If you don't want or need a high powered system of tracking equipment in and out then ignore '**Addendum #5**' and just use a simple 'assigned to' field to keep track of who has what.

3: '**Addendum #2**' explains a very special kind of sorting/filtering function. You might want to look at it someday as it's a powerful feature for complex situations but 95% of you won't ever use it.

General guideline to a simple fixed asset management.

We can't stress enough that some time spent planning what you'd like to accomplish is worth every minute.

You can always change or add details later but collecting and inputting the right asset information from the start saves later returning to add one extra bit of information. We don't want you to do more work than necessary and entering asset information can be time consuming, limiting the number of fields/column headings is a good idea. Just keep in mind that an extra column, or field, might make later sorting or 'drill down' to view asset information in a useful way.

Gathering your Asset Information

How you perform this step depends upon your situation. In our discussion we assume you do not have existing asset information in an existing excel spreadsheet or other format as if you do then you'd be importing that data to save time.

Some steps you will take are the same no matter where you start from while some steps discussed might not be applicable to your situation.

Starting your Asset Listing and Numbering from Scratch

This does have advantages because you're not stuck working with any inherited system. Of course it's more work than just import existing asset information

Collecting asset information is work. Getting this information into AssetTrakker, accurately, with as little work as possible would be nice. Thinking about and planning can help make this easier.

First work with AssetTrakker to setup the program the way you'll want it once all your asset information is input and practice with test data to become comfortable with how it works.

Next you are going to create data sheets that you will have people write in information about assets under their control. You might be the one doing the data collection, **OR**, my preference, give it to each department, or manager and have them do it. They are the one's using these assets and it helps reinforce that someone is in charge of these company assets. After all the data is input you'd give them a new printed off list of all the assets under their control.

Putting it together

Try and obtain some 'buy in' from the department or location manager with control over the assets. The closer to the asset you can allocate some responsibility the better that asset will be controlled, 'it's my department's asset' is more powerful an incentive than 'it's I.T. Dept's asset'.

How Many Assets?

Find out how many assets, that you wish to track, are in each Department, Location or Office by counting them **OR** getting the person responsible for care of assets to give you this count. This is easy and should take little time as no specific information is being collected.

Open an 'all asset' grid view, with all the 'fields' of data about assets you've chosen to track. Now arrange the columns/fields in the view where you want asset information written in. Set the column widths wide enough that written information can be input. Perhaps setup grid to have two rows for each asset for data collection purposes and save this 'custom view' for reference.

If you are collecting information by Department then put the Department column on left, If by Location then that would be on left.

OK we're getting there.

Asset ID Numbers (Barcode #'s)

Generate your asset id numbers (**barcode #'s**) for the Department, Location or Office.

Left click on 'Actions' Menu item and on 'Add Assets' or just click on the A+ icon. On the input form/window you enter the number of assets reported found in the 'first' Department or Location you are prepare data sheets for and the starting asset number assigned.

In the bottom of 'Form' enter into the box for 'Department, Location or Office' the name you want attached to the generated asset id numbers, leave rest blank and click on 'Begin'.

Repeat the above step until you have all the Departments or Locations etc. where assets are located and sets of barcode/asset id #'s.

Setting up Custom Views

Now you will be printing off the sheets for each Department or Location etc. and giving them out along with the asset labels/tags to apply to assets they will list. This gives us the opportunity to show off how AssetTrakker can make things easier and assist in accuracy.

Click on the small symbol/icon at the left of the Column Heading you are using (Department, Location etc.).

Choose custom from the drop down selection.

Leave first box at top left of window as 'equals'

In box to right of that type in the name of the first Department/Location/Office

Click on OK.

Now you have a 'custom view' of only those assets that that first 'department' will be entering data on. **ONE more step**, on top of the current 'view' window is a 'save view as button', left click on this and type in the name you want to save this view as so you can call it back up later to copy written information into database. Then click 'save view'.

Printing Worksheets

Now click on the second 'Printer Icon' for 'Print View' and print off the blank listing for the Department/Location/Office you chose.

Repeat this step for other Departments, Locations etc.. Since the last 'View' you used is still on the screen you'll click on 'Select View' at top middle of View Window and small down arrow beside box to call back your 'All Assets View' to work with.

Entering written asset information into the Database

So your co-operative managers have done everything you've asked and the written sheets are in your hands. Time to get all that information into your database.

You can enter in asset information by typing in information right on the open 'Grid Window' or you can use a custom input 'Form' you setup for this purpose.

Changing Data and Entering New Data

Editing a single asset in a open 'View' window

If you missed a field/cell when you added a record for a new asset or if some of the data for an asset has changed.

- Move the pointer** to the data field/cell that needs changing,
- Double Click** to enter Edit Mode
- Highlight** the data and
- Type in** the new data.

The change is saved as soon as you move to another field.

WARRANTY, LICENSE & PRIVACY POLICY

LIMITATION OF WARRANTY FOR TRAKKER SOFTWARE

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GOVERNING LAW: This Limited Warranty shall be governed by the laws of Ontario, Canada, excluding its conflicts of laws principles and excluding the United Nations Convention on Contracts for the International Sale of Goods.

SEVERABILITY: In the event any provision of this license agreement is found to be invalid, illegal or unenforceable, the validity, legality and enforceability of any of the remaining provisions shall not in any way be affected or impaired.

LICENSE:

The program is licensed for use on one or more computer workstations, a certificate, at time of purchase, is issued indicating the number of computer workstations licensed.

PRIVACY POLICY:

We maintain a database of all registered users. This database is not made available to outside firms. When purchasing this software a client information page is part of the purchasing process. Information gathered from you is secured in our registered user database and is used only for the provision of this software and to notify you of any upgrades or fixes that may become available.

We may from time to time make you aware of items that will enhance your productive use of the software.

We do not share your information with others, without your permission, except for the installation and service of this software as may be needed. Our Registered User Database is used to verify program validity, to issue upgrades and to generate unlock codes that might be necessary for our customers.

System Requirements

Supported Operating Systems:

Windows 2000 Professional Edition Service Pack 4 ; Windows 2000 Service Pack 4; Windows Vista; Windows XP Home Edition ; Windows XP Media Center Edition; Windows XP Service Pack 2; Windows XP Tablet PC Edition.

Windows Server 2003 R2 Datacenter Edition (32-Bit x86); Windows Server 2003 R2 Enterprise Edition (32-Bit x86); Windows Server 2003 R2 Standard Edition (32-bit x86); Windows Server 2003 Service Pack 1.

1. The program uses Microsoft .NET Framework extension and run time Microsoft SQL Server 2005 Express database. Some or all of this necessary Microsoft software may already be installed along with your computers operating system.
2. This program is licensed for use without charge for a 30-day evaluation period. Upon purchase an unlock number 'key' will be provided for use in 'activating' the software and remove the initial time limitation.
3. The setup wizard will run to install AssetTrakker and test your computer for the correct version of Microsoft.Net framework (dotnetfx.exe) and SQL Express files at install time. If needed, our program will install this framework as well as database software. ***It has been reported that occasionally, depending upon users workstation configuration, SQL Express may not properly be installed by our system and require manual installation. See FAQ on web site www.trackitsoftware.com**

If you choose not to install the .Net framework or SQL Express components you cannot open or use AssetTrakker.

4. You will need about 77mb of free hard disk space for the AssetTrakker program installation.
5. If the .Net framework and SQL Express components have to be added to your operating system, approximately 600mb of additional free disk space will be needed to install it.
6. An Intel Pentium processor or equivalent, with 256mb of memory, 512mb is preferred for operation.
7. Both 'ROV or Flic' scanners requires either a serial or a USB connection. A USB cable is available at addition cost; a serial cable is included with each scanner.
8. A supply of bar coded self adhesive labels can be obtained from www.polylabel.com or alternate supplier

Activation of Software

AssetTrakker Pro is downloaded and installed from our web site or from reseller supplied cdrom completely functional except it has time limited use for 60 days until purchased **and** Activated.

This software includes built in finger-locking. "Finger-locking" requires each computer our software is installed on to generate its own unique authorization request code that we use to prepare and issue a unique activation code to unlock the software. (removes initial limit of 30 days use).

Because we finger lock to a specific computer we provide for situations that might arise where the software is to be moved to another computer or the finger-lock becomes unstable and out of sync. Out of sync could occur if the user upgrades their computer or inadvertently changes a setting on their computer that finger-locking refers to.

Activation Process

The activation process is explained below. This may be slightly different for purchases made from an authorized reseller but the basic steps are the same.

1. The user must first purchase AssetTrakker Pro to obtain a serial number.
2. The user must then download and install AssetTrakker Pro, if they haven't already done so.
3. To activate the software, the user must select the "Obtain Activation Code" option and provide the "Serial Number" issued to them for their copy of the software. The user will press next and they will be given an "Authorization Request Code" which will be finger-locked to specific flag values obtained from the computer.
4. If 'Automatic Activation' is selected, rather than 'manual', the user is directed/taken to our web site Web Activator page.

Note: The user can call us to manually do this for them. In such case we will ask for serial number etc. so activation number can be issued.

5. Our activation process will display up-to-date information and the user then selects/clicks on the "Generate Activation" button. Once the user presses this button an activation code and a "Certificate of Ownership" .pdf file will be generated for the user.
6. The user then goes back to AssetTrakker and selects the "Activate Now" option. To unlock the software the user inputs the Activation Code provided and process is finished.

A Deactivation Process must be followed if moving software to another workstation. In the case of 'fingerprint' sync problem due to user changes of computer software or hardware the same steps are taken but started with a 'out of sync' warning popup.

NO DATA IS AFFECTED BY THESE PROCESSES

Deactivation process steps

1. The user selects "Deactivate License" option from the help menu.
2. If the user continues with the deactivation process, the program will deactivate the license and generate a 'Deactivation Confirmation Code'.
3. The user is then directed/taken to our web site Deactivation page.

Note: The user can also call us to manually do this for them. We will of course need the Deactivation code generated on the users computer.

4. On our web site deactivation page the software is verified as “deactivated”. The user is then prompted for their account user name and password before being able to continue. The Deactivation Confirmation Code is checked to be valid and the serial number marked as deactivated and available for activation again. An email will be sent to the customer’s account to and to ourselves to inform us of this action.
5. As the serial number is now available for activation, the user will be able to install and activate the software on the new computer or reactivate the software on the upgraded computer.

Reactivation Process

1. When the user launches our program that has been deactivated, they will be presented with a “Reactivate” software window. This window will describe to the user the conditions that are necessary in order to allow the user to reactivate the software. Much like the activation process, the user will be required to provide an active “Serial Number”. The user will press next and they will be given an “Authorization Request Code”
2. The user will be directed to the web site Web Activator page.

Note: The user can also call us to manually do this for them. We will ask for serial number etc. so a reactivation number can be issued.

3. On our web site activation page, the serial number is checked against the customer database. If the serial number provided exists and is not currently activated the user will be directed/taken to the Web Activator Generator page.
4. On the Web Activator Generator page the user is presented with the updated computer information and will press/click on the “Generate Activation” button. An activation code and a “Certificate of Ownership” .pdf file will then be generated for the user.
5. The user will then go back to the software and select the “Activate Now” option. To unlock the software the user inputs the Activation Code provided.

Finger-Lock Out of Sync Condition

In some cases the finger-lock will become out of sync, which in turn will result in the software activation no longer being valid. This can occur for several reasons but usually means that during startup, the users finger-lock value no longer matches the master finger-lock value.

1. The user will know if a “Finger-Lock Out of Sync” error has occurred because they will be presented with a window describing this situation and instructions on how to proceed. The user will press next and will be given an “Authorization Request Code” which will be finger-locked to the new flag values obtained from the computer.
2. The user will be directed to the web site Web Activator page.

Note: The user can also call us to manually do this for them.

3. On the web site activator page, the serial number is checked against the customer database. Out of sync recovery is only allowed twice for security reasons.
4. Next user will be directed/taken to the Web Activator Generator page where user is presented with the up-to-date computer information and must press/click the “Generate Activation” button. Once the user presses this button an activation code and a “Certificate of Ownership” .pdf file will be generated for the user.
5. The user then can go back to our software and select the “Activate Now” option and input the Activation Code provided.

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On Initial Start-up

Trakker requests user information, when the program is first run; to set-up an Administrative Access account (login and password). When AssetTrakker Pro is purchased and activated it is 'fingerlocked' to the specific computer that generated the authorization request code.

Step 1: Welcome

Step 2: Limitation of Warranty

Term of limited warranty is presented and has to be accepted.

Step 3: Enter your Company Information

You should enter the company information as this is used to register the program later, and may be used during report printing, etc. Entries are not required in all fields.

Step 4: Create Administrator Account

Sets up the Administrator account. Enter the Name of the person who is to have the Administrator access. This person will be able to access all functions of the program including deletion of assets and editing the details.

Step 5: Evaluation/Purchase/Activation

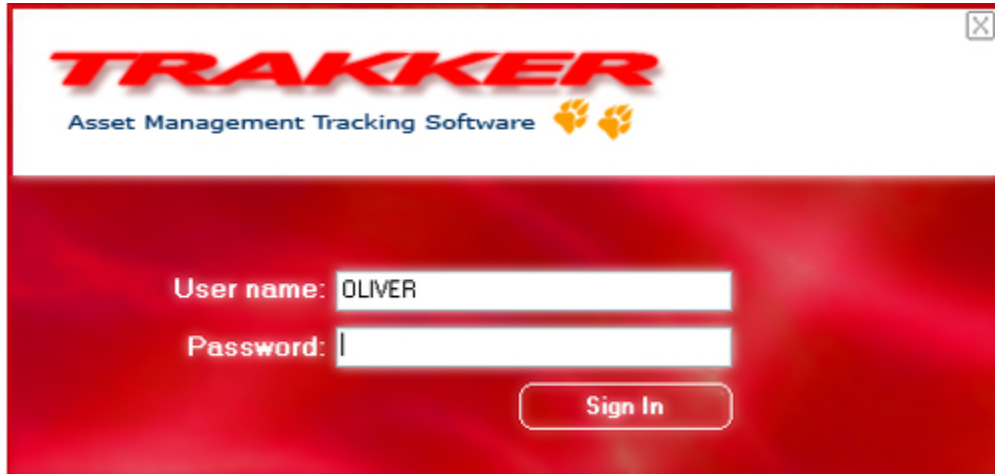
In this final step you will select whether to continue to use the evaluation version or take required steps to activate the software.

The above 5 screens are presented each time the program is launched until the program is 'activated'.

Program Login

The Program Login screen allows only a user with the proper login password to access the program.

When AssetTrakker is first installed you, as Administrator, set your user name and password. The Administrator manages the log in and can grant various access levels to others through use of the 'System' Menu drop down choices, see [pg. 42](#) and [Addendum 6](#)



- Enter** your User Name
- Right Tab and enter** your password
- Right Tab and press** 'enter', or click on 'Sign In'.

TEMPLATE = Your Custom Program

The ability to import, save and switch between 'templates' can be a powerful tool.

When you initially run AssetTrakker what you see is actually a 'template' with a certain number of column headings chosen by us as well as certain views of the data screens and entry forms with some data to work with. This setup might be close to what you want or we may have another sample 'template', available from our web site (these are being developed by ourselves and end users), that would be even closer. You will likely make your own changes as it's easy and save your resulting 'template', perhaps to pass on to someone else, or just for your own use. You might even want to use several different 'templates', switching between them for specific control.

If you are installing AssetTrakker on a number of different workstations you'll use a Template to setup each workstation from your initial 'master' setup.

Template importing and saving is easy to do and is explained in detail. See: [Templates](#)

Keyboard and Mouse Use

We have followed as much as possible the same mouse/keyboard use you will find in Microsoft® programs. Left click (on mouse), double left click, right click (in cells), 4 way scroll pointer (accessed by pushing down on mouse scroll wheel) are all used.

Keyboard keys such as; Arrow, tab, ctrl, space can be used in different ways to move and access functions. They might seem difficult on first use but can speed things up for you.

There are special mouse and keyboard controls available to speed various tasks. You'll find everything explained in detail in [Addendum #1](#) to this manual. You can print these off for reference until you're familiar with the one's you are likely to use.

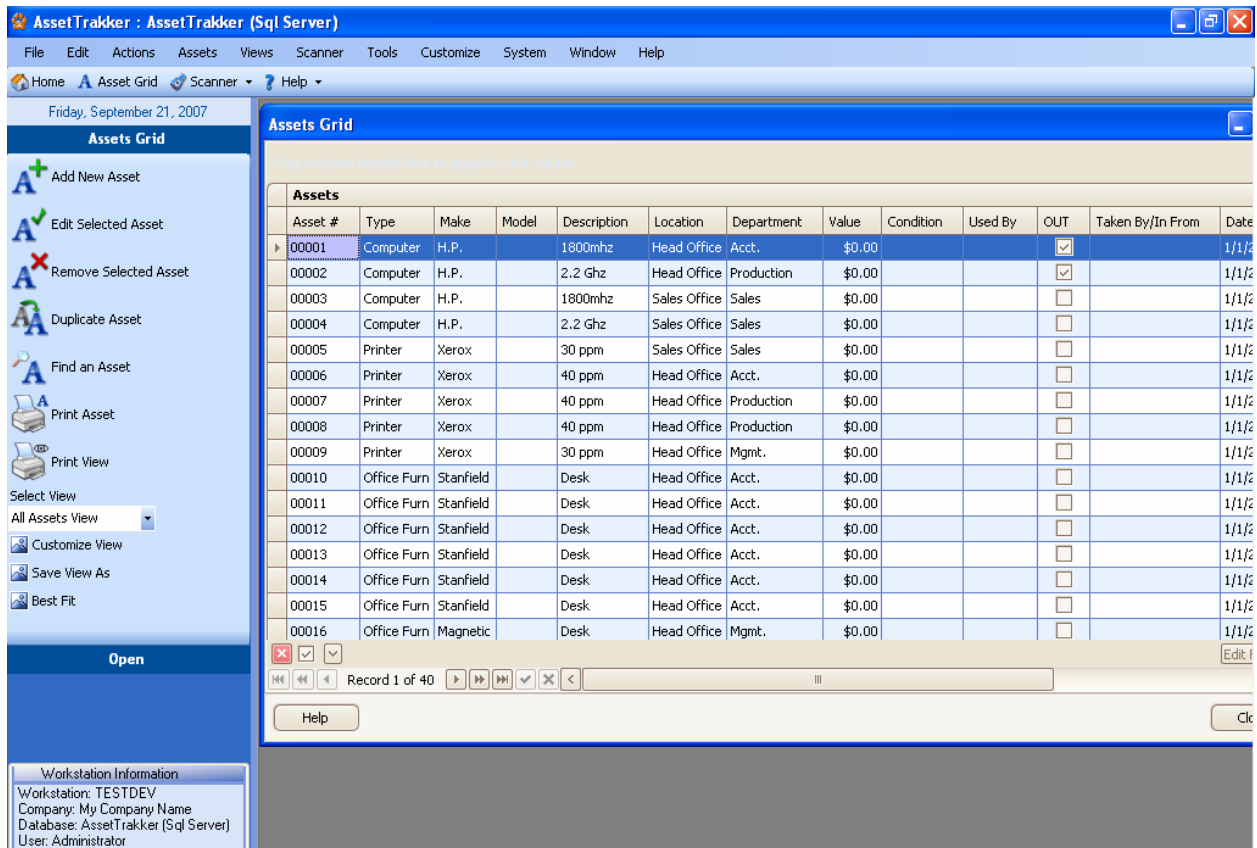
Grid Window

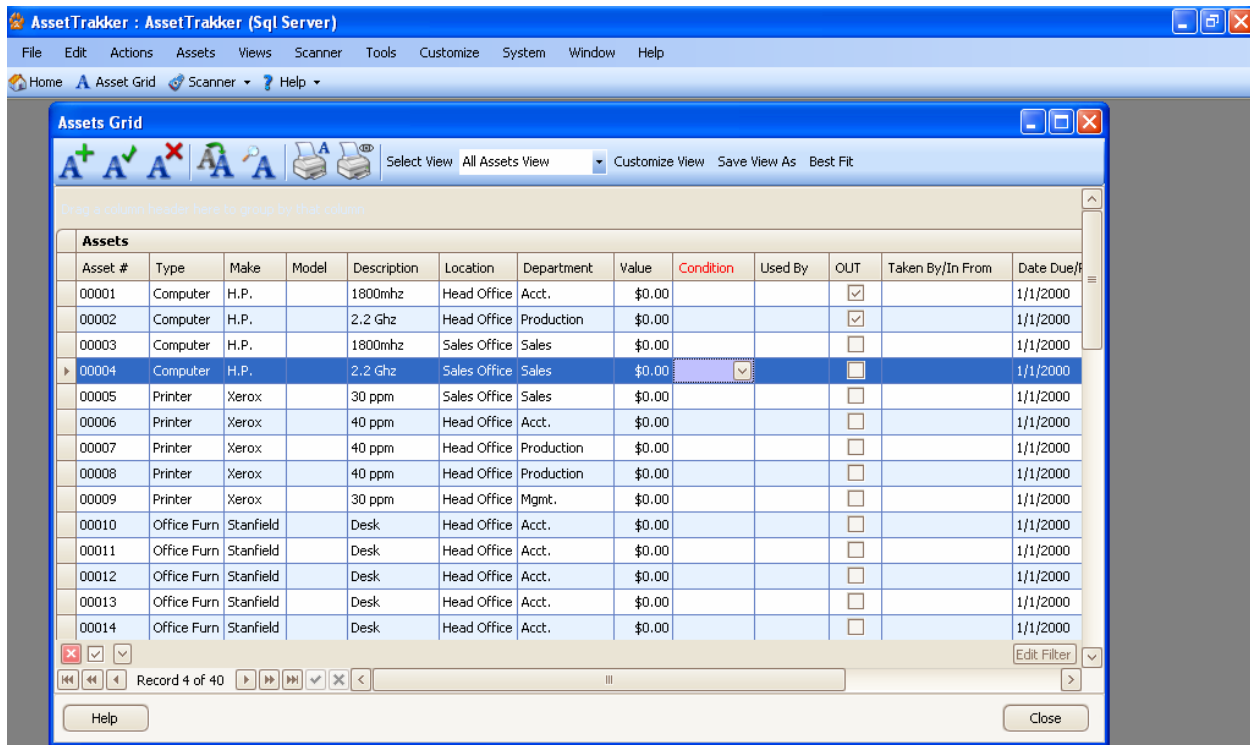
This is your main Program Window, the desktop and one you'll be using the most. It has the usual look of a Windows application with a Title Bar, a Menu Bar, an Icon Navigation Bar, and a Status / Information Bar showing the status of the scanner at the bottom. We discuss this in depth after outlining a few other areas you should know and consider prior to exploring all the modifications and uses this Grid Window can be put to.

The screen shot shown below shows how the Grid Window will look when you first open AssetTrakker, that is with an 'Options' panel on the left and the 'Asset Grid' window on the right.

Some of you will want to keep this 'options' panel open while others would rather have everything accessible from just the 'Asset Grid' window.

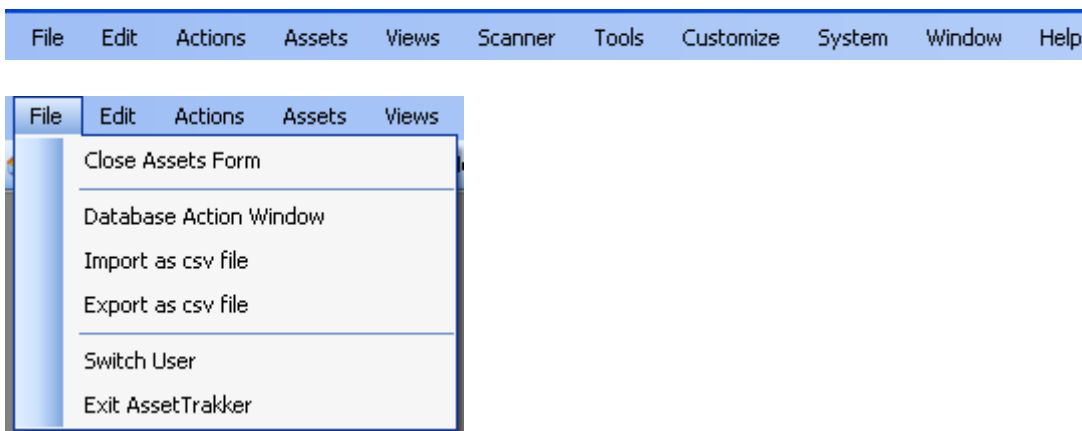
To reduce screen shots and the size of this manual we show program screen shots with side panel closed. Below are two screen shots of same 'view' one with side panel and one without. A Full description of 'Grid View Window' is found here [Program Window](#).





Menu Bar

The Menu Bar acts as other Windows based programs do. Left click on an item and a sub menu is revealed.



On following pages are explanations of the menu bar items and the drop down action items associated with them.





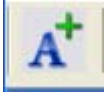






MENU OPTION	COMMANDS	ADDITIONAL NOTES
FILE	<ul style="list-style-type: none"> • Close Assets Form • Database Action Window • Import csv file • Export as csv file • Switch User • Exit Asset Trakker 	<ul style="list-style-type: none"> • Closes open 'Asset Listing' Window • Opens window to access database functions; Open, Create New, Add Db to list, Save As. • Used to import existing records into a database structure for program use. • Export the current database to a .CSV file for manipulation by another program. • To change from one user to another. • Exits the program.
EDIT	<ul style="list-style-type: none"> • Cut (ctrl-x) • Copy (ctrl-c) • Paste (ctrl-v) • Clear (del) • Select All (ctrl-a) 	<ul style="list-style-type: none"> • These are all self-explanatory and work similarly to those found in other Windows programs. • *Only a single cell may be copied pasted within the grid view. Multiple and single rows may be cut/copied pasted into other open programs.
ACTIONS	<ul style="list-style-type: none"> • Add Assets • Edit/View Asset • Duplicate Asset • Print Asset • Quick Find 	<ul style="list-style-type: none"> • Add an asset(s) or asset numbers by using an Add Asset Window to input information. • Edit the currently selected asset via the Edit Asset Window or use window to review individual asset particulars. • Duplicates selected items when adding a number of identical new assets. • Prints the currently selected asset information. • Search for a specific asset by scanning (or typing) the barcode number in.
ASSET	<ul style="list-style-type: none"> • Open Asset Grid 	<ul style="list-style-type: none"> • Opens an Asset Grid View of your assets
VIEWS when 'Asset Grid' window IS open	<ul style="list-style-type: none"> • Use Current View As Default • Save Current View As • Print View • Refresh View • Customize View • Export View 	<ul style="list-style-type: none"> • Sets the opened view to show on start up. • Saves the current view and allows it to be named differently. • Opens the print preview screen. • Refreshes View . • Launches the Customize Grid Window. Very Important, here you set up what fields/column headings are shown on a view. • Opens the Export window.
SCANNER	<ul style="list-style-type: none"> • Configure Scanner • Quick Find • Quick Add • Batch 'Add' Assets • Batch 'Edit' Assets • Batch Scans History 	<ul style="list-style-type: none"> • Configuration of Scanner. • Calls up Form with details of asset scanned. • Edit window for asset # scanned. • Download batch scans with common predefined fields. • Download batch scans into window for edit and review purposes. 'Entry forms are used for things such as 'Auditing'. • History of Batch Scans done.
TOOLS	<ul style="list-style-type: none"> • Check Leases / Warranties 	<ul style="list-style-type: none"> • Launches the Check Service Agreements / Warranties Expiration Window.

CUSTOMIZE	<ul style="list-style-type: none"> • Lookup Tables • Fields selection • Forms Customization • Show Options Panel 	<ul style="list-style-type: none"> • A tabbed window shows the tables for editing, printing and updating data that you can change. • Selects fields for use. Edits field names. • Enables the customization of Data Entry forms used by the system. Edit existing forms, add new forms or delete forms not needed. • Turn side 'options' panel on/off.
SYSTEM	<ul style="list-style-type: none"> • User Lists • User Roles List • Backup System • Restore from Backup • Save System Config. Settings as Template • Open a Template to replace System Config. • Barcode Settings • License File 	<ul style="list-style-type: none"> • Opens a list of users and ability to add users and set security limits. • Sets security limits for classes of users. • Prepares a .zip file backing up the program in a location you choose. • To restore files from a backup folder OR location path you set to obtain saved files. • Creates a file of your configuration settings. • Replace current configuration with saved 'Template' you might have earlier saved or one you download from our web site. • Window used to set barcode# format. • To edit Company information.
WINDOW	<ul style="list-style-type: none"> • Close All • Open Windows List 	<ul style="list-style-type: none"> • Will close all active windows. • List of currently opened windows.
HELP	<ul style="list-style-type: none"> • User Manual • Online Support • About • Check for Updates • Deactivate License (required step in move to new computer or computer upgrade) 	<ul style="list-style-type: none"> • Access the User Manuals. • Support redirects user to our Forum and Help Desk Section of our web site. • Information about Program Version. • Uses internet to check and automatically update program files. • To deactivate the license and generate a Deactivation Confirmation Code that is proof of deactivation.

Icon Navigation Bar

The Icon Navigation Bar is a collection of access icons that will allow the user to quickly access the most commonly used commands and windows. The Icon navigation bar consists of two sections.



ICONS		NAVIGATE TO:
	<ul style="list-style-type: none"> • Home Icon 	<ul style="list-style-type: none"> • Home Page icon will close all windows and display the home page.
	<ul style="list-style-type: none"> • Assets Icon 	<ul style="list-style-type: none"> • Launches the Asset Grid Window.
	<ul style="list-style-type: none"> • Scanner Icon with drop down selector icon <p>Quick Add</p> <p>Quick Find</p> <p>Batch 'Add' Assets</p> <p>Batch 'Edit' Assets</p>	<p>Quick access to commonly used items. Also found under Scanner Menu Item.</p> <ul style="list-style-type: none"> • Calls up Form with details of asset(s) scanned. • Edit window for asset # scanned. • Download batch scans with common predefined fields. • Download batch scans into window for edit and review purposes. 'Edit Forms are used for purposes such as 'Auditing'.
	<ul style="list-style-type: none"> • Help Icon with drop down selector icon 	<ul style="list-style-type: none"> • Allows user to select items that are also listed in the Help menu bar option.
	<ul style="list-style-type: none"> • Add Assets 	<ul style="list-style-type: none"> • Opens an Asset Entry Form for adding one or more asset numbers and with or without details.
	<ul style="list-style-type: none"> • Edit Asset 	<ul style="list-style-type: none"> • Opens an Asset Entry Form to allow changes to the details of the selected asset record.
	<ul style="list-style-type: none"> • Remove Asset 	<ul style="list-style-type: none"> • Deletes the currently selected asset record.
	<ul style="list-style-type: none"> • Duplicate Asset 	<ul style="list-style-type: none"> • Allows the entry of several identical assets or very similar assets. Uses current open view fields.
	<ul style="list-style-type: none"> • Search Assets 	<ul style="list-style-type: none"> • Searches the database for a selected asset number and opens the Edit Asset form.
	<ul style="list-style-type: none"> • Print asset 	<ul style="list-style-type: none"> • Opens the Print Window with the selected asset details for formatting and printing.
	<ul style="list-style-type: none"> • Print View 	<ul style="list-style-type: none"> • Opens the Print Window with the current view for formatting and printing.

Selection of Column Headings/Fields

You choose the column headings (data fields) you want and can easily rename one's we preset to make them work best for your situation. Your selections appear in the grid, if you selected them/made them active. We discuss and provide worksheets to help in making your selection in the next few sections but wanted to right up front give you an idea why this is so powerful and important a feature.

Since you can have many different 'custom views' of 'data' we make it easy to select which 'fields' you want to appear in a specific 'custom view'.

You can also temporarily eliminate/hide fields/headings to simplify a view. Data is not lost when you hide a column heading, it is still there and accessible just by making it visible with a click or two.

Altering 'views' or setting up a few custom views and saving them, with a name that indicates the view's purpose, is a powerful function. For example, you could have a view used to organize columns and data associated with *leased items*. You might setup custom views just to print monthly information since reporting is based on wysiwyg.

What do you need to track?

Collecting and entering asset information is a time consuming part of setting up an asset management program. Choosing what asset information to track and record requires careful thought as it effects the implementation of asset control and the amount of work required. The **TRAKKER** Asset Management software allows for tracking with a lot more detail than you may require. Many fields or column headings are available for you to use to ensure that you can customize the program to your own needs. Limiting the number of fields used will make your entry of data easier.

We have provided **worksheets** to help you decide which column headings you must have and investigate those requiring more thought. Not all of your assets will require the same detail. These are located in **Addendum 3 [Column Headings Selection Worksheets](#)** and we suggest you print them out.

Each column heading or field can be sorted on and combined with other headings to obtain custom views. '**TRAKKER**' software is configured so that at any time in the future you can call up column headings you have hidden or generate new ones should their use be needed.

Column Headings / Data Fields

To assist you in deciding which columns you will want to set up, below is a list with notes on their likely use and details about their format. When you initially open AssetTrakker we've preset those most commonly used to be 'active'.

Asset #:	The key identification reference used to track assets. They can be straight numbers or a number with an alphabetical prefix. (0001 or A001). This number is used for audit purposes and for cross-reference. If assets were identified by a number tag (no barcode) this is where the number would be entered. ' TRAKKER ' provides a method to automatically generate the number sequence you choose. (This is a text field).
Make:	The maker's name. A text file type.
Model:	An important piece of information when arranging service or buying parts. Might be of use when one might want to group by model type. (text field)

Serial #:	Essential for specific asset identification. Likely needed when making warranty or insurance claims. (text field)
Cost to Repl.:	This gives an estimate of the cost of replacing an asset. This is needed for planning risk assessment and for insurance purposes. (decimal number field)
Cross Ref. #	Could be useful to reference other asset number(s), tie together a group of assets or reference an item number from another system, such as an accounting system.
Vendor:	Useful if something breaks or has to be replaced and you want to quickly purchase a new one. It is a column you might do without since your purchasing department already knows where to source replacements. A lookup table is attached; see Speed up Data Entry with Lookup tables.
Asset Type:	Although we see this as being used in a similar way to as used by accountants, it can be used for a general grouping such as furniture, computer, shipping, etc. A look up table attached: see Speed up Data Entry with Lookup tables
Condition:	This is useful to see what is likely to require replacement or decide on service needs. This has a look up table.
Description:	This adds detail in addition to make, model, and serial number. (text field)
Memo:	This allows for the collection and display of more information about the asset. For example, if it is a computer you might want to list details of the hardware configuration or even the programs installed on it. (A text field)
Department:	The department using the asset. This is helpful for listing assets by department to assist with an audit. This has a look up table.
Location:	Building/department/division etc. Good field to have so that a search/sort can give you a clear overview as to where assets are located. This has a look up table.
Used by:	Necessary if you have assets in the personal possession of an employee who may have these assets off business premises. This has a look up table.
Date Assigned:	Useful if assets are moved around or for telling how long an asset has been at its current location. (Only date entry allowed, drop down calendar provided)
Expected EOL:	The anticipated date when the asset will no longer be useful. (Date field)
Funded by:	Source of funds if provided by Bond Issue, outside funds (loan) or a grant. (Text field)
Cost:	Total cost of acquiring an asset. (This is a number field type and decimals are allowed)
Date Acquired:	It gives some idea when replacement might be required. (Only a date entry is allowed. A drop down calendar is provided)
Disposed:	Indicates that an asset has been disposed of. Check Box <input checked="" type="checkbox"/> indicates Yes
Disposed Date:	Date asset was disposed of. (Only a date may be entered. Drop down calendar provided)
Business Use %:	Used if an asset is not used full time by the business to break down asset use. Not for everyone but a field that imagination might find an indispensable use for. (This field requires a whole number entry, no decimal)

OUT?:	Used for Tool/Equipment Tracking, YES/NO type field (if Yes then asset is out).
Taken By/In From:	Used for Tool/Equipment Tracking to indicate who is taking or returning item. Has 'look up table' attached.
Date Due/Returned	Used for Tool/Equipment Tracking to show when an asset is due back.
Recovered Value:	Net proceeds of the disposal of an asset.
Disposed Detail:	Notes on how and where an asset was disposed of. (A text field)
Warranty?:	Indicated if asset is covered by a warranty or could be used if covered by a service/maintenance contract. Check Box ✓ indicates Yes. Do not rename – System use.
Warranty Expiry:	It is useful to see what expiries are approaching, for tracking maintenance or service agreements. Helps prevent paying for service covered by warranty as well as prompting the repair of items before expiry. (A date field type). Do not rename – System use.
Image:	Can assist in asset identification or where 'look' is an important feature. Also may help with insurance. (An 'Image' type field)
Value:	Could be the value that the asset is insured for. Needed for risk exposure control. (A decimal number field)
Leased:	Check Box ✓ indicates Yes. Do not rename – System use.
Lease End:	Used to warn when assets have to be replaced or the lease has to be renewed according to the terms of the lease. (Only a date may be entered, drop down calendar is provided) Do not rename – System Use
Lease Start:	Commencement date of lease on leased equipment. (Only date entry allowed). Do not rename – System Use.
Audit Date:	This column records the date the batch scans of assets were made for audit purposes. This column must be present to use the Flic scanner for auditing. If no scanner is used you might still wish to keep this field and manually input the date the asset was last seen. (Only a date may be entered, a drop down calendar is provided).
Auditor:	Record the name of the person who performed the audit. (A text field type)
Audited At:	Where asset was when audited. (A Text field)
Assigned To:	Person in charge of asset (A text field with lookup table)

Custom Column Headings you can set up

In addition to the 40 already named column headings/data fields, there are 29 additional column headings/data fields provided that you may name and use for any special situation or purpose. Later we will show you how to access and change the name of column headings/fields should you wish to do so.

5 are Currency type fields

9 are long integer fields for whole numbers

2 are Date field types

9 are memo or text fields

4 are Yes/No (True/False) field types (Boolean) Check Box ✓ indicates Yes or True

*Additional Boolean fields will be added in future update releases

***User Defined 'Boolean' fields**

These are a special type of fields that will be familiar to programmer and database people but the rest of us need a bit of an explanation in order to use these. You can think of these as YES/NO, TRUE/FALSE, IN/OUT or a number of other ways. A Boolean field only accepts a check mark as an entry. Checking a box means one of the states you are using it for is 'in effect' and if not checked then it is 'not in effect'. For example, if you are using a Boolean field to indicate that an asset has a particular attribute (ex. is under warranty) then you would name a Boolean field 'Warranty'. If this field is checked then the asset is covered under warranty, if it is not checked then the asset is not covered under warranty.

By using a number of Boolean fields to indicate asset attributes you can do some extensive sorting and filtering to create custom views.

Hint: Asset information can be viewed in many different ways just by sorting on a column. This is a simple, direct way to quickly obtain information on assets. Remember this when deciding to set up a column heading for a specific type of asset information. Want to see assets in various locations? With a location column heading active you can sort on a location as well as linking this column heading with others to get very specific views of assets.

Hint: If you end up with a large number of columns, some of which might need referring to only once or twice a year, put these columns off to the right, you can move them to the left for easy viewing and manipulation when you wish to do so.

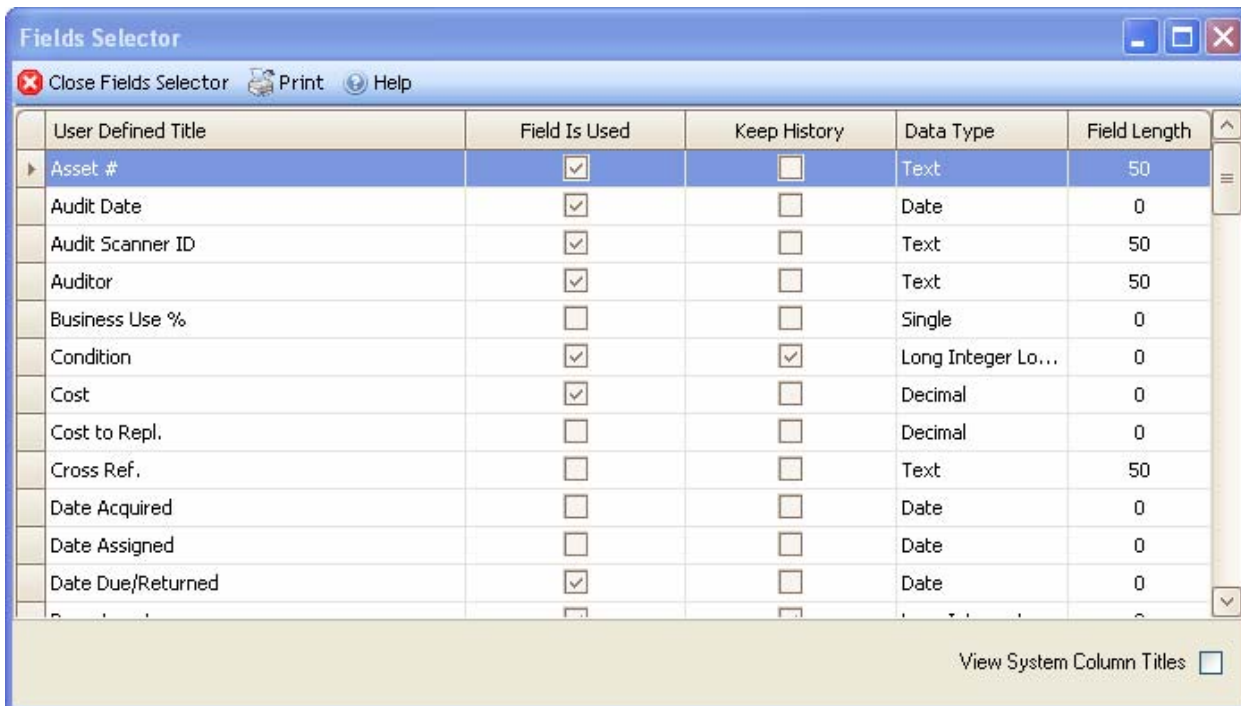
Note: If possible, barcode numbers should be no larger than necessary.

Activating your Column Headings/Fields

Having decided which fields you will be using, you need to select them for use. *Note that the process of field selection and renaming does take computer-processing time. The changes/selections made have to be added into the database structure and computer controls. Access to program may not be available for a few minutes while these internal actions take place.

Left Click	'Customize' in the Menu Bar
Select	'Fields Selection' in the menu
Select	the fields you want to show and use.
Choose	from the list column headings desired. You can change the 'field name' that will appear by typing over the current name that shows under 'User Defined Title' column.
Left Click	the box to place a ✓ in the Field Is Used column to activate the fields so it will be available on your display of data.

Note: Changing the Name of a field does not change the type of field (Date/Memo/Text/Integer). You have a limited number of fields/column headings with associated 'lookup tables' which are very useful. These can insure correct entry of data, for example 'Compaq' not 'Compac' as Make of computer.




To Change a field name

Left Click in the 'User Defined Title' field.

Change the name. The usual text edit functions can be used

Move the cursor out of the field and the change is saved

Pay attention to the Data Type; do not use a date field to hold text or currency information.

Click  **to finish.**

Note: *clicking on the 'View System Column Titles' will cause another column to appear with the actual heading names used internally by the program. Unlikely you'd ever require this information.

Setting up the Audit Trail (Keep History)

You may wish to track changes made to some fields, such as Assigned Department, so that an audit trail can be maintained.

Left click on the box in the Keep History column to include the field. With the field will have history details kept and with (blank) it will not be kept.

Adding Images to Assets Record

To add images the 'image field' has to be selected and made active. The images must be either a bitmap, gif or jpeg file type. You will not wish to use too large an image file size as these would take up a lot of room in database. We recommend that you download a free Microsoft program for converting image files into a more compact size.

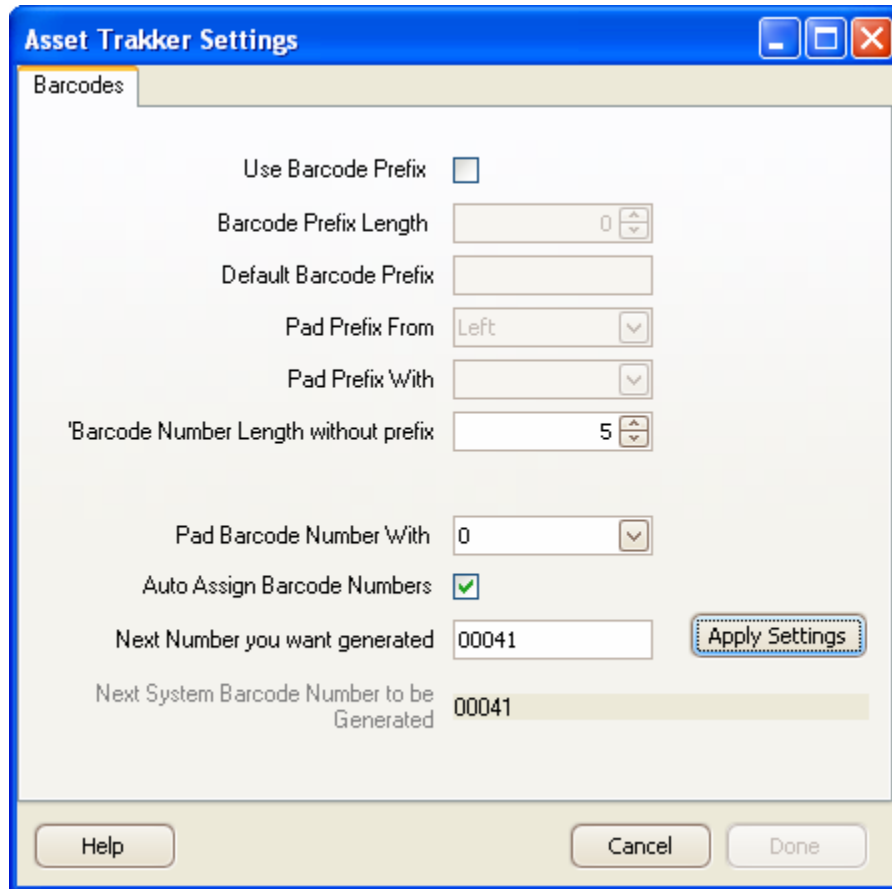
<http://www.microsoft.com/windowsxp/using/digitalphotography/learnmore/tips/eschelma2.msp>

X

Selecting/Setting Asset ID#'s (bar code #'s)

Setting up your sequence of numbers for assets (bar code numbers) has to be done correctly. Changes to the chosen format later could cause problems in certain program operations. You have to consider how computers handle numbers.

Go to the Menu item 'Systems' and click on 'Barcode Settings' the following screen appears:



The screenshot shows the 'Asset Trakker Settings' dialog box with the 'Barcodes' tab selected. The settings are as follows:

- Use Barcode Prefix:
- Barcode Prefix Length: 0
- Default Barcode Prefix: (empty)
- Pad Prefix From: Left
- Pad Prefix With: (empty)
- 'Barcode Number Length without prefix': 5
- Pad Barcode Number With: 0
- Auto Assign Barcode Numbers:
- Next Number you want generated: 00041
- Next System Barcode Number to be Generated: 00041

Buttons: Help, Cancel, Done, Apply Settings

You are presented with a number of choices and it's at first glance a bit intimidating. This is because we accommodate as many existing asset numbering formats as possible. The computer takes these settings into consideration when sorting and dealing with asset id numbers.

For most users all you'll have to do is to enter the number of characters of your asset id number into the 'Barcode Number Length without prefix' box. In the 'Next Number you want generated' box, you would put the next generated number for your asset id. For example if your last asset is numbered 0040 then you would enter 0041 here.

Use Barcode Prefix: Only use if using a 'Barcode Prefix, most of us will not. If you don't then skip to the 'Barcode Number Length without prefix' box.

Barcode Prefix Length: If you chose to use a 'Prefix' then here you enter how many alphanumeric characters you wish to use.

Default Barcode Prefix: Here you would type in the 'Prefix' characters.

Pad Prefex From: This setting only applies if the 'Use Barcode Prefix' box has been checked. This is used, along with the 'Pad Prefix With' box, to have the program automatically pad the barcode number with a prefix from the left or right.

Pad Prefix With: Here you chose whether to pad the 'Prefix' with either a letter or a single digit number.

Example: You may have some of your assets labeled ABxxxx and some labeled Bxxxx. You would set the prefix length as '2' with a default prefix of 'AB'. This would insure that adding a new asset will automatically follow the correct barcode format of ABxxxx.

By setting the 'Pad Prefix From' to 'left' and setting the 'Pad Prefix With' to 'A', the assets labeled with the barcode format of Bxxxx would be padded with A from the left.

Barcode Number Length without prefix: Everyone must fill in this box with the total number of characters to be used in their barcode/asset id number sequence. 1234 equals 4 as does ABC1, 00001 equals 5 as does 10234, a prefix of AB and number series of 0001 equals six.

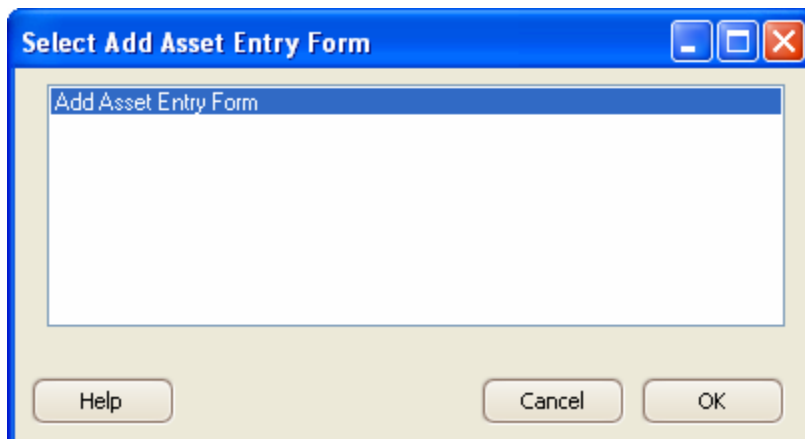
Pad Barcode Number With: Pad Asset Number (bar code number) from left or right. This setting will usually be set to 'left', which is the default setting. This control is available for those customers with a mix of asset numbers not setup properly with leading zeros or a mix of types. To sort properly the asset or barcode number has to be of fixed length.

Auto Assign Barcode Numbers: This is useful, as the computer knows the highest number currently allocated to assets and can automatically generate new, needed numbers, when you wish to do so.

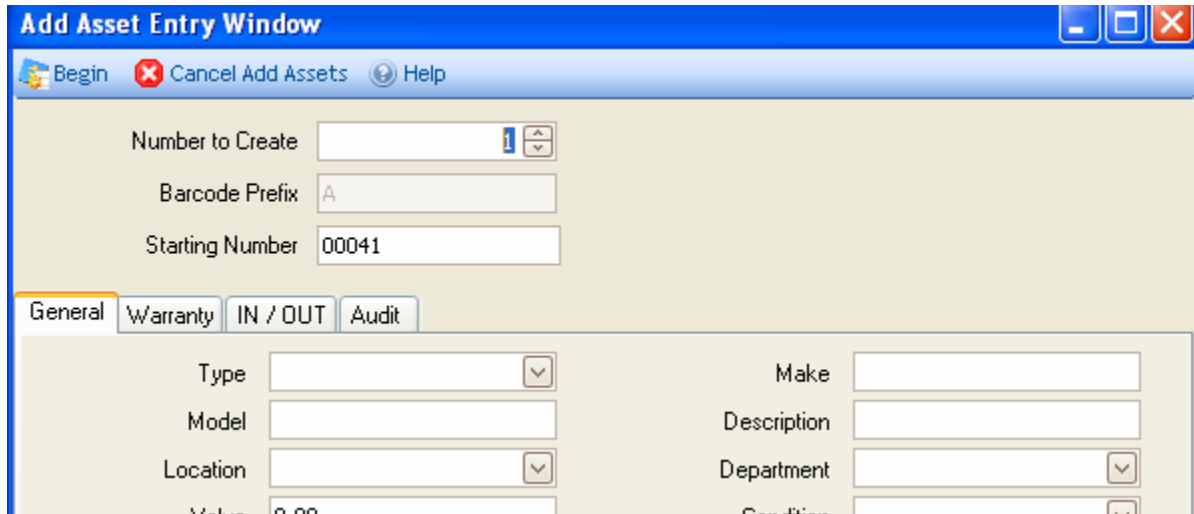
Next Number you want generated: If you check the 'Auto Assign' option, you are instructing the computer to use the number inserted as the next auto-number for a new asset.

GENERATING ASSET ID #'s (BAR CODE #'s)

Click on the "A+" icon in the Asset Grid or click on the 'Actions' menu and select the 'Add Asset' menu item. The following screen will appear.



Click 'OK' to obtain the Add Asset Entry Window shown below. This form can be 'edited' to your preference and this is explained below.



This form can be an excellent way to enter a number of similar assets, as long as you are allocating sequential numbers to these newly added assets. Whatever information is in the asset attribute boxes will be applied to all of the newly generated assets. Click on 'Begin' and then click 'Yes'. An editable window appears with the details of the new assets so you can make adjustments prior to adding asset records to the database.

All input forms can be customized to suit your needs. Customizing this input form is discussed in the following section.

Customizing Asset Data Entry Forms

Before you begin customizing input forms, you must first select Field/Column Headings that you will want to use. Specific views can also be associated to custom input forms so you may want to consider creating a custom view to associate to your custom form.

Customizing Input Forms will help you work faster and/or more accurately. We provide default input forms so you use them with the 'test' data provided. You will want to change these for your own system.

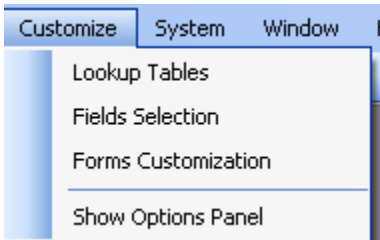
You can decide which fields to add to your custom input form and may choose to divide them between several tabs.

Before you start to customize the 'Forms' make sure that the Asset Grid window is closed. If it is not, the program will automatically close the Asset Grid window for you.

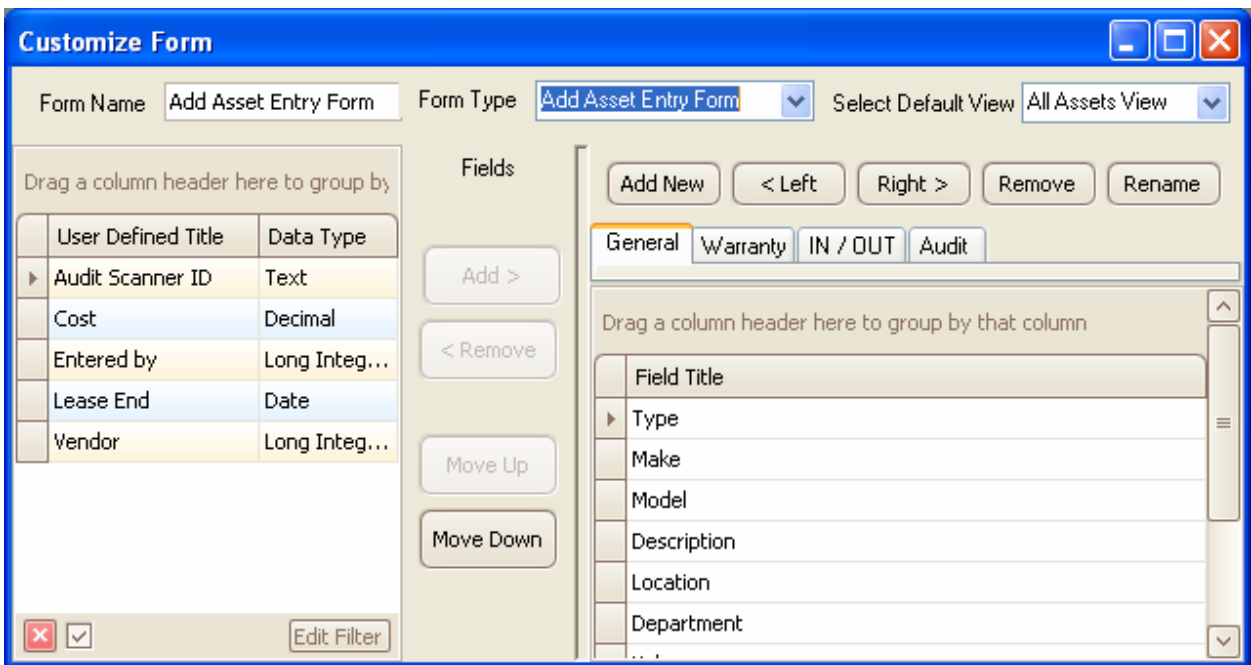
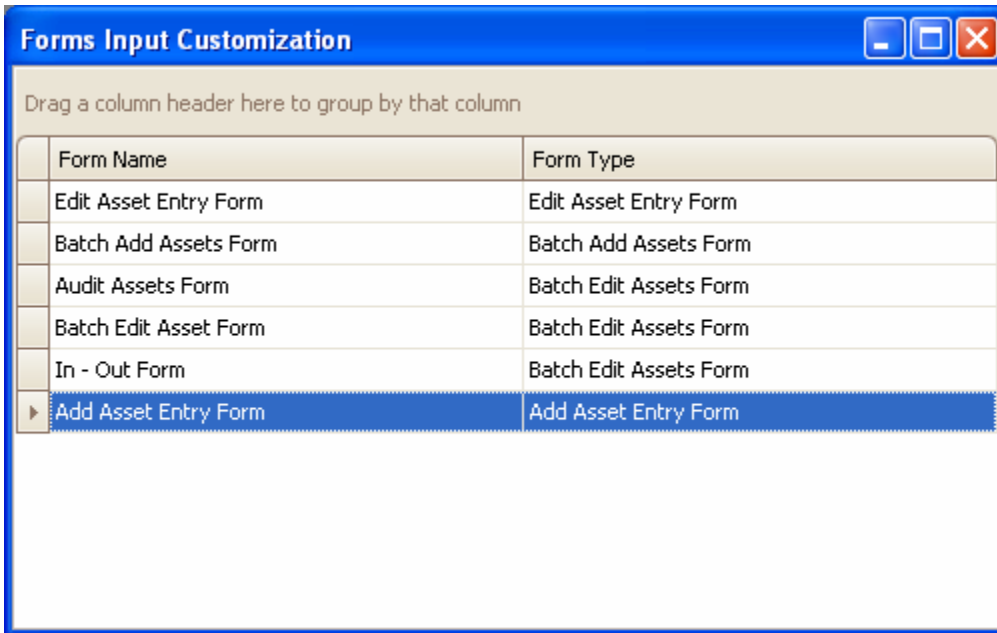
Let's review the simplest form to alter, the 'Add Assets Entry Form'. This form is shown below and can be opened by clicking on the A+ icon in the Asset Grid or by selecting the 'Add Assets' menu item from the Actions Menu.

As shown above, the Add Asset Entry Form window can be used to add one asset entry or many asset entries to the system. The top section will allow you to indicate the number of barcodes numbers/asset id numbers to generate. The lower section will allow you to insert the asset details for the asset(s) to be generated. This form, as with all input forms, can be customized to suit your personal needs.

To customize click on the 'Customize' menu and select the 'Forms Customization' menu item.



Now open the 'Add Asset Entry Form'. The 'Add Asset Entry' form type is used to add one or more assets to your system. Some power users might want to set up more than one entry form for different asset types.



To customize the Add Asset Entry Form, you will select which fields you would like to include when generating new assets. These fields will allow you to record information pertaining to the assets to be generated.

Types of custom 'Forms' you can design, name and recall. Note that this refers to the 'Type' of form and not the name you may give it after customizing.

Add Asset Entry Form

This is a form you use for dealing with one or more assets. A form might be designed to deal with a specific type of asset so you could chose from a number of custom named and designed forms. For example, computers, product machinery, software, furnishings, printers etc.

Edit Asset Entry Form

This form is used to edit information for a single asset and overwrite what exists in your system.

Batch Add Assets Form

This is a form for dealing with multiple assets input from your barcode scanner or file of asset numbers.

Batch Edit Assets Form

This is used to work with a number of similar assets scanned and downloaded on one form. Entries made on the form are set for all the batch of assets but can be individually modified on the 'accept' window that appears to allow for further editing prior to posting to database.

In-Out form is simply a renamed and saved Batch Add Assets Form

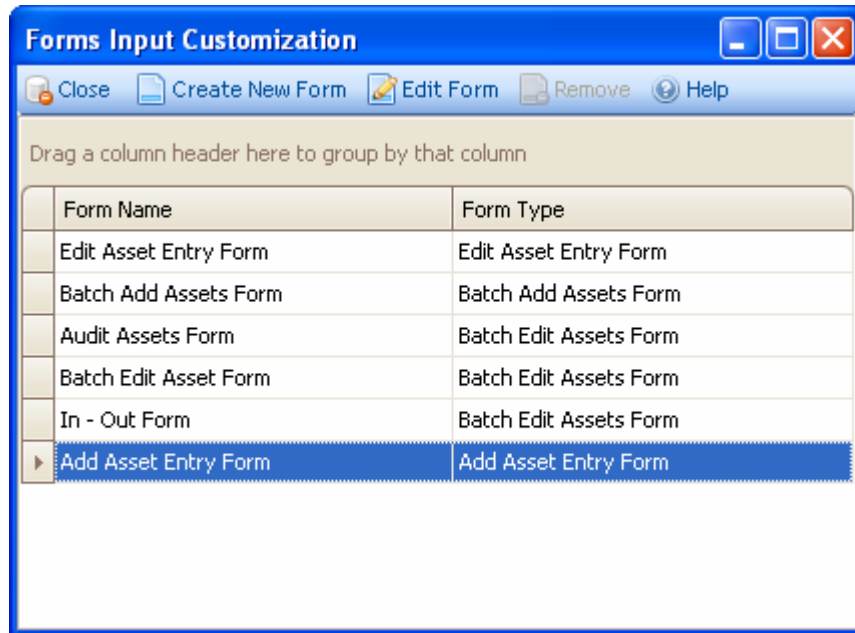
Use and modify this as you do other 'Batch Add Asset type Forms.

Forms Customization


This is accessed through the drop down menu 'CUSTOMIZE' at the top of the program window.

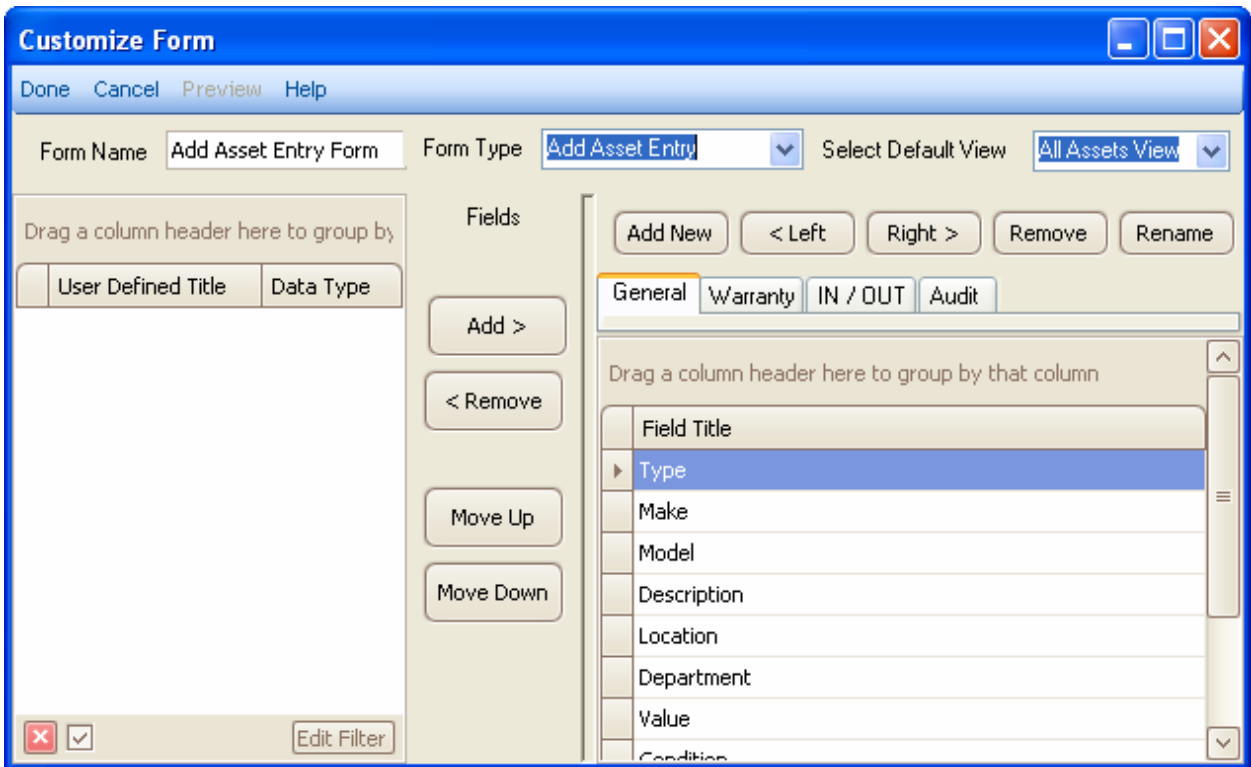
Left click on **Customize** and

Left click on **Forms Customization**

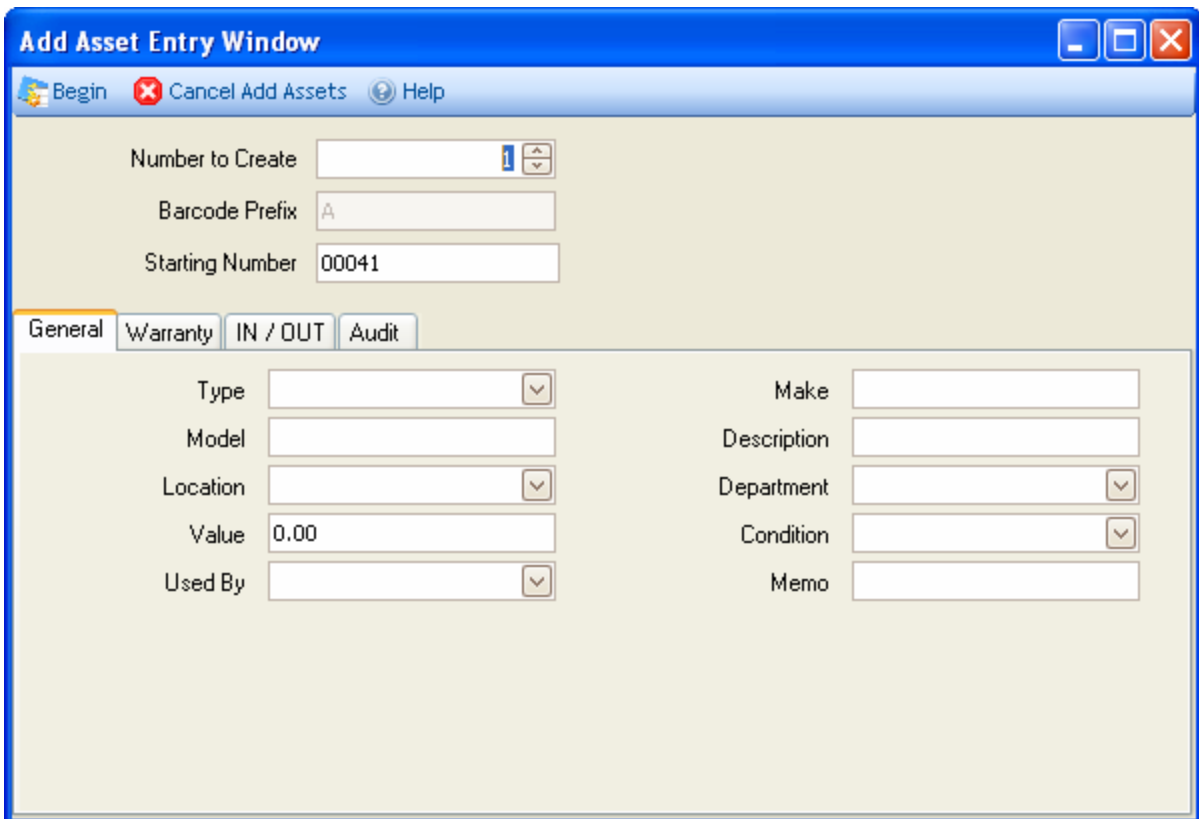


Left Click on **Add Asset Entry Form** (highlighted when you click on it)

Left Click  or double left click on 'Add Asset Entry Form'



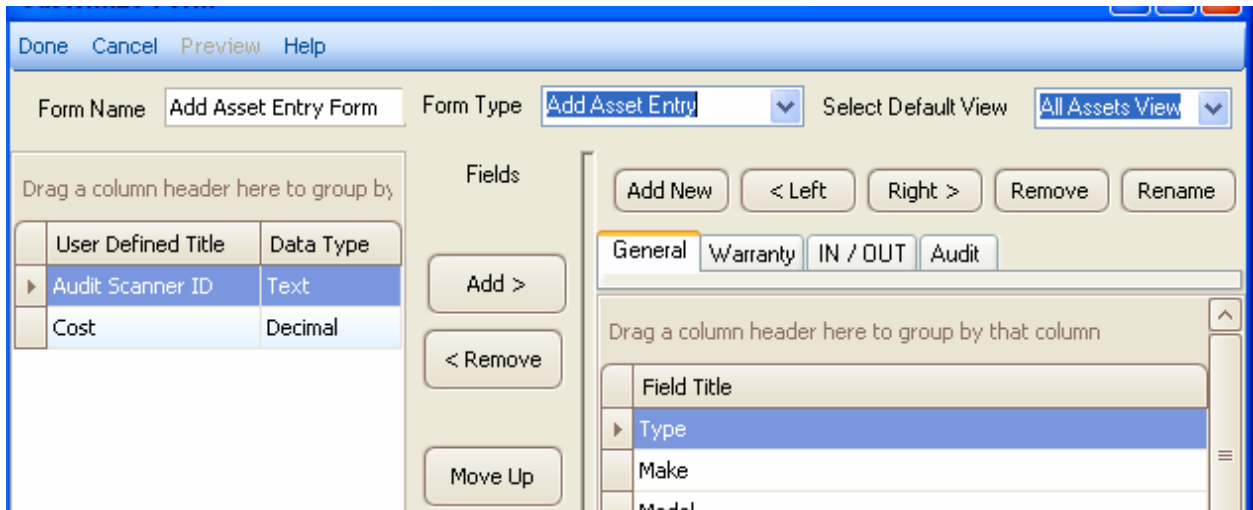
You use this set up form to add or remove data fields you will attach to barcode numbers generated. Click on 'Preview' to see how the entry window will look with the selections and order you set.



Note that 'Type' is box on top left and beside it is 'Make', below these are 'Model' and 'Description'. To change the order the entry boxes appear on your form you have to left click on the 'field title' you wish to reposition and then use the 'move up' 'move down' buttons provided in centre of customization window to arrange how you want them to look.

One last thing to consider, remember we mentioned ‘Custom Views’.

In the right hand corner of the ‘Customize Form’ window is a box with ‘select default view’.



When you use a ‘Form’ it is to add information to either a single asset or batch of assets. After accepting or initiating the addition of information you will be presented with an ‘editable grid window’. This window gives you the opportunity to make adjustments to the data before entering it into the system.


Once you click on the “Accept” button this information will be added to the Database. The ‘editable grid window’ used during this process can defined and selected in the Customize Form window.

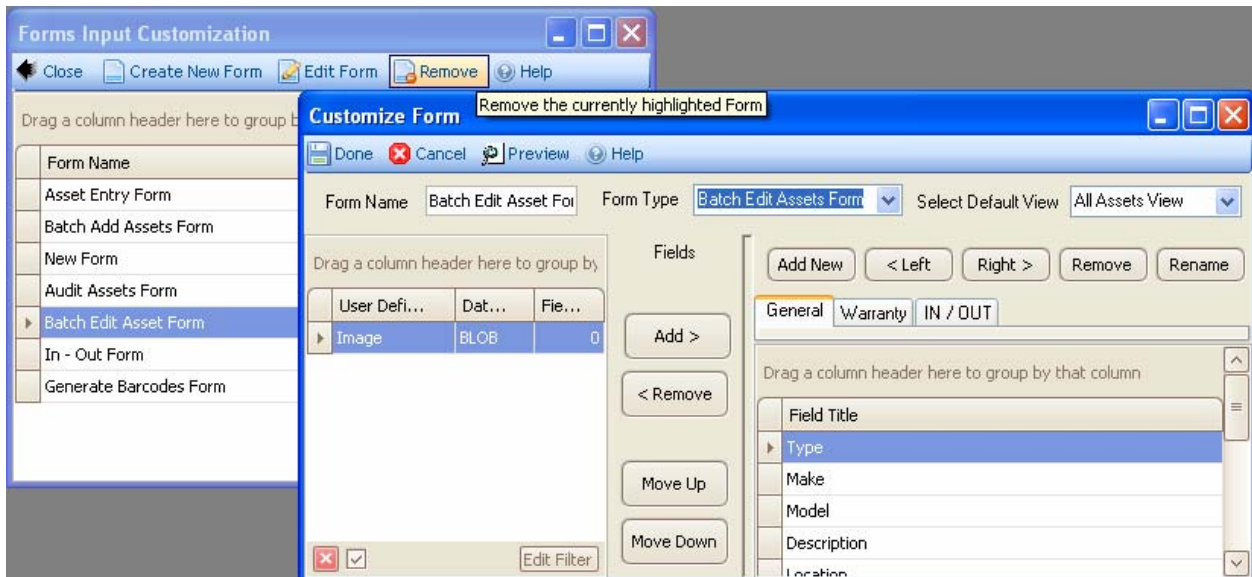
It is best to have the editable grid view use the same fields as was used in the associated custom form window. Certainly you can add additional fields to the editable grid view. For example if you have a ‘serial number’ field and are adding in 20 Compaq laptops you would be able to detail the serial number for each entry before accepting the information into the database.

Making up a ‘Custom View Window’ is a pretty simple operation explained well in our manual. Some might only want to have 3 or 4 of these Views but 10 or more wouldn’t be excessive.

Customize: Add Asset Entry, Batch Add Asset & Batch Edit Asset Forms

This process is accessed through the drop down menu ‘CUSTOMIZE’ at the top of the program window.

- Left click** on **Customize** and
- Left click** on **Forms Customization**
- Left Click** on **Add Asset Entry Form** in the list (or name of other form you are customizing) or double click to call ‘edit’.
- Left Click** 



The steps outlined below show you how to alter and set up a number of different ‘Forms’ as well as prepare new ones for your specialized use. All of these ‘Forms’ use ‘Tabs’ to organize fields with in the form.

Some may not wish to use the precise control offered by multiple tabs and just use a ‘General’ tab or possibly two tabs. It’s your choice.

To Change the Fields on a Tab

Fields named in the Left section of the ‘Customize Form’ window are the fields that you have marked as active in the Field Selection window and that have not yet been assigned to any particular data entry tab for the form. *In any specific ‘Form’ a field can only be used on one tab and not duplicated on other tabs.*

Fields in the right window are those fields currently in use for the chosen data entry tab. The order of the fields in the field list determines the position of the fields on the form. You can change the field order by clicking on a ‘field’ and using the ‘move up’ and ‘move down’ buttons in centre of window. A preview function is incorporated so you can view how the finished form will appear.

First

Between the left and right field columns are two buttons to add or remove selected fields from each column.

Left Click on the field you want to add or remove to select it and

Left click or to add or remove.

The selected field will move to the other column.

To Add a Tab

Left click and a new Tab will be added

Name the Tab by entering the name for the new tab.

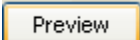
Press **Enter**

To Change the Name on a Tab

Left click  and type the name for the tab

Press **Enter**

Preview the window

Left Click  to see what your revised tab will look like.

If all is OK, in the Preview window

Left Click any where on the screen to close the preview window.

Left Click the Done button to save and close the ‘Customize Form’ window.

Adding an Asset:

Now you can open the Add Asset Entry Form windows to add an asset as the ‘tabs’ now contain the fields you want and in the order you set.

Left click on **Assets** menu

Left click on the **Open Asset Grid** menu item. After the Asset Grid opens,

Left Click on the **Actions** menu,

Left Click on the **Add Assets** menu item.

Left Click on the **OK**.

Note: When using these forms to get data into your database you do not have to enter information in all the ‘boxes’ you’ve set up and can leave them ‘empty’. **Do understand that the program will then input ‘empty’ into that field on the records.**

Speed up Data Entry with Lookup tables

To speed data entry Look Up Tables are provided for certain types of column headings/fields. Use of these not only can speed up entry of data but can prevent spelling errors and ensure uniformity. Entries will automatically be added to the lookup tables when you input text into one of these fields. You can also edit or add data for all ‘lookup tables’ using the Lookup Table window. Instructions are provided below under the ‘Editing a Look-up table’ section.

Below is a listing of ‘Fields’, which have lookup tables attached. Remember, you can rename these ‘fields’ for your own use.

Column Heading/Field	Function
Asset Type	Could be a grouping for accounting or type of asset.
Asset Class	Could be grouping for accounting or type of asset.
Department	Company Department holding assets.
Vendor	The business from which the asset was purchased.
Location	The physical placement of an asset. Especially useful if a company has two or more plants.
Used by	Person holding or using the asset.
Condition	Useful to tell when replacement might be necessary.
Taken by/In from	For tool tracking application.
Entered by	Person making entry

Adding/Selecting Lookup Field Values

When adding or editing an asset, lookup table fields will display a drop down list to allow the user to select an existing value. You can also add a value to this list by typing in the new value into the lookup field cell and pressing Enter. Select **Yes** to add the new entry to the appropriate table.

Adding an employee to the look up table

1. **Go to** the **Menu Bar** and
2. **Select** **Customize**
3. **Select** **Lookup Tables in the drop-down list**
4. **Enter** the Last name in the 'Value' column
5. **Add** a comma and type first name or initials
6. **Tab** to the Is Active Column
7. **Press** the Space Bar to put ✓ in the square and to activate the name.

The name will now appear in the drop down list in the program.

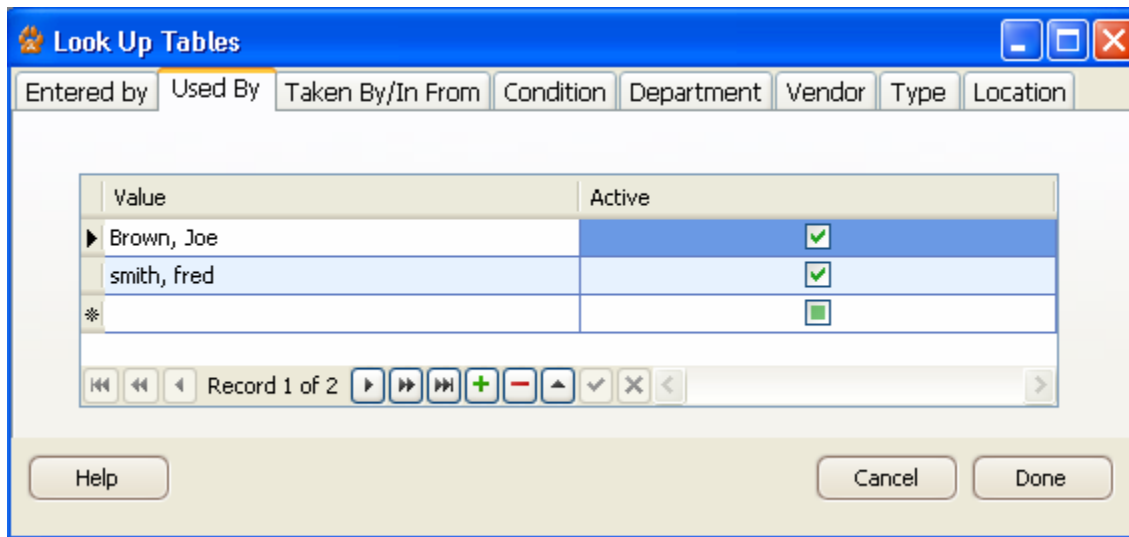
Important Note. If you are assigning assets to a **new employee** always **add the employee's name** to the look up table **before** assigning assets. We suggest entering the last name, then a comma (,), and then the first name. This will allow you to easily sort employee names by last name and ensures that no two employees have the same last/first name.

Editing a Look-up table

After frequent use, the Look-up Tables may contain items that are no longer needed or may need to be edited. You can use the Lookup table window to edit each lookup table in order to prevent lookup table field pick lists from becoming too long or having choices that are no longer needed.

To access the tables directly

- | | |
|---------------|--|
| Go to | the Menu Bar and |
| Select | Customize |
| Select | Lookup Tables in the drop-down list |




'Look Up Tables' are presented as a group of tabs in a single window. **To access a table**, click on the tab. Clicking box on left of 'Value Column' activates the row you wish to edit, delete etc.

The first column, 'Value' contains the names that are available to choose from in the drop down list when working in a 'View'.

Active, the second column is a Check box to decide if the item is in use. With a ✓ in the box the item is active and can be used. The checked items are shown in the pick list when adding or editing an asset record.

To add an item, type the name in the bottom cell, then check the Active checkbox to make the new item active.

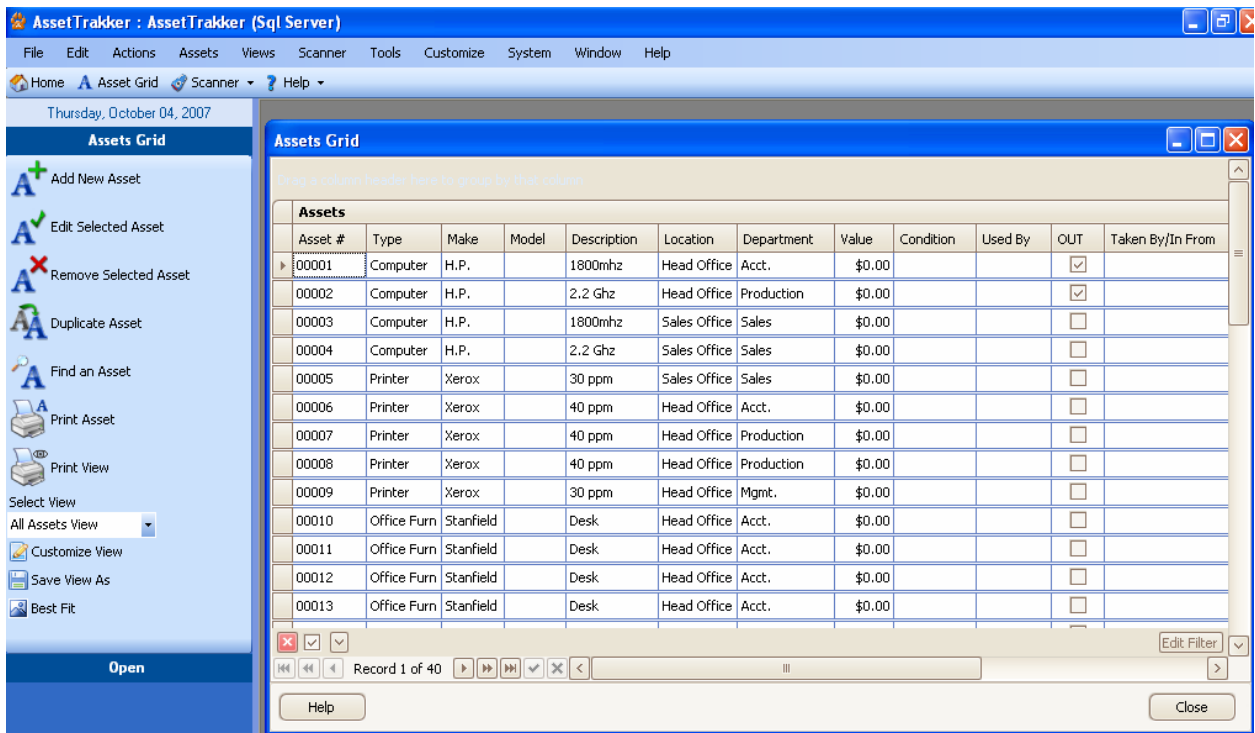
The  buttons at the bottom of window are useful for adding/subtracting items as well as to set items into edit mode. The checkmark and x icons are only accessible when a cell is selected. The minus icon can only be used when a row is selected. To select a row, click on the row handle that appears to the left of the Value column.

Program Window

The Program Window is the desktop for the program. It has the usual look of a Windows application with a Title Bar, a Menu Bar, an Icon Navigation Bar, and a Status / Information Bar showing the status of the scanner at the bottom. The last Asset Data Base used opens upon running the program, in the **All Assets View**. On first use the test database called AssetTrakker.mdf opens to assist you in learning and practicing program use. Database(s) will be in the location on your drive you selected when you installed AssetTrakker you may of course save in a different location including on a server.

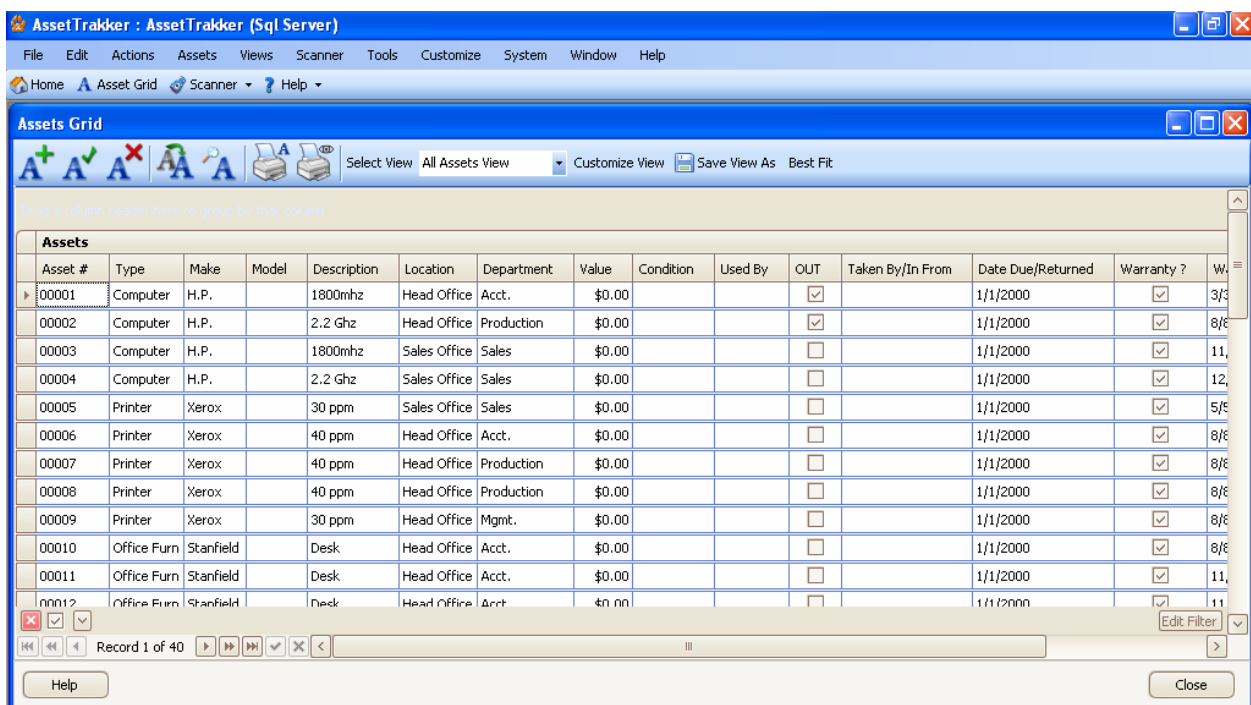
The view shown on the next page is how AssetTrakker first opens and shows an 'Options' panel on the left and the 'Asset Grid' window on the right. Some of you will want to keep this 'options' panel open while others, would rather have those functions available on the 'Asset Grid' window.

***Note that for other screen shots within this manual the 'options' panel is turned off**, showing both views available to you adds little benefit and would make the manual much larger.



To remove the 'Options Panel' left click on **Customize** in the menu bar and again on **Hide Options Panel**. The asset view window closes and you must click on the **AssetGrid** button to get the Asset Grid window back with command functions displayed across the top of the 'Asset Grid' Window instead on inside panel.

By using various Grid Views, you control and display details about your assets in a number of different ways. You can sort the assets in ascending or descending order, group the assets, add assets, edit assets, delete assets, move columns, hide/show columns, search assets, use multiple filter search criteria etc. and save the resulting setup as a 'custom view' to be called upon again to see data in a similar manner.



Adjusting size of open window.

In both the screen shot above and below the 'Asset Grid' window is not maximized. Right click in the box at top right of window to maximize. Alternatively as in other programs you can adjust size of the asset listing window by moving mouse to edge of window and dragging window right, left, up, down or diagonal to size it.

Changing the column and row 'height/width'

There are two ways to adjust the column width. You may click on the **Best Fit** button at the upper right of the screen OR, IN THE ROW CONTAINING THE COLUMN HEADINGS you move the cursor to line separating the columns, left click and drag left/right to change the column's width.

To change height of rows you simply move the cursor to a line separating rows and when up/down arrows appear you left click and drag to obtain desired row height.

Customize your View

By moving columns it is possible to put the columns in the order that provides the best flow of information for you. On start up the asset information is shown with columns arranged across the screen in one row. This may result in columns extending beyond the viewable screen, which can be viewed by scrolling sideways. You may prefer to see all columns headings/fields on the screen, drag some of the headers down a row so all your asset data shows on the screen.

	Point	to the header you wish to move
To move a column	Press & Hold	the left mouse button
	Drag & Drop	the column to the place you want it

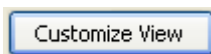
If the column drops into the wrong place repeat the process until it is where you need it to be. If it drops to a lower line you will have to drag it back up.

A quick way to hide a column that you do not want on the screen is to drag it down the screen until a large **X** appears at the side of the title. This could happen accidentally. Do not panic if this happens. The column can be reinstated using the 'Customize View' control to reinstate the column. If you hide a column in any view the data in the column is retained and not lost.

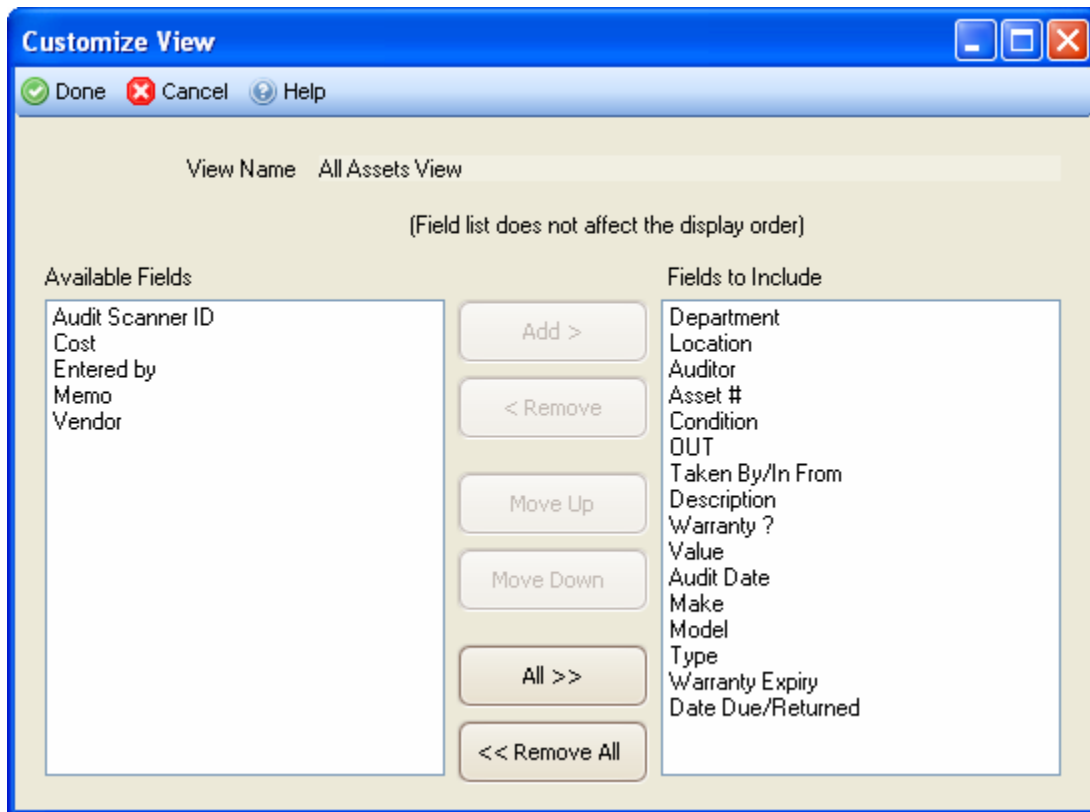
Adding or Removing Columns in Customize View

To add column headings/fields, to an open Grid View, you use the Customize View tool. This window can also be used to remove fields/column headings from the view.

Left Click



, in the top row of an open asset listing grid view to launch the 'Customize View' screen. This can also be called up by clicking on 'Views' menu and selecting the 'Customize View' menu item.



Highlight the Field that is to be moved to, or from, the view by **Left Clicking** on it.

If you select a field in the left list 'Available Fields' the button is made available, **Left click** it and the selected field will move to the Fields to include list. If you choose a field in the Right column, In the 'Fields to Include' list, the button is available. **Left click** it and the selected field will move to the 'Available Fields' column. When all the fields that you want to include in the view are all in the right-hand column, **Left click** and you return to your view with the new columns.

To finish, Left Click on and give the View an informative name, or if preferred just keep the original name and save it so it is available for future use with your changes.

Saving your custom built 'Views'

REMEMBER layout changes made to a view while working on assets only affects the current view selected and only becomes permanent if you click the 'Save View As' button and select either a new name for the view or save it under the existing name.

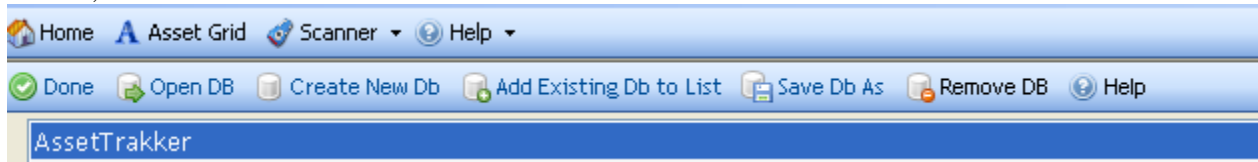
If you just close the open view, your modifications will be lost and next time that 'view' is opened it will be as previously set and saved. We designed the program this way so you can move things around in a 'view' to check on assets without worrying about disturbing your default view.

The ability to develop a specific view and save it for recall is a major benefit of AssetTrakker. It's simple: work on a view until you get an asset data presentation you wish to use for some specific reason. Then left click on the 'Save View As' button at top right of the view window. Type in the name you wish to use for this custom view and click 'Save'

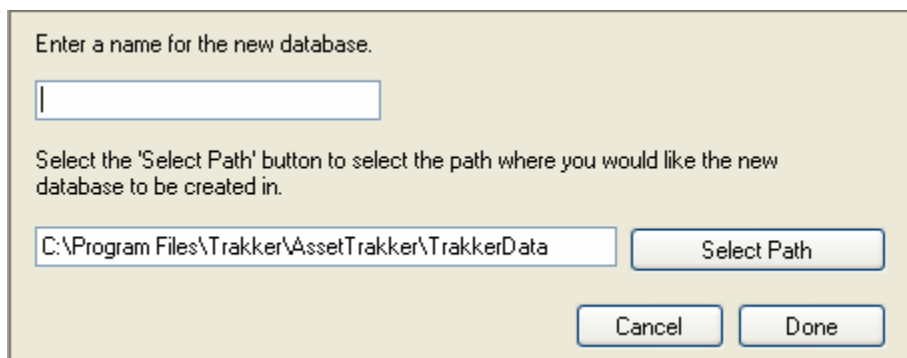
Your Custom Database

You will want to replace the asset information supplied in the 'test' data with your own asset information. This does not mean you have to lose the 'test' database and can keep it for training purposes.

Click the 'File' in the Menu Bar and then click on 'Database Action Window. A number of choices are offered, click on 'Create a New AssetTrakker Database.



Now you will enter a name for your new 'blank' database and can either approve the default location to save it or specify the location you want. Next time you open the program it will automatically open this new database, if it was the last database you worked on.



NOTE: Any formatting of views, column positioning, fields selection etc. that you did on the 'trial' database will be carried over to your new database as well as any security settings and passwords. So any modifications you made during test mode to get close to what you want in your program is not lost and you can continue on with your modifications.

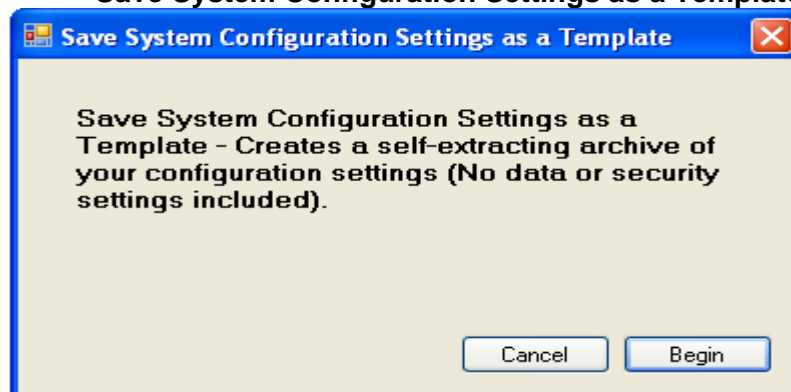
Templates

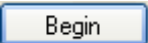
Save or Open System Configuration Settings as Template(s)

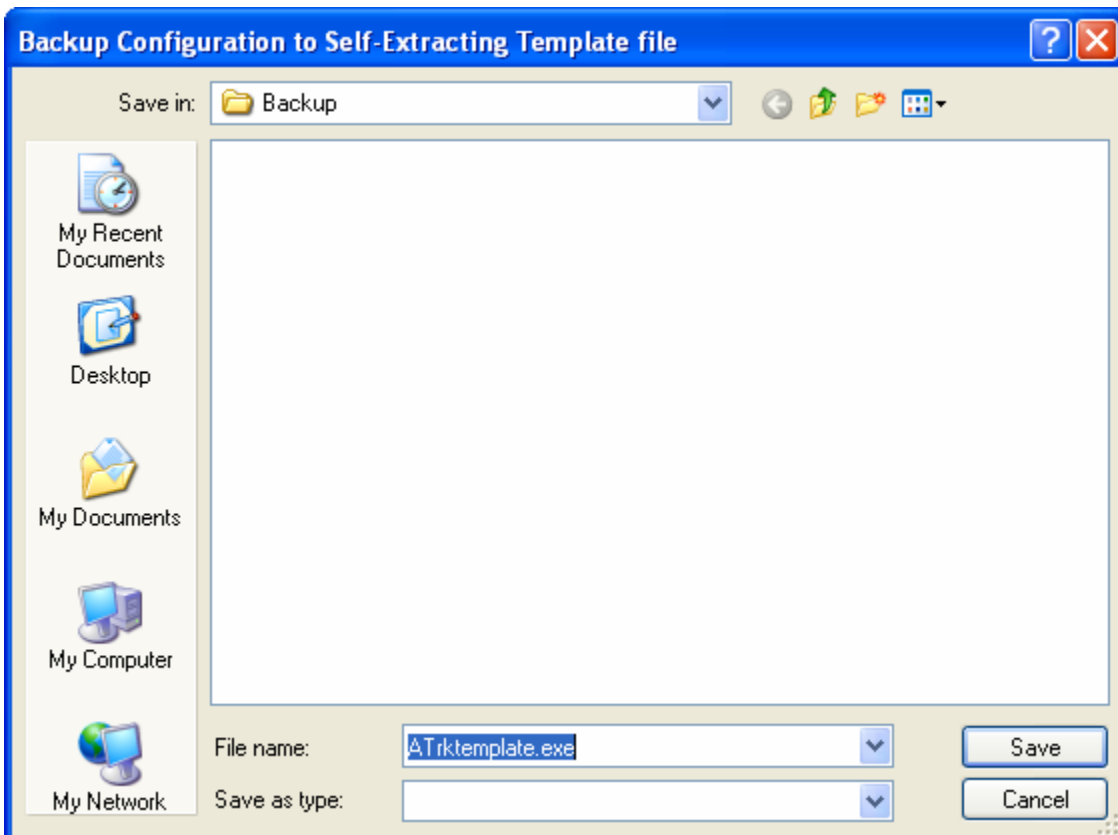
Very useful to distribute your specially named custom views as well as entry 'forms', or to switch between different settings.

**Left Click
Select**

on the **Systems** menu
Save System Configuration Settings as a Template



Left Click  and choose template name and where to save it.



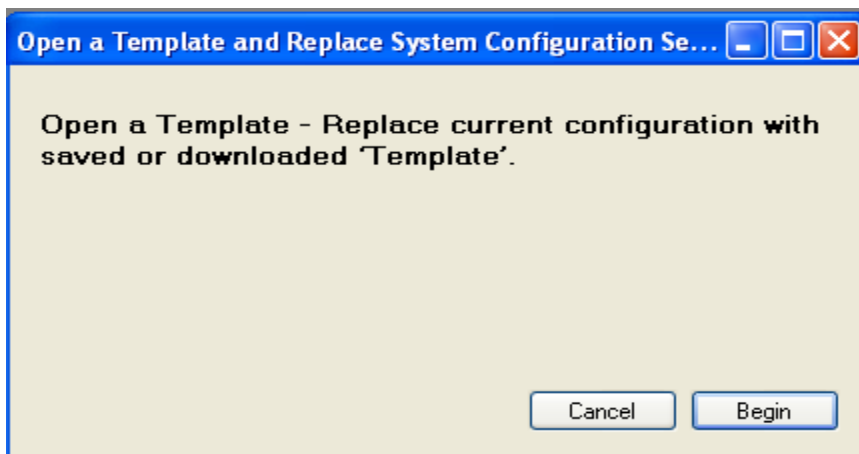
NOTE: AssetTrakker will then close and have to be restarted. See explanation under [Backing up](#) as to why this is necessary.

Open a Template and Replace System Configuration Settings

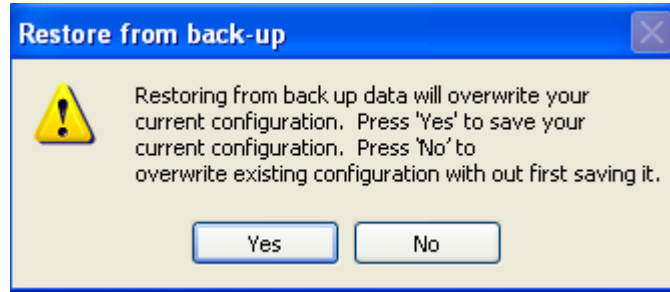
You may wish to download a 'template' from www.trackitsoftware.com for a layout sample that is closer to what you desire and then modify it. We will be posting different 'templates' developed by ourselves and end users such as yourselves. First download the template and save it on your computer. Next **left click 'System'** menu option and click on **'Open a Template and Replace System Configuration Settings'** from the dropdown menu.

Left Click on the **System** menu

Select **Open a Template and Replace System Configuration Settings**



Click on Begin




Note that this warning has to do with your 'configuration settings' and not your asset data. Configuration has to do with what column headings/fields are active, edit window set ups, grid views etc. Since your data is untouched, you are free to build templates to give very different ways of viewing and editing data. Opening and using a 'Template' is something most will only use once when setting up a customized program. Your situation might be different. For example Accountants might want to use a template different from that used by I.T. Manager.

Viewing Data in different ways


Sorting data

To sort the data in a column, **point** to the column heading and **left click** to sort the data in ascending or descending order based on that data column.

When you click on the column heading the triangle at the right side of the column heading  will show the sort order. When the point is up, the sort is in ascending order. If the point is down the column is sorted in descending order. A second click will reverse the order.

Using 'Filters' to alter the 'View' in order to limit assets and data presented

Filters allow the user to view certain data that meets specific criteria. Data that does not meet this criteria will be hidden from view until the filtering as been removed. You can save this new view under a different name for recall at a later time.

Point to the symbol  at the right of the header that contains the data you wish to filter (this icon will appear when you move cursor over column headings).

Left click this icon and a drop down list appears.

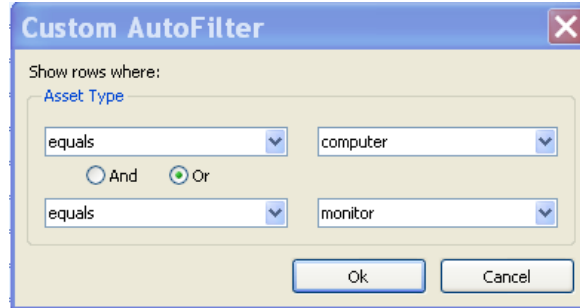
To filter assets by a single column value


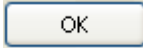
Left Click on the value you would like to filter by. Records for all other possible choices are hidden.

To restore the full list of assets repeat above and from the list select **All**.

To show more than one selection

Select (Custom) and an easy to use Autofilter appears



- Left click **in first box and**
- Choose equals
- Point & Left click **the V mark in the right hand, upper box to call up a list of choices**
- Select **your choice**
- Left Click  **Or (the Or selector)**
- Left click **in first box on the second row and**
- Choose equals
- Point & Left click **the V mark in the right hand, lower box to call up a list of choices**
- Click 

The Asset Grid now shows only the asset records where the column used contains one or the other of the parameters selected. A message at the foot of the window reminds you of the selection mode. Do this on two columns and you can further format or limit the data shown.


Some data can be grouped by using **is greater than** and **is less than** in building the criteria and you can see records that fall between the data points.

Programmable Sorting Filter 'Edit Filter'

This special filter requires a bit of knowledge and experience about what 'logical operators' to use. This can be a powerful tool but most of us will not need it. With this tool multiple criteria can be set so your view shows only those assets meeting all the criteria set.

This 'Edit' Filter can be extremely useful but is complicated. Since most users will not want to use it, we have moved full particulars of its use to [Addendum 2](#) at end of the manual.

Restoring all scan data to view

- Left click **on the**  **in the column heading and**
- Choose **(All) from the drop down menu by left clicking on it.**

Viewing Data by GROUP SORTING

This is a special way to prepare views that you may find exceptionally useful. It is harder to explain than having you try it out to see the kind of special results that can be obtained. When you use two or more 'column headings' it gets very interesting. A Parent/Child relationship can be made by setting up special 'associated' column headings and group sorting to view these asset groups.

Drag and drop a **column heading over the words at the top of grid**

On next page is what the view will change to when the column header LOCATION is moved.

Asset #	Location	Date Assigned	Type	Make
+ Location:				
+ Location: Florida				
+ Location: Georgia				

Left click **on the [+] box to the left of a group column name to view the data for that group.**

Asset #	Location	Date Assigned	Type	Make
+ Location:				
- Location: Florida				
003345	Florida	6/27/2006	Asset	
+ Location: Georgia				

You can do this again by left clicking on the other [+] signs to call up more views on the same page. The [+] sign changes to a [-] sign when the data for a location is viewed. By left clicking on the [-] sign the data is minimized for the location. The data is once more hidden.



Adding other columns to the grouping can refine group sorting. The order that the column headings are added to the sort listing determines the effect of the sort.

Drag and Drop another heading up beside the first heading at the top of the view.

Left click the [+] sign beside the headings and repeat at each level to obtain the final grouped data you wish to see.

Asset #	Location	Date Assigned	Type	Make
Location				
Asset #				
+ Location:				
- Location: Florida				
- Asset #: 003345				
003345	Florida	6/27/2006	Asset	
+ Location: Georgia				

It is possible to further limit the grouped data to a specified range by using the 'Sort Filter' that is available when viewing the data.

Left click  on the  beside Asset # in that column heading (this appears when moving the cursor over the column headings)

Click on 'Custom' selection or chose other filter controls from drop down list.

*Note: Group Sort Views can be saved for later reference, just like Asset Listing Views.

Returning to the full data grid

To clear the grouping of the data and return the Asset Data Grid to its original form showing all scans, clear the filters by selecting 'All' from selection list then drag the headings back down into the original column heading area.

Using Summaries within Group Sort View Window

(To obtain details, such as, the total value of assets)


End users can manipulate **total summaries** and **group summaries** using the **footer context menu**. The menu can be invoked by right-clicking a footer cell. Each menu item corresponds to a summary type (sum, average, etc). Clicking an item applies the appropriate summary to the column whose footer cell was clicked. Each summary type applied has a default display format. The table below lists menu items, their corresponding summary types and default format strings.

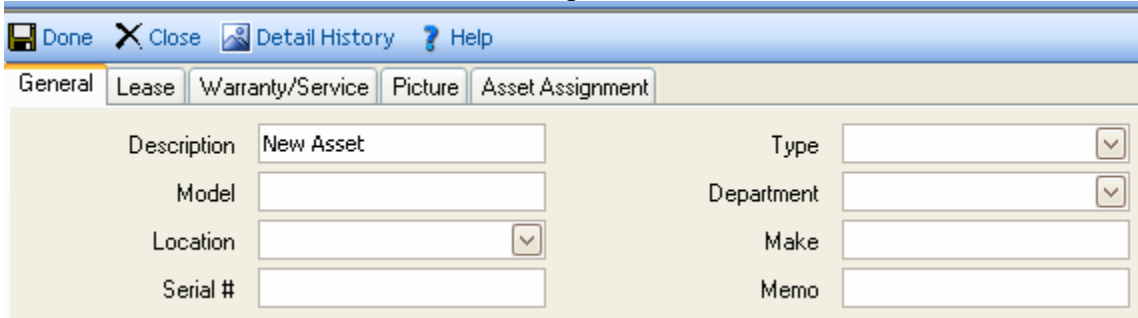
Menu Item	Effect
Sum	The summary value is the sum of column values. The default format string is "SUM={0}".
Min	The summary value is the column's minimum value. The default format string is "MIN={0}".
Max	The summary value is the column's maximum value. The default format string is "MAX={0}".
Count	The summary value is the number of records within the calculation range. The default format string is "{0}".
Average	The summary value is the column's average value. The default format string is "AVR={0}".
None	Cancels summary calculation.

Entering/Editing Assets

Information about assets can be placed in your program/database by doing so directly on the open 'Grid View Window' or by using one of the customizable 'Forms' provided for you. Sometimes it's easier to use one method and sometimes the other depending upon number and amount of information being entered or modified.

Add Asset (Form/Window)

Left click upon 



Using this form, which you can customize, may be easier than entering data directly onto the 'grid view'. It is broken down in the same manner as the Edit Form.

Adding Images to Assets Record

Left click in the 'image' column in the row where you wish to add a picture (you do have to have the image field active in order to attach the picture)

Now click on 'Picture' and load the picture from where you have stored it on your computer.

Editing Records on the 'Grid' within Views

Grid Windows allows editing of multiple assets without leaving the view. To enter the edit mode; double left click on one of the grid cells, usually in the cell you wish to edit. You will find it easier to show only those columns that you need to edit for quick referencing.

Enter Edit Mode Double left click in a data cell

Left Click in the cell you want to edit

Make the change needed. *Note that standard shortcut keys: **Ctrl x** for cut, **Ctrl-c** for copy and **ctrl-v** for paste work

To finish press enter or click on another record cell and the entered data is automatically updated.

To move between cells while staying in Edit Mode use the arrow keys or left and right tab. Using the mouse pointer to move will take you out of edit mode and a double left click will again be required.

***Fields/Column Headings that have 'lookup tables' attached to them are different. If you type data into a lookup table cell, you must press the enter key which will add that data to the popup list. If you click off into another cell without pressing return no data will have been added.**

However, right clicking to call up the list and clicking to choose right choice will automatically add that data when you change focus to another cell.

Editing Record on a 'Card View' Form

This way of entering data may be more familiar for some of you. This calls upon the 'Edit Asset Entry Form'. Full use of this form is outlined on the next few pages. This form can be accessed quickly in several ways.

Double left click in a data cell to Enter Edit Mode.

Now point and right click in any cell to obtain 'screen shot on next page.'

Description	Department
Special Graphics Computer	R&D
Fax	Administration
Printer	Administration
Printer	Management
Computer Work Station	Sales
Computer Work Station	Sales
Computer Work Station	Management

Now left click on 'Edit Form' to obtain an 'Edit Asset Window'

Asset Entry Form - 00001

Done Close Detail History Help

General Warranty IN / OUT Audit


Type Computer Make H.P.

Model Description 1800mhz

Location Head Office Department Acct.

Value \$0.00 Condition

Used By Memo

Note that this entry window is the same as obtained by clicking on the  Icon, that is discussed in detail below and used in the same manner.

Edit Assets Form (Window)

The Edit Asset Window is, also, accessed through Add A New Asset, Edit Asset or the Quick Search icons. When Add a New Asset is used the cells in the window are blank. When Edit Asset is used the currently selected asset details are in the cells ready to be changed as needed.

Left Click



‘The Edit Asset Form’ will appear (shown on next page)

If you clicked Add A NEW Asset



an empty asset record will be presented for completion.

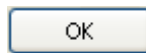
If you used the Quick Search



you will need to enter the Asset # or use the scanner to download an asset ID # barcode. This will find the asset record for editing.

Enter or Edit the asset data. This may be spread over several tabs depending on the way you have set up the program. When complete

Left click



The Edit Asset Form can be divided into several tab sections. This allows for power/specialized applications. In the trial/test database these are set to be:

General, Warranty, IN/OUT, Audit

Asset Entry Form - 00001	
Done Close Detail History Help	
General Warranty IN / OUT Audit	
Type	Computer
Model	
Location	Head Office
Value	\$0.00
Used By	
Make	H.P.
Description	1800mhz
Department	Acct.
Condition	
Memo	

The General Tab would be most commonly used. By dividing up the asset information between tabs, users can enter or modify specific asset information more quickly than by editing directly on the Asset Grid Views. In [Customizing Asset Data Entry Forms](#) you learned how to change these Tabs or add additional tabs and set the column headings/data fields to be included in each tab.

When entering asset information you may not have all of the information that you will be tracking. If certain information is not available, or not needed for this particular asset, just leave the field blank and move on.

Detail History Button


In the ‘Edit Asset Entry Form’ you’ll see a ‘Detail History’ button. Clicking on this will show you all the changes made previously in fields for which ‘keep history’ was set. History

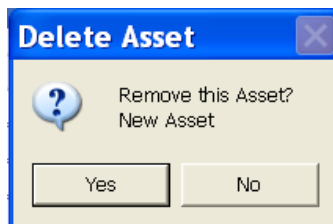
can't be edited. It's a minor tool but a nice way to review what was done with assets in the past prior to making the current adjustment.

Tabbed Data Entry Forms

In the trial/test database 'template' you see when first opening AssetTrakker the 'Edit Asset' data entry window has four tabs. Fields you want in a 'tab' may be missing or the fields may not be in the order that makes entering data simple. Alternatively you may not want all of the fields that are originally set up for entry. All of this can be customized. See [Customizing Asset Data Entry Forms](#)

Removing an Asset Record

- Select** the record to be removed
- Left Click** the remove Icon 
- Click** Yes in confirmation Message



Find An Asset



[Quick Find](#) is explained in detail in the scanner use section.

Setting Access Policy for Users

The **Administrator** has full access to both ‘User Lists’ and User Roll List’ as access is automatically set-up at the time of installing this program. **If only you, the Administrator, are using this program then you will not have to read further or make any changes.**

If you are going to allow other users access to this program and the database, it may be prudent to allow these other users limited access. This prevents deliberate or inadvertent corruption of your asset data.

Since most users will not set different levels of access, we have placed full details of how to do this in [Addendum 6](#) of this manual.

Print, using various Asset ‘Views’

To prepare a report on assets you simply tailor an asset view to what you want in the report. This is done in the same way that views are manipulated for screen viewing. **WYSIWYG**

While a particular ‘Grid View’ is active you can use the special **Print Preview Window** function. This ‘Print Preview’ Window allows you to print directly from an Asset Grid Window. You can select any view you want to print. For example, if a user wanted to print the entire asset list showing asset locations, they might select their own custom view saved as ‘All Asset Locations’.

You can use all of the sorting and filtering explained earlier in this manual. For example if you wish to print off only a range of asset numbers just ‘filter’ on the asset id # (barcode #) column by ‘greater than’ and ‘less than’ to get a view of just those assets to print off. The newly modified view can be saved if you wish or you can revert back to the previous view.

It is hard to explain the simplicity and reporting power this ‘View’ and WYSIWYG method provides. Almost always you will want to print a report that looks the same as the listing of assets on the computers screen.

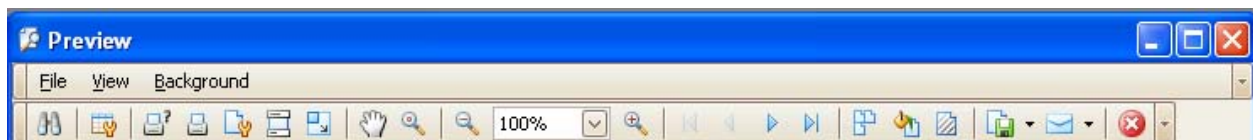
Of course we provide tools ‘described below’ to add headers/footers and special print formatting. These are saved along with the ‘View’ you are using and are instantly available. After print formatting, you do have to save and overwrite the view to capture the new format.

Printing Reports

Reports are basically screen views. The Screen View/Report can be formatted with appropriate headers and footers, if needed, by using the ‘Print Preview’ found under ‘File’ in menu bar. *Note that print formatting is saved/attached to the view used, and potentially saving you some effort the next time this view or modification of it is used.

Prepare the information in the grid window to obtain what you would like to print. If you wish, you can save this format as a specially named ‘custom view’ for use again later.

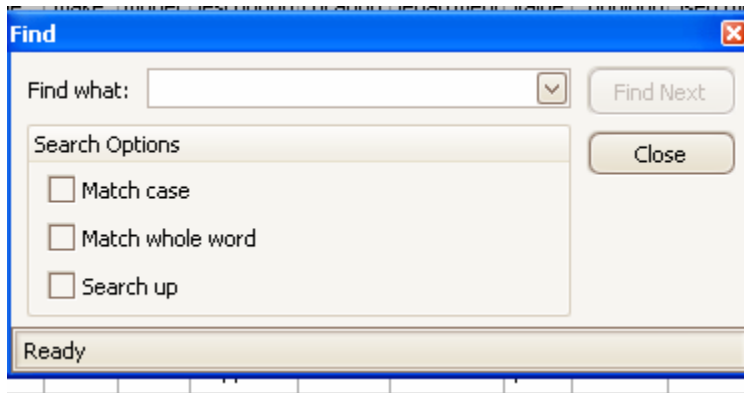
Choose Views/Print View **from the Program Menu (Or click on**  **Icon)**



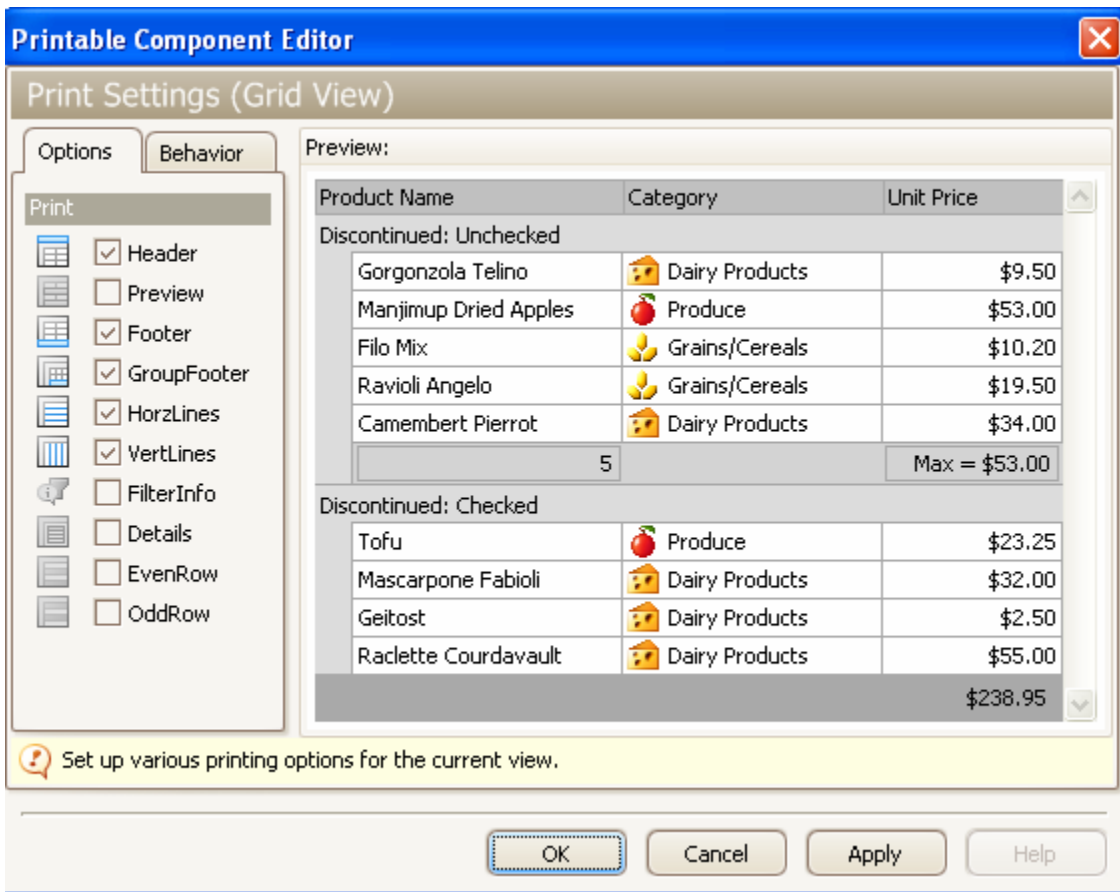
Scroll over the ‘icons’ with the mouse pointer and the name of the control will ‘pop up’. The names do indicate what each control will do to the print layout. Each icon control is described below in the order that they appear above.

Print Preview Window Menu and Icon Control Bars

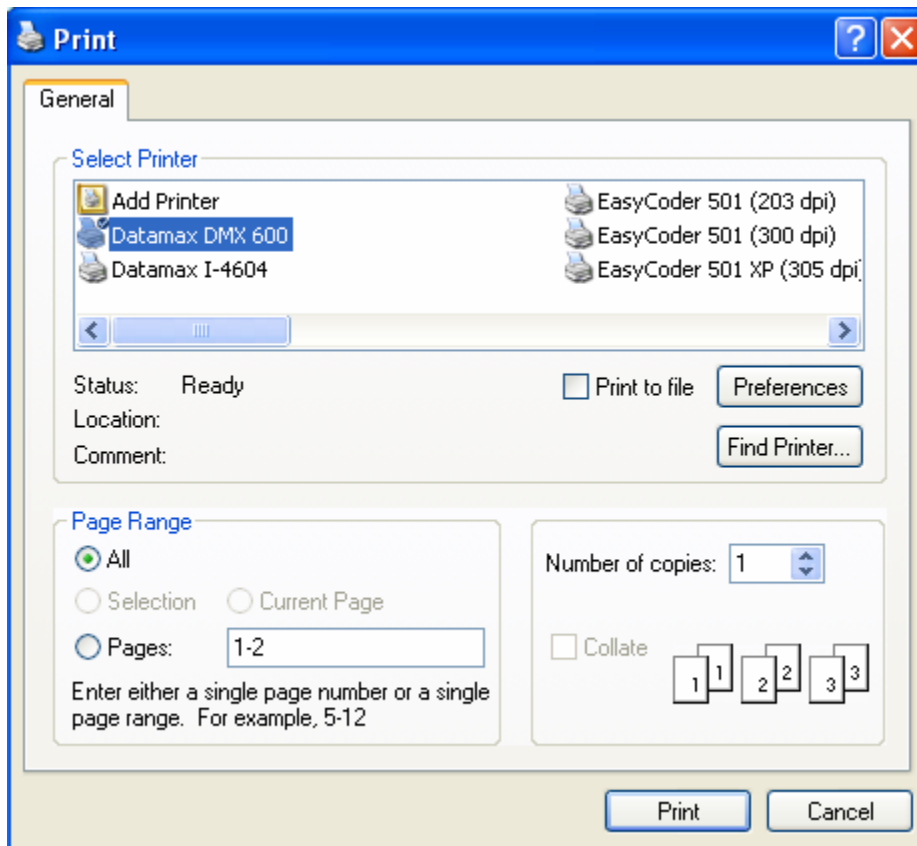
Search (Find): Use this to find asset details in the print area by typing in the detail you would like to search for.



Customize: Use this to set the general look of the print output

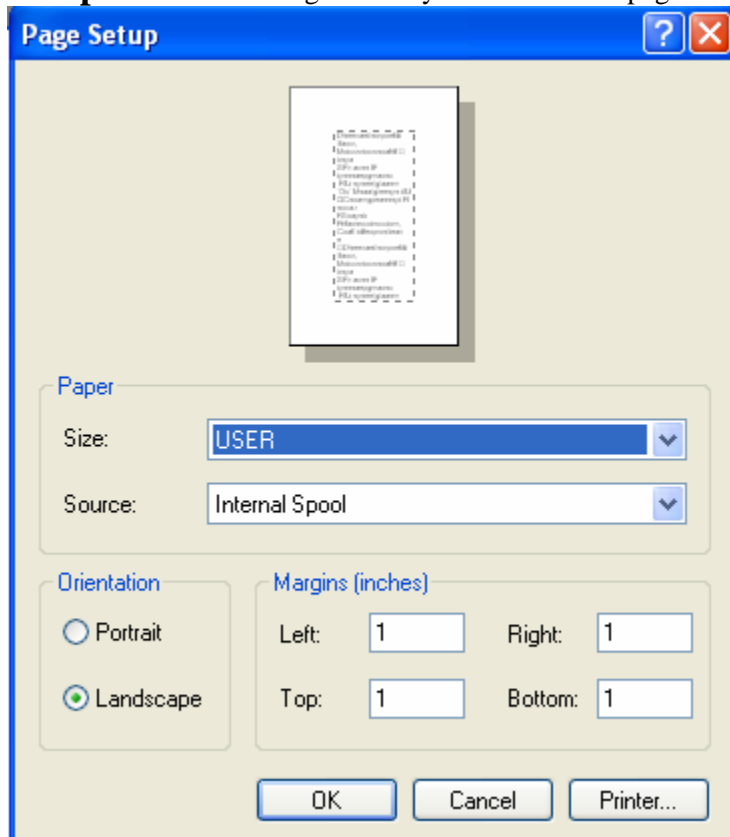


Print ‘Set-up’: This enables you to select the printer and it’s set up options.

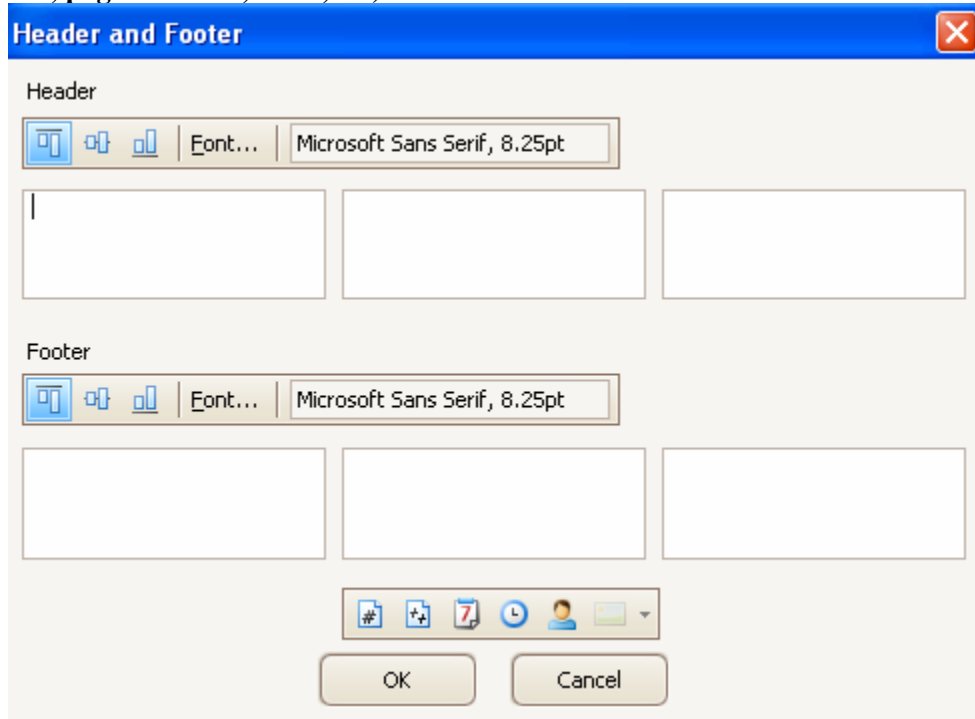


Quick Print: Prints the document to the default printer using the current settings.

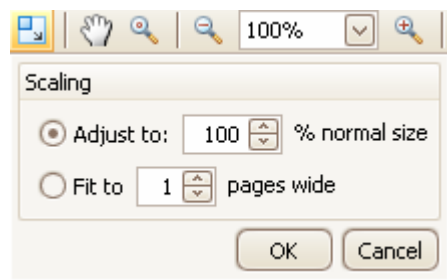
Page Set-up: This settings allows you to define the page setup.



Header & Footer: With this you can define a header and/or footer for the document.
(Text, page numbers, dates, etc)

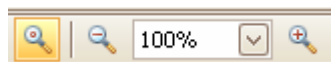


Scale: Adjust the size of the page to be printed.



Hand Tool: Typical Windows tool to move and drag the print preview screen.

Magnification Tool: Magnify, Reduce and Zoom are similar to controls found in other Programs



Previous/Next Page Controls: Jump to first page, go back to previous page, move to next page and jump to last page.



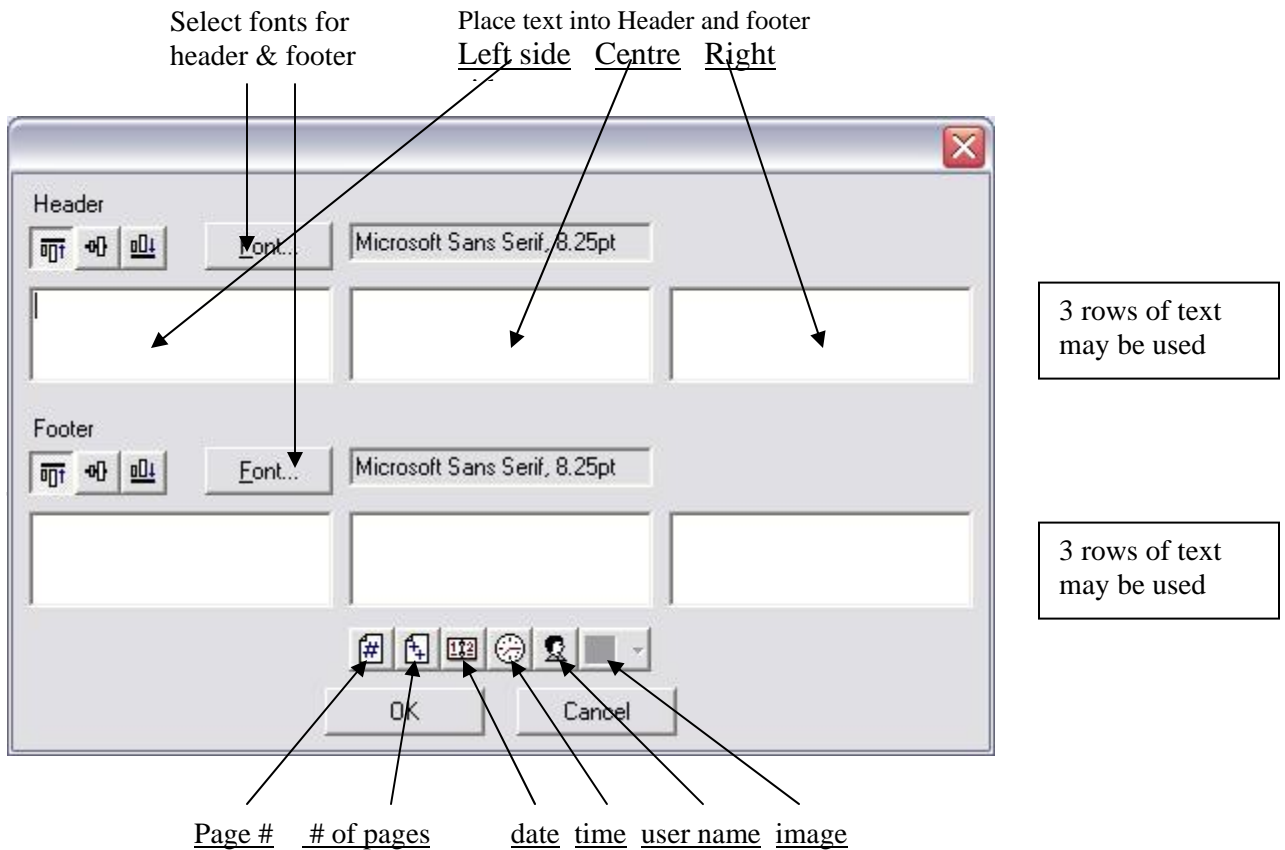
The next Set of ‘Icons’ or function control buttons will not be often used but are powerful.



From left to right these controls are: Multiple Page, Background Color and Watermark. Next comes Export Document, Send ‘Doc’ by email and Exit/Close the Preview. Finally, the drop down list at the end of the tool bar allow you to customize the Print Menu Bar.

Adding a title to your Print out

Left Click on the Header & Footer Icon and the Header & Footer window is presented. This allows you to enter text and other items into both the header and footer.



Enter the text for the Title of the report in the way you want it to print.

Select the options such as print date and page numbers.


Using the mouse pointer, clicking and typing select the placement of the header text and other options.

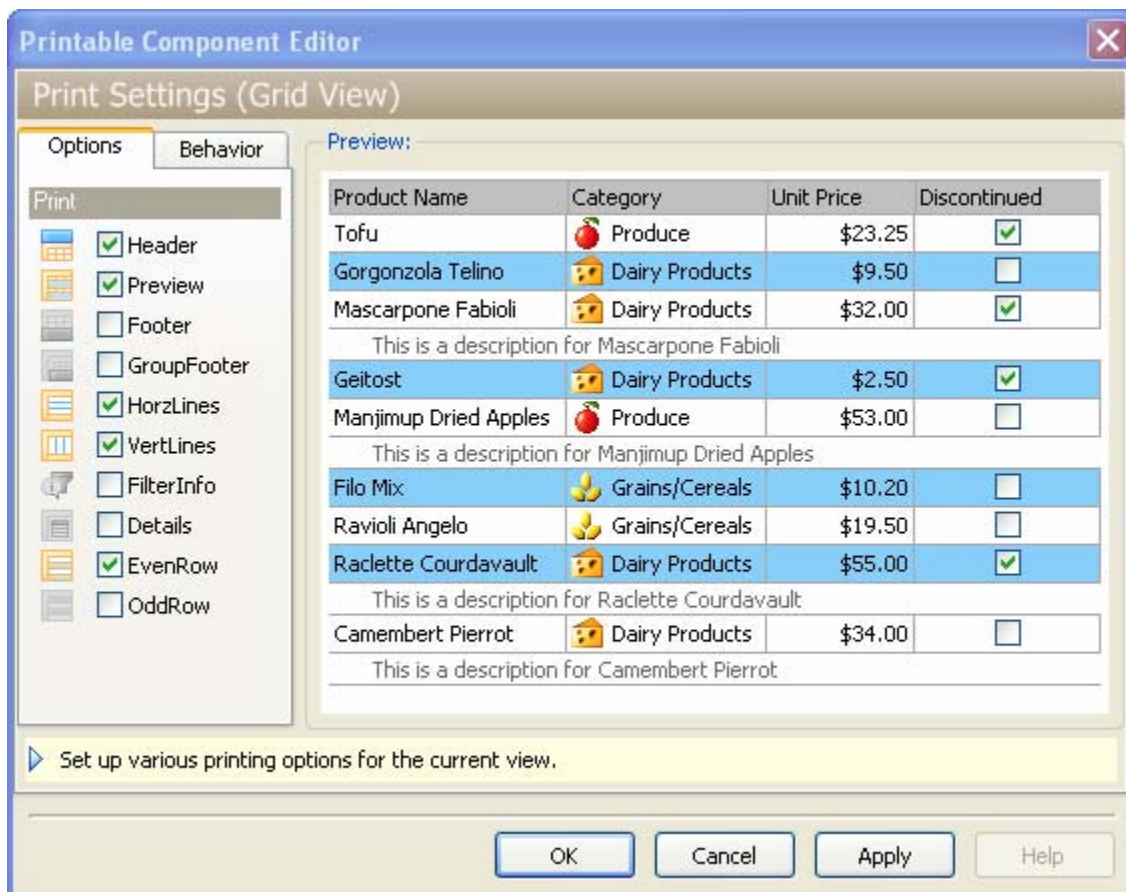
Select the **printer Icon** to print the report to the windows default printer.

Using these tools, a simple printed report could look like the one on next page.

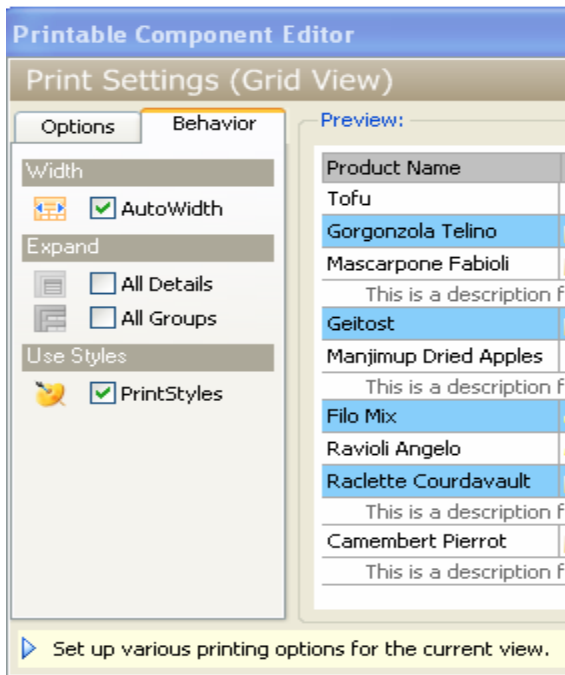
Asset #	Type	Make	Model	Description	Department	Location	Date Acquired	Cost	Memo	Audit Date
11238				New Asset			7/14/2006	\$0.00		1/1/2001
000100				New Asset			6/30/2006	\$0.00		1/1/2001
000101				New Asset			6/30/2006	\$0.00		1/1/2001
000102				New Asset	Accoun...	Geor...	6/24/2006	\$0.00		1/1/2001

You can experiment with the various print control icons to get the look you want for your reports in the Preview window. Place the mouse pointer over the various icons to find out what each controls.

The **customize** icon  calls up a menu (shown below) with visual examples to fine-tune the way your report will print.



The submenu for **Behavior** can be used when you are doing reports that involve **views**; particularly those utilizing the 'group sorting' function, to present data in certain ways.



Using **Behavior** could give you a report looking like the one below.

Asset #	Location	Date Assigned	Type	Make	Department
000109		6/24/2006		testr	
008673	Georgia	6/21/2006		test	Accounting
001105		6/24/2006		ggg	
11238		7/14/2006			
123456		7/12/2006			
001001		6/24/2006			
G203		6/24/2006			
G202		6/24/2006			
G201		6/24/2006			

Set the Margins

If the data columns are wider than the margins can accommodate they can be reset.

Left Click **on the File menu. From the Preview Window.**

Left click **Page Set up. In the page set up window you can set the margins, select the paper size and orientation. You can also set the printer and printer options.**

Left click **OK when done.**

Using a Microvision ‘ROV’ Scanner

AssetTrakker was designed, built and optimized for use with the Microvision ‘ROV’ and legacy ‘Flic’ batch capable scanners. While our software works well without a scanner, a scanner can be a time saving tool.

These scanners have an innovative laser scan engine. The scanners are connected to a computer workstation using a 9-pin serial interface cable with an RCA mini jack on other end for connecting to the scanner. A serial to USB conversion cable is optional to connect the scanner to a USB port instead of a serial port. A fresh set of alkaline batteries can last as long as 12 months (scanning approximately 100 barcodes per day). Two different scanners models are available, the ‘ROV’ scanner and the legacy ‘Flic’ scanner.

To use the scanner, aim it on a slight angle towards a barcode. Press and hold down the trigger button. A red laser line will appear. Guide this laser to cover the entire barcode you wish to scan. A beep is heard and a green light blinks when the barcode is successfully scanned. If you do not get a beep and if the green light does not blink, the scan was unsuccessful. Try again by adjusting the scan angle and repeating the steps above.

Practice: Scan some barcodes. An operator should become comfortable with the scanners use and be able to quickly scan a barcode getting the beep and blink associated with a successful scan.

After practicing, you should ‘CLEAR’ the scanner’s memory of practice scans. You do this by scanning the ‘clear bar codes’ barcode provided in the manufacturer’s scanner manual.

SCANNER USE with AssetTrakker

A great deal of work has gone into integrating the scanner into AssetTrakker Pro. You do not need to use additional software (such as the Scanner Wedge software) to setup and use the scanner with our program. It is pretty much a matter of plugging in the scanner and clicking on the ‘configure’ function.

Batch Mode: When the scanner is not attached to the computer, it is automatically in **Batch Mode**. The user can scan multiple barcodes and have these barcodes saved in the scanner memory. When the connection is re-established with the computer, the scanner will upload the scans it has stored in its memory to the batch window once the user has selected the “Download from Scanner” button.

Real Time Mode: If the scanner is attached to the computer, and if a Real-Time function has been selected (such as Quick Find or Quick Add), a bar code can be scanned and will automatically be transferred to the function window.

Quick Find

In a large database you may need to retrieve information quickly on just one particular asset. This operation requires that you have the barcode number taken from the asset inventory tag. This works in real time mode only.

While in the **AssetTrakker** program

Left click the **Find Asset** Icon  or select Scanner/Quick Find from the Menu

Note this operation can be used without the need to scan the asset number barcode.

When the program requests you to connect the scanner, plug in the scanner cord and

Left click **OK** (or Cancel) if you not using a scanner

Scan the asset barcode. The scanned barcode will be entered on to the screen

Alternatively,

Enter the asset number from the keyboard if you are not using the scanner.

Left Click **OK**

The Asset information is presented in the **Edit Assets** window. Note that from this screen the Asset History table is available.

When you have retrieved the information that you are searching for, or have edited the asset record,

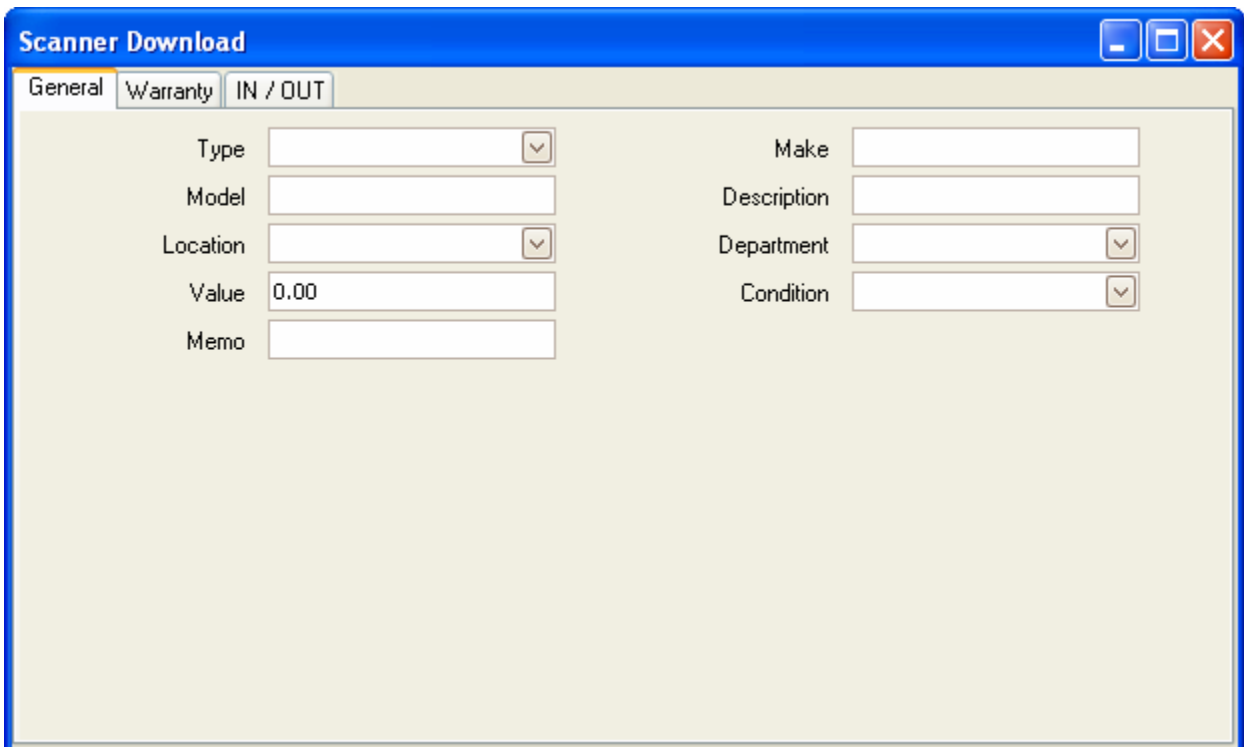
Left Click 'OK 'and the program will return to the Asset View grid.

Adding a number of Assets using scanned information

This is useful when adding a number of identical records because common data is only entered once and a look up list is also available to help.

With the scanner **detached** from the computer, scan the barcodes for the assets to be added. The scanner is automatically in batch mode when not connected to the computer.

Click on the **Scanner** and select the **Batch Add Assets** menu item.



The screenshot shows a window titled "Scanner Download" with a blue title bar and standard Windows window controls (minimize, maximize, close). Below the title bar are three tabs: "General", "Warranty", and "IN / OUT", with "General" selected. The main area contains several input fields arranged in two columns. The left column includes: "Type" (a dropdown menu), "Model" (a text box), "Location" (a dropdown menu), "Value" (a text box containing "0.00"), and "Memo" (a text box). The right column includes: "Make" (a text box), "Description" (a text box), "Department" (a dropdown menu), and "Condition" (a dropdown menu).

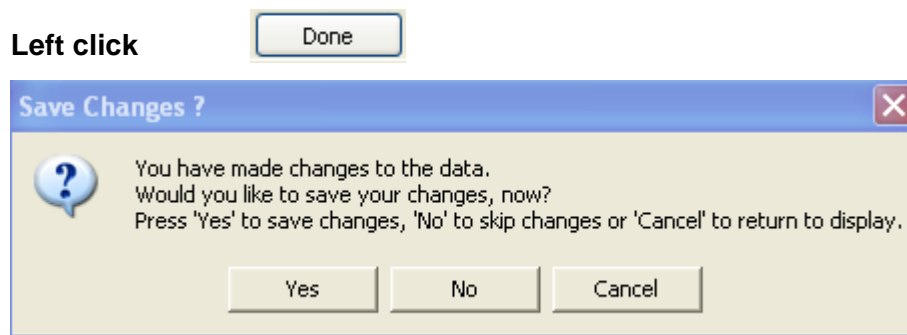
The Scanner Download window appears. *Note that the fields that appear and their order can be set

by you. This is described in the manual under **Customize Forms** ('Edit Asset Entry Form', 'Add Asset Entry Form', 'Batch Add Assets Form', 'Batch Edit Assets Form').

Fill in and complete each field containing the information that will be the same for all of the assets to be added as a batch. If you leave a field empty, an empty field will be entered.

Complete the fields and
Left click 

The program downloads the data in the scanner's memory and a **Batch Listing** window appears with a row for each barcode scanned. The common data is included in each row. You may edit the fields as needed to enter additional data that varies from asset to asset such as 'serial number' or 'description'. When your data is correct,



Auditing Assets (Batch handling)

This is something most people will want to implement as a yearly audit ensures you have what you think you have as well as letting staff know you are keeping track of assets. Auditing with pen and paper takes much more time than if a barcode scanner is utilized.

For auditing you must select the column headings 'audit date' and likely set this for 'keep history'. In addition you may wish to input and track the 'auditor' and perhaps 'audit scanner Id #' although these 'fields' are not totally necessary.

*Note that you can print off a list of assets and manually audit assets. Later enter details about audited assets into AssetTrakker.

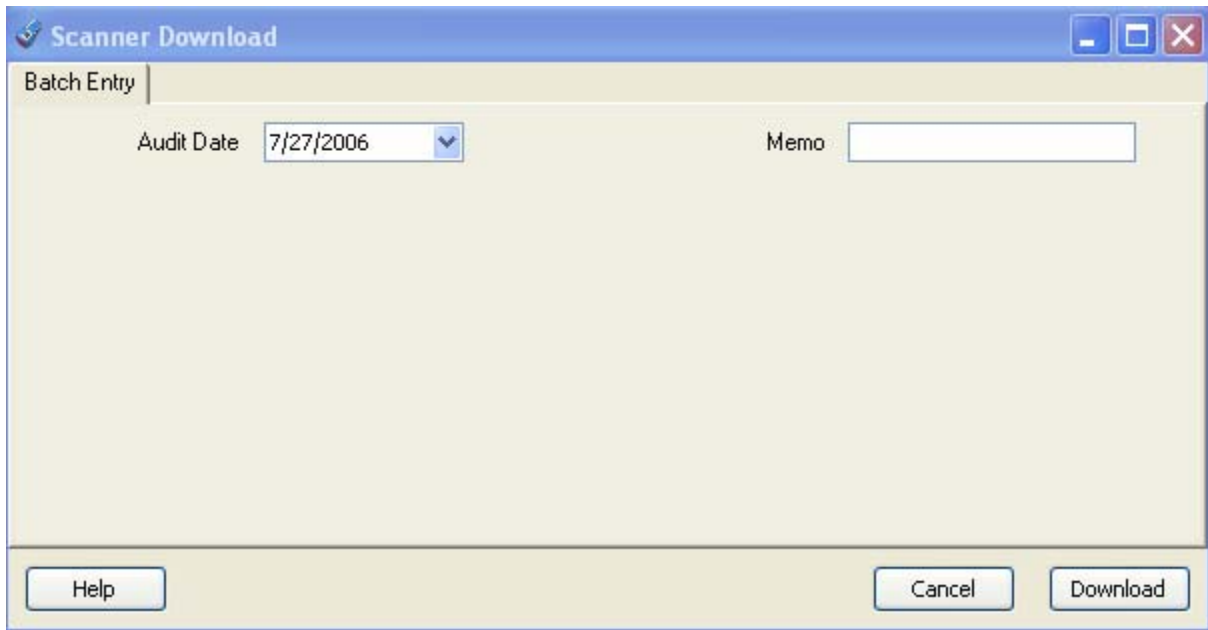
Downloading and posting the results of audit scans is done in the same manner as "Editing Assets using scanned information" as explained below.

Editing Assets using scanned information

This is useful when moving a number of assets to a new department or location

With the scanner **detached** from the computer, **scan** the barcodes of the assets to be changed. The scanner is automatically in batch mode when not connected to the computer.

In the Menu click on Scanner (or on the Scanner 'ICON') **and select** 'Batch Edit Assets'. Next select the appropriate form from the list and click **OK**.

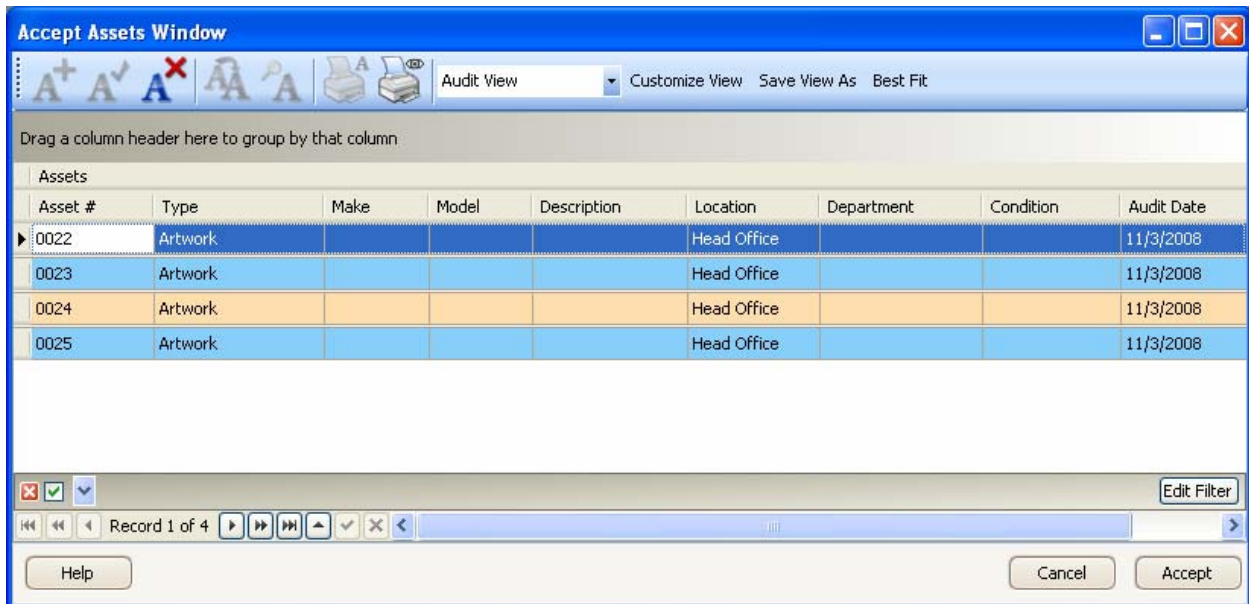


A Scanner Download window will appear. By Customizing this form to show different fields, you can make bulk changes to data attached to the batch scanned assets. This is explained in detail in [‘Customizing Asset Data Entry Forms’](#) .

Left click

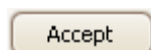


The program will download the data held in the scanner memory and a Accept Assets Window will appear with the selected assets in the editable view.

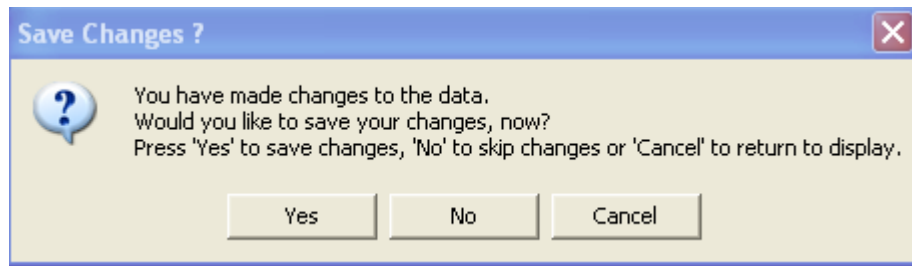


Make the needed changes and when your data is correct,

Left click



After confirming that the records are to be added to the database, the changes are added to the database.



Accessing from Network Drive

Sharing a database with other users on a network is easy - just place the folder containing the database file onto a networked drive. Anyone who has access to the drive and a registered copy of AssetTrakker installed on their workstation will be able to retrieve the information. You can set a password and user access privileges to the database through your network security administration.

Importing Asset Data

This function is to speed up the initial set-up of a new database. First you have to get your existing data into a format ready to import into AssetTrakker.

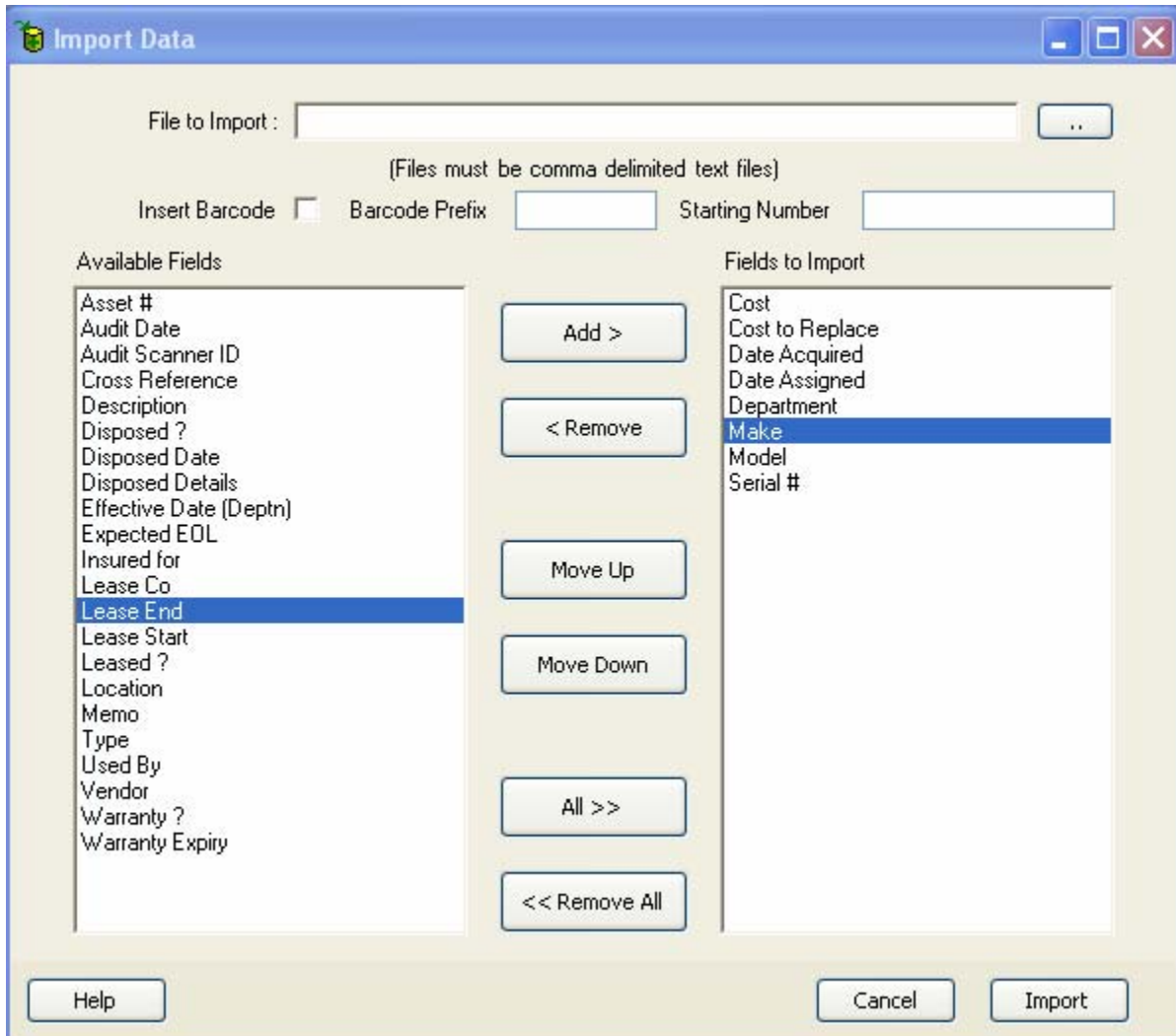
Export your Existing Asset Information into a CSV file that AssetTrakker can access.

Do not include headings in the export. Do not include incompatible formatting. Make sure each field is enclosed with quotations. Each field must be separated by commas. Each new line represents one asset record to be imported. Make notes of the column names and their order as they will have to match with the column names and order used in AssetTrakker.

You can either change the column heading names in your 'excel' spreadsheet or modify the names in AssetTrakker to match. See [To Change a field name](#) for instructions on changing names of fields/column headings.

IMPORTANT: If you are importing asset/barcode numbers, these numbers MUST be in the same format as will be used within AssetTrakker. Do not import barcodes with 4 digits (0001) if you intend on using 5 digits (00001) because the 4-digit barcodes will be padded in order to format the barcodes into a 5-digit barcode.

Select the Import function in the File Menu. The Import Data Window will appear.



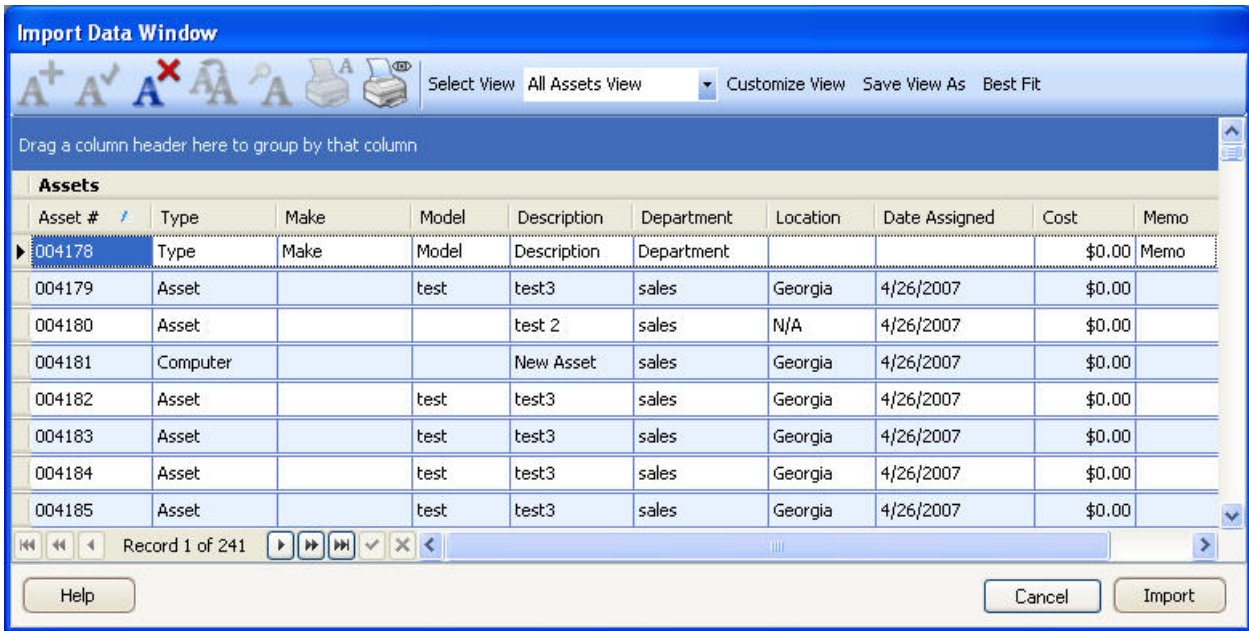
Locate the CSV file using the browse key (..) . If you are not importing bar code numbers along with other columns of data and wish to assign numbers to these imported assets then you check off 'Insert Barcode' and enter prefix, if any, and starting number.

The next step is to arrange the AssetTrakker system to recognize and properly handle the data in your CSV file.

You must arrange the column headings in the Import Data window to match, in order, those coming in from your CSV file. The top Column Heading/ Field in the right list section of the window corresponds to the first column (the far left column) in your CSV (Excel) file.

You move column headings/fields from the left, listing of available ones, to the right by left clicking on the field you wish to change and then using the Buttons in the centre of window to move left-right and arrange in required order.

When the list is complete and in the correct order Click the 'Import' button and the Import Data Window below will appear which you can then edit prior to clicking 'Import' to add this data to your database. Data is not entered into Database until the 'Import' button on Import Data Window is clicked.



Backup System

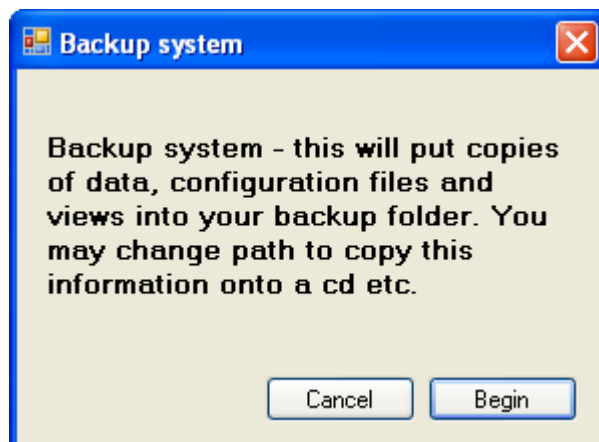
Backing up

SQL Express, the database engine in AssetTrakker, automatically updates your database as changes are made. Unlike other types of program such as word processing or spreadsheets, you don't have to save prior to exiting.

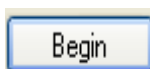
If you do perform a 'Save As' or 'Backup' (which also backs up your configuration of field selections and custom entry windows) then AssetTrakker will close and have to be reopened. This is necessary as it's the way SQL Express must work to ensure data integrity.

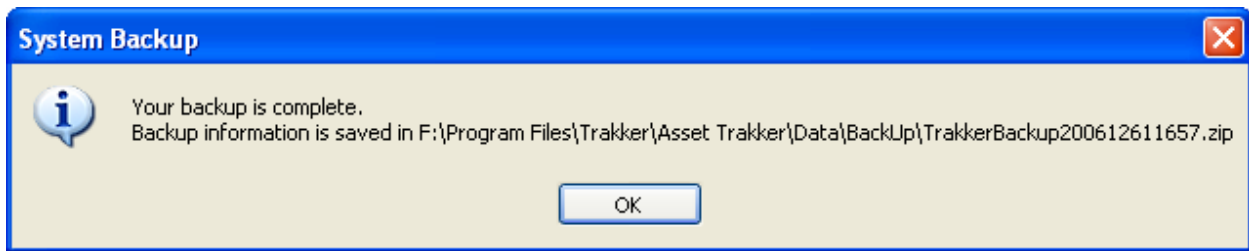
*Note that this will backup your database into a separate AssetTrakker Folder (or where you direct it to be put) in a .zip format and easier/faster to save and access later if there is ever a corrupted database file. Unzip is built into program so easy to perform.

- Go to** the **Menu Bar** and
- Select** **System**
- Select** **Backup System** in the drop-down list



Left Click

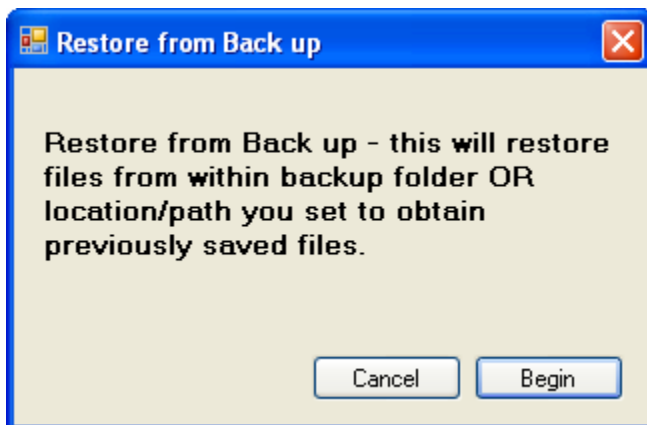




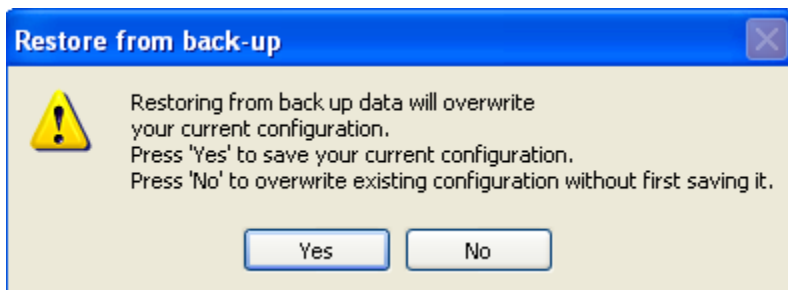
AssetTrakker will then close and have to be reopened.

Restore from backup

- Go to** the **Menu Bar** and
- Select** **Tools**
- Select** **Restore from backup** in the drop-down list



Left Click on Begin



Addendum 1: Mouse and Keyboard

(Special mouse and keyboard entries to assist in speed of program access and function.)

Action	Effect
Left Clicking in a data cell	Will focus on cell so it can be edited.
Clicking a data row's Indicator cell	Moves focus to the corresponding row preserving the column focus.
Pressing the DOWN ARROW key	Moves focus to the next row preserving the column focus. If an expanded master row is focused, moves to the detail View restoring its focused cell/row. If the last row of a detail View is currently focused, moves to the next master row within the master View.
Pressing the UP ARROW key	Moves focus to the previous row preserving the column focus. If the currently focused row is under an expanded detail, navigates to the detail View restoring its focused cell/row. If the first row of a detail View is currently focused, navigates to the corresponding master row.
Pressing the CTRL+UP ARROW key	If the Auto Filter Row is visible and the top data row is currently focused, moves focus to the auto-filter row.
Pressing HOME key	Moves focus to the first cell within the current row.
Pressing the END key	Moves focus to the last cell within the current row.
Pressing the PAGE DOWN key	Moves row focus one page down preserving the column focus.
Pressing PAGE UP key	Moves row focus one page up preserving the column focus.
Pressing the CTRL + HOME key	Moves focus to the first cell within the first row.
Pressing the CTRL + END key	Moves focus to the last cell within the last row.

Operations Acting upon Cells

Action	Effect
ENTER	Pressing switches in/out of edit mode
F2	Pressing switches in/out of edit mode
ESC	Closes the active editor discarding changes made.

Operations Acting upon Rows

Action	Effect
TAB	Moves focus to the next cell within the focused row
SHIFT+TAB	Moves focus to the previous cell within the focused row
Clicking a row holding the SHIFT key pressed	Selects all rows between the clicked and the previously focused ones. The previous selection is cleared.
Pressing Shift and clicking on data rows indicator cell. (left most cell in any row)	With focus in this cell while holding down shift key you can use up or down arrow key to select range of rows.
Pressing the SHIFT+UP/SHIFT or DOWN key combinations. Can be repeated	Select a page range of rows. When starting such operations, the previous selection is cleared.
Clicking a row holding the CTRL and SHIFT keys pressed	Selects the range of rows between the one clicked and those previously focused. The previous selection is preserved.
Pressing the CTRL+SHIFT+UP/CTRL+SHIFT+DOWN key combinations	Select a continuous range of rows. The previous selection is preserved.
Clicking a row indicator cell and dragging up/down	Select a continuous range of rows. The previous selection is cleared.
Pressing the CTRL+A key combination	Selects all rows within the View.

Applying sorting, by the values in columns, within grid Views

Action	Effect
In grid Views, clicking a column header	Sorts by the column's values by replacing any existing sort conditions.
Selecting the " Sort Ascending "/" Sort Descending " item of the column header context menu	Applies sorting by this column's values in ascending/descending order. Existing sort conditions are preserved.

Copying Selected Records to the Clipboard

Action

Effect

Right click in cell or row to obtain drop down menu and select 'copy'

Copies the selected records to the clipboard as text. These could then be pasted into an email or word doc.

Filtering to present data in different order/ranking etc., in Grid Views

Action

Effect

Clicking a **filter button** within a grid View's column header.

Invokes the **filter dropdown**. Note: if filtering is applied, the filter dropdown only displays values that match the filter criteria.

Clicking on red X (in box) at bottom left of view window.

Clears all the filtering conditions applied to a View.

Group View Data

Mouse operations

Action

Effect

Dragging a **column header, or number of headers** from the **column header panel** to the **group panel**

Groups the View's data by the column's values.

Dragging a **column header** from the **group panel** to the **column header panel**

Ungroup the View's data and displays the column's values.

Moving a **column header** within the **group panel**

Changes the group order.

Expanding and Collapsing Rows within GROUP SORT VIEWS

Keyboard

Key

Effect

RIGHT ARROW Expands the focused group row.

LEFT ARROW Collapses the focused group row.

CTRL+PLUS Expands the focused group/master row.

CTRL+MINUS Collapses the focused group/master row.

Mouse

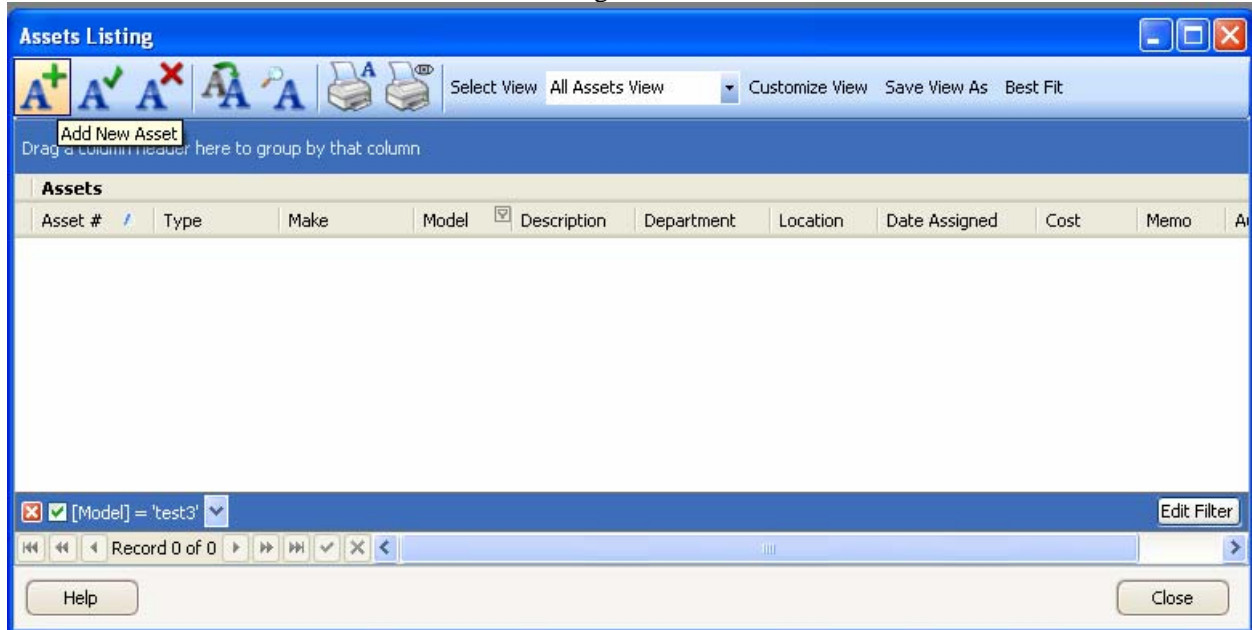
Action

Effect

Clicking a group expand button	Expands/collapses the corresponding group row and focuses it.
Clicking a master-detail expand button	Expands/collapses the corresponding master row and focuses it.
Double-clicking a row indicator cell	Expands/collapses the group/master row.
Double-clicking a group row	Expands/collapses the group row.

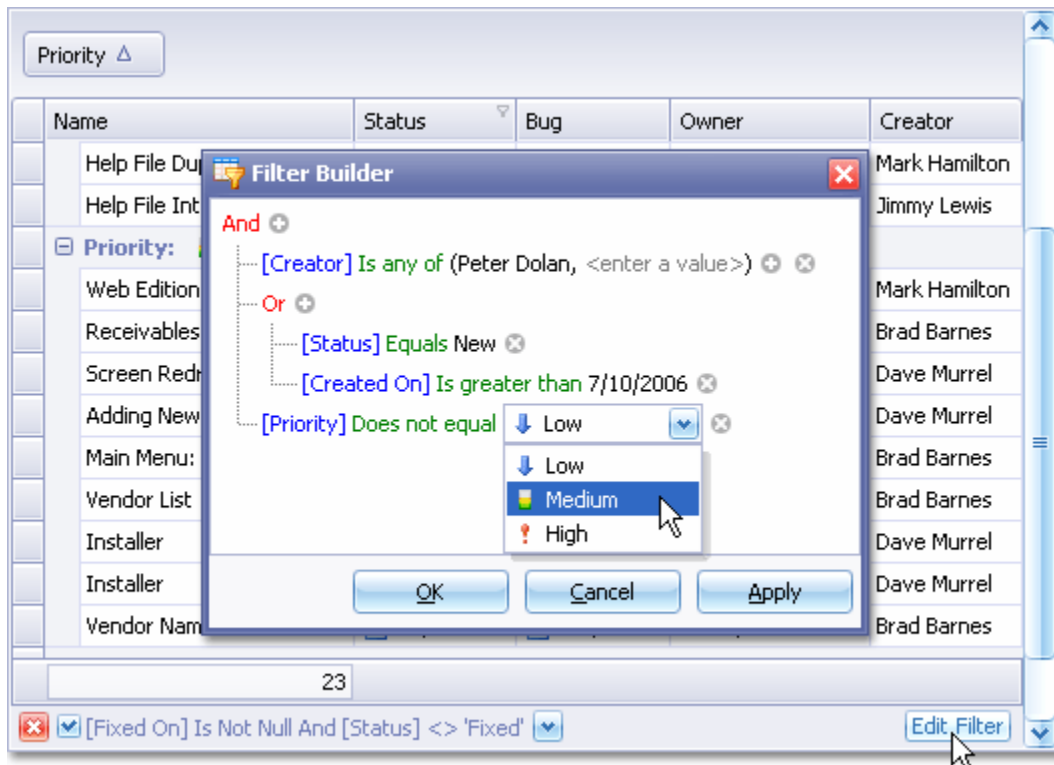
Addendum 2: Programmable Sorting Filter

You will see at the bottom right of Asset Listing Windows an 'Edit Filter' button. Left click on this 'Edit Filter' button to access advanced filtering.

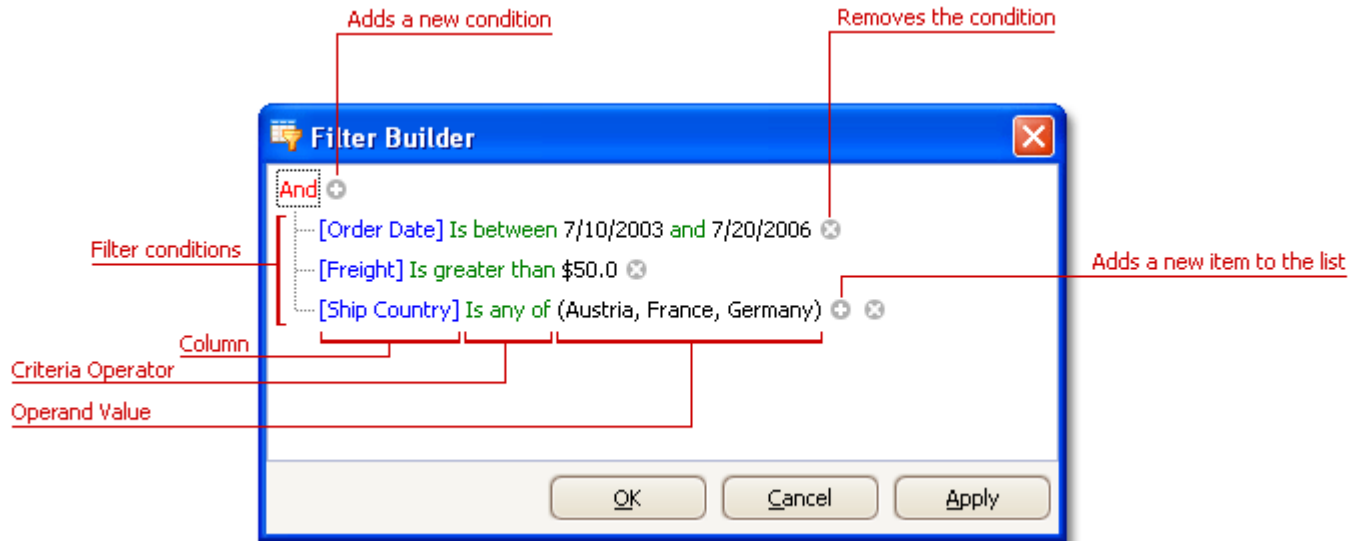


Why use Advanced Filter Editor

If you need total control over the filter condition, use Filter Editor. You will be able to build filter criteria of any complexity - create any number of conditions and combine them in any manner using any logical operator. Without programming and by saving 'custom views' you gain great power.



Filter Editor



The **Filter Editor** provides the context menu that are invoked you click the group's operator (see the image below).



This menu allows you to do the following:

- Specify the group's logical operator (**And**, **Or**, **Not And**, **Not Or**);
- Add a new condition to the group;
- Add a new logical group;
- **Clear All** - removes all conditions. This menu item is displayed for the root logical group.

Remove Group - removes the focused logical group. This menu item is displayed for the child logical groups.

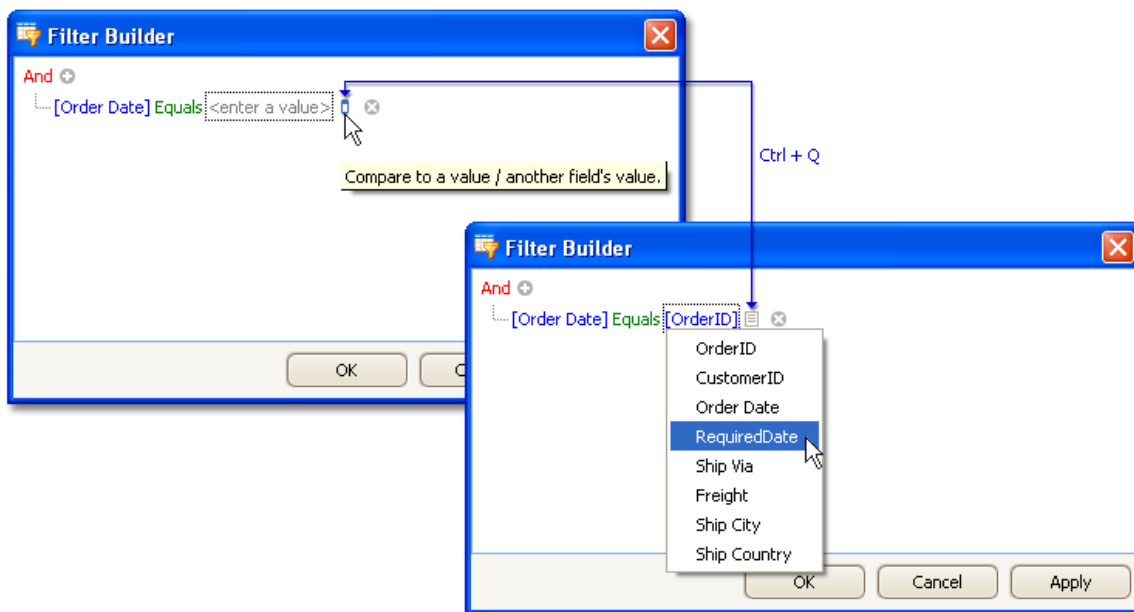
Shortcuts

Navigating Through Elements

Shortcut	Description
UP ARROW	Moves focus to the previous condition.
DOWN ARROW	Moves focus to the next condition.
LEFT ARROW	Moves focus to the previous element within the focused condition.
RIGHT ARROW	Moves focus to the next element within the focused condition.

Filter Criteria Editing

Shortcut	Description
F2	Activates the focused operand's editor.
ENTER	If the focused element is an operand, activates its editor or closes it, saving the changes made. Otherwise, the element's context menu is shown.
SPACE	If the focused element is not an operand, shows the element's context menu. Otherwise, the operand's editor is activated and its content is replaced with an empty string.
A character key	Activates the focused operand's editor and replaces its content with the typed character.
ESC	Closes the active editor discarding the changes made.
ALT + DOWN	If the focused element is an operand, its editor is activated. Otherwise, the element's context menu is shown.

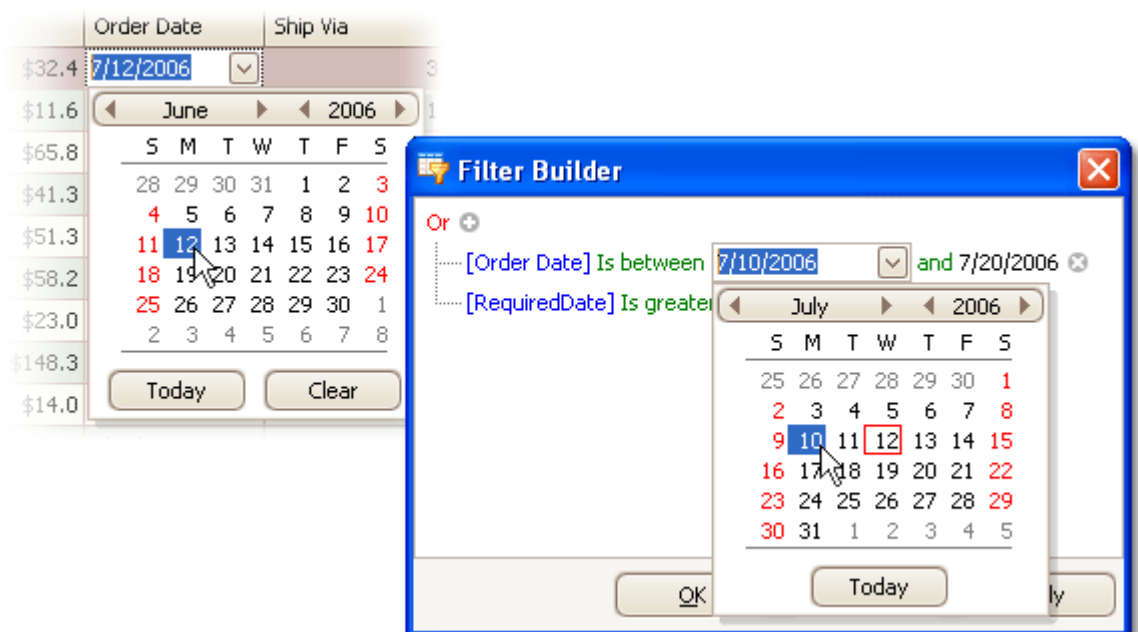


Managing Filter Conditions

Member	Description
ADD	Adds a new condition to the logical group being currently focused.
INSERT	
DELETE	Deletes the condition or group being currently focused. When deleting a group, all its conditions are also removed. Once the condition or group has been deleted, its previous condition or group is focused.
SUBTRACT	
CTRL + INSERT	Copies the focused condition/group to the clipboard.
CTRL + C	
CTRL + V	Pastes the condition/group from the clipboard to the end of the current group and focuses it.
SHIFT + INSERT	
CTRL + X	Cuts the focused condition/group.
SHIFT + DELETE	
CTRL + ADD	Creates a new logical group and adds it to the group being currently focused.

Important to know

- The type of the editor that is assigned to the corresponding column determines the editor used in value boxes. For example Date field will be different from a Text field.



Addendum 3: Column Headings Worksheets

To make the best use of your time and effort setting up the AssetTrakker program for your use you will need to decide what data you will record. You can avoid searching for invoice copies at a later date if you have the correct information where you can search for it on your computer. To assist you in deciding which columns you will want to set up, below is a list along with notes on their likely use.

Note you can draw line thru the preset 'Data Field' name and under it write the name you want to set for that data field to assist in process of activating and setting 'data fields' you want in your 'solution'.

Remember when changing names of 'fields' that you can't use a 'date' type field for 'text' or 'boolean'.

<u>Data Field</u>	<u>Brief explanation</u>	<u>Field Type</u>	<u>Want</u>	<u>Notes</u>
Asset #	Asset identification number Usually the barcode #	System	YES	
Assigned To	Person in charge of asset	Text with Lookup		
Audit Date	The date the asset was last officially identified	Text		
Audited At	Where Asset was when Audited	Text		
Auditor	Record name of person who performed audit.	Text		
Business Use %	Used if an asset is not used full time by the business	Whole Number		
Cross Ref	Perhaps to cross reference to some earlier asset #	Whole Number		
Condition	Present condition	Text with Lookup		
Cost	Total cost of acquiring an asset.	Decimal Number		
Cost to Repl.	An estimate of the cost of replacing an asset.	Decimal Number		
Date Acquired	Date the asset was acquired	Date		
Date Assigned:	Date assigned to a person or department	Date		
Date Due /Returned	When asset expected back	Date		

Department:	The department using the asset.	Text with Lookup		
Description	Detail additional to make, model, and serial number.	Text		
Disposed?	Check box that shows an asset has been disposed of.	Boolean		
Disposed Date	Date asset was disposed of.	Date		
Disposed Detail	Notes on how and where an asset was disposed of.	Text		
Effective Date	For some other asset attribute?	Date		
Entered by	Person or department entering information	Text with Lookup		
Expected EOL	The date when the asset will no longer be useful.	Date		
Funded by	Source of funds used to acquire the asset.	Text		
Image	A digital image of the asset	Blob		
Lessor	The name of the company from which an asset is leased. Do not rename– System use	Text		
Lease End	Date the lease ends SYSTEM USE ONLY	Date		
Lease Start	Commencement date SYSTEM USE ONLY	Date		
Leased?	Check box indicator SYSTEM USE ONLY	Boolean		
Location	Where the asset is	Text with Lookup		
Make	Manufacturer's name.	Text		
Memo	Additional information not in another field.	Text		

Model	The model name of an asset	Text		
OUT?	For tool/equipment in/out	Boolean		
Recovered Value	Net proceeds of the disposal of an asset.	decimal		
Serial #	Manufacturers identification number	Text		
Taken By/ IN From	Used in Tool/Equipment In/out type tracking	Text with Lookup		
Type	The broad type of asset	Text with Lookup		
Used by	The person holding or using the asset	Text with Lookup		
Value	Could be insured value or book value or actual.	Decimal		
Vendor	The company you bought from and may need to approach for replacement	Text		
Warranty?	Is asset covered by a warranty? 'Check box ' SYSTEM USE ONLY	Boolean		
Warranty Expiry	Date warranty (service agreement) expires SYSTEM USE ONLY	Date		
There are many Data fields left For user to name and use	5 Decimal (currency), 9 Integer (whole number) 2 Date, 9 Text, 4 Boolean			
User Defined (type over name to get what you want)	Select the type of Field Date; Text etc			

Addendum 4: Tool/Equipment Tracking

The batch scan capability of portable scanners and flexibility of AssetTrakker does a great job of tracking the movement of equipment and tools from stockroom/storage to jobsite or individual. While some may wish to use AssetTrakker for only Equipment/Tool tracking you can use it for both management of fixed assets in addition to tool tracking.

A fuller explanation of all program operation, control keys, printing and viewing data is included in our AssetTrakker Manual and in [Addendum 4](#). Tool Tracking assumes knowledge of AssetTrakker program functioning gained from reading the provided manual and practicing with trial data supplied.

We have set up in the 'Trial' Trakker Database a batch form called 'Equipment IN/OUT' that, with modification, can be used/modified as a base for designing your own input form.

Step 1:

Choose the column headings (data fields) you want

[Column Headings/Data Fields worksheets](#) are found in Addendum 3 for printing off to assist you in planning your Tool Tracking solution

Below are listed the fields/column headings you should consider. Certain fields marked with * must be selected made active for too/equipment tracking.

***Taken by/Received from:** Required if you wish to track who was issued or who returned an item. This field has an associated drop down lookup table.

***Out? (ticked):** This is a special type of (Yes/No) field which lets the program know whether the out to employee/jobsite. It is a true or false Boolean field type. When not ticked the equipment is in stores/warehouse.

***Asset #:** (this would be the number generated when you scan a barcode) and is necessary for both Asset as well as Equipment Tracking.

***Used by:** May wish to change 'used by' to a title more in line with your use, 'field rep. Etc.'. (Has lookup table attached)

Location: So you can track where the equipment or tool is going 'Jobsite 1', 454 Main, etc. Useful information to have in separate searchable column heading if a lot of equipment is assigned often to users at a specific site. Has lookup table attached.

Department: Similar use as 'Location' that you might wish to use or track.

Description: It's likely you'd want a description of the asset although perhaps Make/Model might suffice. For example 'phase meter'. (A text field)

Value: If you use this field/column heading then you could include it in the custom view you'll be printing off when someone signs out tools/equipment. (A number field)

Condition: If you use this then it could be incorporated in custom view printed off upon signing out or in equipment/tools.

In addition to the above column heading (Fields) you may decide to use other column headings/fields in your program. A full list is found in [Addendum 3](#) of this manual.

Selecting your fields (column headings)

Having decided which fields you will be using, you need to select them for use.

- Left Click** 'Customize' in the Menu Bar
- Select** 'Fields Selection' in the menu
- Select** the fields you want to show and use.
- Choose** from the list column headings desired. **You can change the 'field name' that will appear by typing over the current name listed under 'User Defined Title'.**
- Left Click** the box to place a ✓ in the Field Is Used column to activate the fields you will be using.

User Defined Title	Field Is Used	Keep History	Data Type	Field Le...
▶ Asset #	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Text	50
Audit Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date	0
Audit Scanner ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Text	50
Auditor	<input type="checkbox"/>	<input type="checkbox"/>	Text	50
Business Use %	<input type="checkbox"/>	<input type="checkbox"/>	Single	0
Class	<input type="checkbox"/>	<input type="checkbox"/>	Long Integer ...	0
Condition	<input type="checkbox"/>	<input type="checkbox"/>	Long Integer ...	0
Cost	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Decimal	0
Cost to Replace	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Decimal	0
Cross Reference	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Text	50
Date Acquired	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Date	0
Date Assigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date	0
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Long Integer ...	0

Setting up the Audit Trail (Keep History)

You may wish to track changes made to some fields, such as Assigned Department, so that an audit trail can be maintained.

Left click on the box in the Keep History column to include the field. With the field will have history details kept and with (blank) it will not be kept.

To Change a field name

Left Click in the 'User Defined Title' field.
Change the name. The usual text edit functions can be used
Move the cursor out of the field and the change is saved

Pay attention to the Data Type so that you do not try to change a date field to hold text or currency information.

Click  to complete the selection.

Step 2:

Setting up the 'IN/OUT' Batch Entry Form screens for data entry/printing of assets coming in or leaving.

To customize the Batch Entry Form proceed as follows.

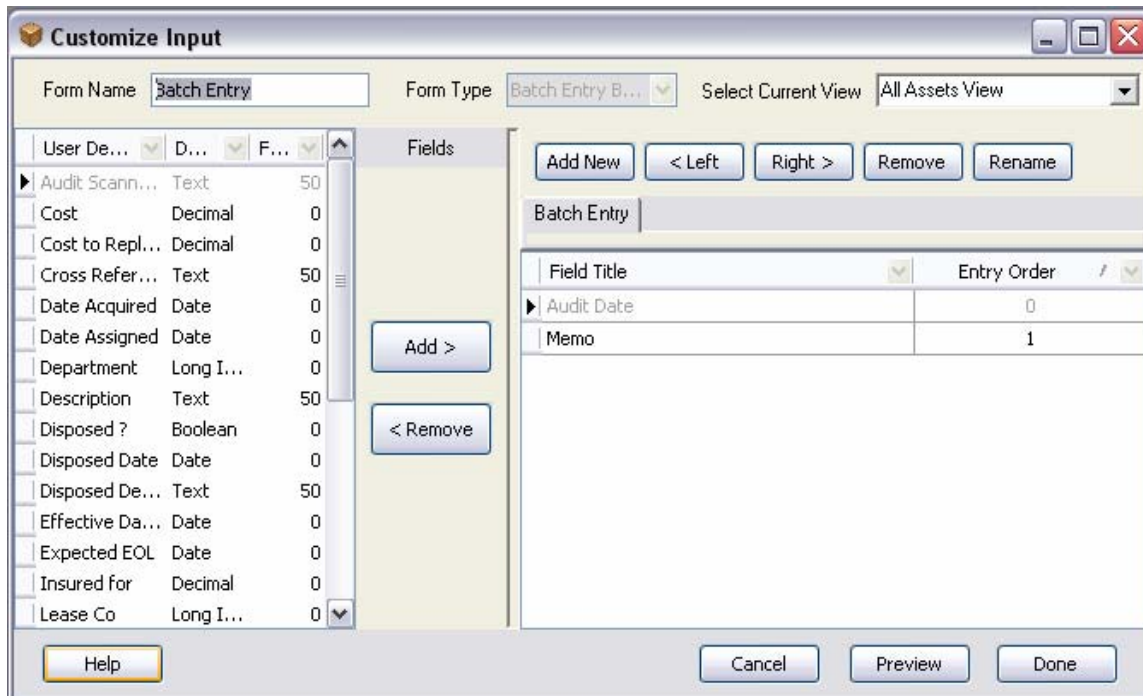
This process is accessed through the drop down menu under Customize/Forms Customization at the top of the program window. *You may wish to name and save a custom asset view and then select this view (box at top right on Customize Input Window). See Saving your custom built 'Views' on [page 31](#) in this manual on how this is done.

Left click on Customize (in Menu Bar) and

Left click on Form Customization

Left Click on Batch Entry in the list

Left Click 



Field Title	Entry Order
Audit Date	0
Memo	1

In the **Customize Input** window you will make the **Batch Entry** window work to your needs by choosing the fields that will show on the form and the order they appear.

Fields shown in the **Left** panel are the fields available for use.

Fields in the **right** panel are those selected for the form.

The **Entry Order** column shows numbers commencing at 0. This determines the position of the fields in the **Batch Entry** window. When you look at the **Batch Entry Form**, you will see the user-defined tabs on the upper portion of the window and the user specified fields for the currently selected tab on the lower portion of the window. Fields are laid out in to two columns. The top left is position 0 the top right is position 1. Fields are listed in sequence according to their assigned **Entry Order** (position) number. Those fields with even **Entry Order** numbers will appear in the left column while those fields with odd **Entry Order** numbers will appear in the right column.

Between the two columns are two buttons to add or remove selected fields. In other words, fields can be included or excluded as part of the user defined 'Batch Entry Form'.

Left Click on the field you wish to add or remove.

Left click  or  as appropriate.


The selected field will move to the opposite panel.

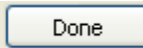
When the fields in the form change the sequence will automatically change. When you have the fields that you want on the tab that you are editing you'll likely renumber to place in order you want.

Re-number The **Entry Order** column to the order you want. Over type the current numbers with the revised list.

Sort the list by **Left Clicking** the column header you can see the revised sequence.

Preview the window

Left Click  to see what your revised **Batch Entry Form** window will look like.

If all is OK, in the **Preview** window **Left Click**  and do the same in the other windows until you are back to the **Grid View**.

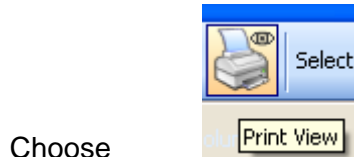
Now when you open the **Batch Entry** windows either to move tools in or out and you will see that the form contain the fields you want and in the best order for your needs.

Step 3

Printing hard copy record of tools in/out

What you print are screen views. **The Screen View/Report can be formatted with appropriate headers and footers, if needed, by using the 'Print Preview' found under 'File' in menu bar.** *Print formatting is saved/attached to the view used, thereby saving you repeating efforts the next time this is used. This is another reason why we made it easy to rename and save custom views for later use.

Prepare the information in the grid window to obtain what you would like to print. If you wish, you can save this format as a specially named 'custom view' for use again later.

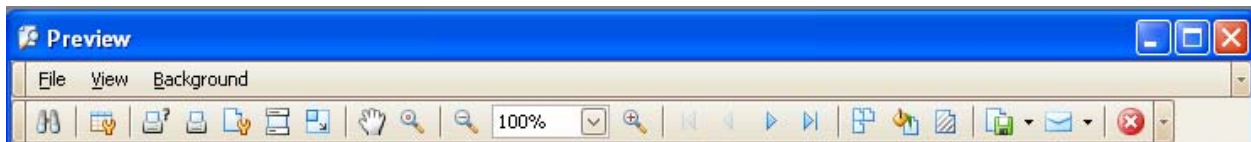


A preview 'Print Preview Window', will appear showing you how the tools in/out view will look when printed.

Asset #	Type	Make	Model	Description	Department	Location	Acquire Date	Acquire Cost	
11238				New Asset			7/14/20...	7/14/2...	\$0.00
000100				New Asset			6/30/20...	6/30/2...	\$0.00
000101				New Asset			6/30/20...	6/30/2...	\$0.00

To set Headers and Footers as well as fonts, Use the 'Preview Menu Bar' use the:

Print Preview Window Menu and Icon Control Bars



Scroll over 'icons' with mouse pointer and name of control will 'pop up'. Name does indicate pretty clearly what the control will do to add print layout. Screen shots of what you get when you click on an icon make this even clearer and are all shown on following pages.

See ' [Printing Reports](#) ' in manual for full explanation of print functionality

Addendum 6: Security User Roles Permissions

If you decide to implement user role permissions we suggest you first familiarize yourself with AssetTrakker and how it functions. This familiarity will make setting access options much easier because you'll understand what you are blocking a user from accessing and why you might wish to do so.

How it works. AssetTrakker Pro provides for the creation of user accounts and the assigning of specific access login levels to each user account. This gives the system administrator complete control by setting who has access to specific areas of the program including asset data, system information and system functions.

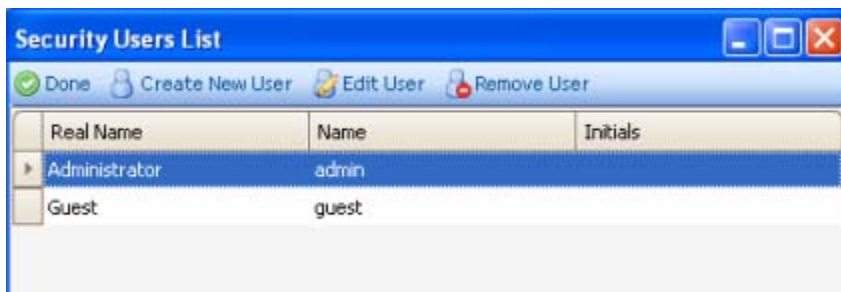
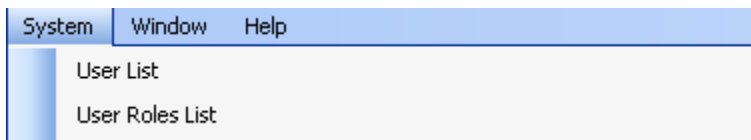
Security User Roles

In AssetTrakker Pro, login levels are set by the administration and assigned to one or more Security User Roles. The administrator creates Security User Roles and allows or blocks access to AssetTrakker program functions by applying conditions to various 'TASKS'.

A task can be thought of as a specific area or function within the program. Each task is set using one of four access options, which controls how a user interacts with this task.

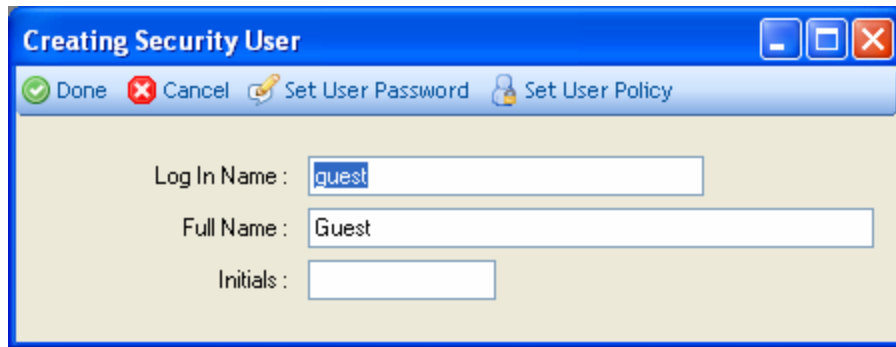
Creating/Editing/Removing Users

Users are created and edited through the **User List**, which is accessed by selecting **User List** from the drop down menu that appears upon clicking on **SYSTEM** in Navigation Bar.



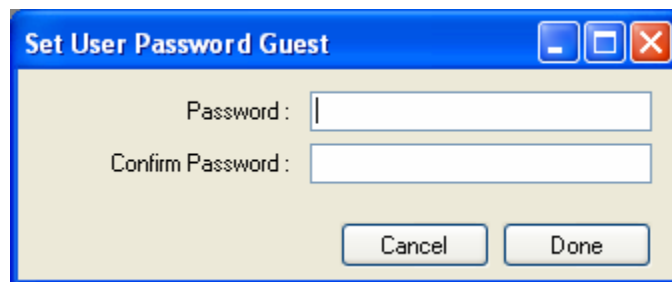
The User List window lists each user account that exists in the program. Users can be created, edited and removed.

To create a new user, select the **Create New User** option in the navigation bar on the form (or in the options side panel if enabled). This will bring up the **Create Security User** window.



The **Log In** name is the name set for each user and is used to log in to the program, just type the name you wish to use into the field provided. The second field called 'Full Name' is used to add this person to **User List**.

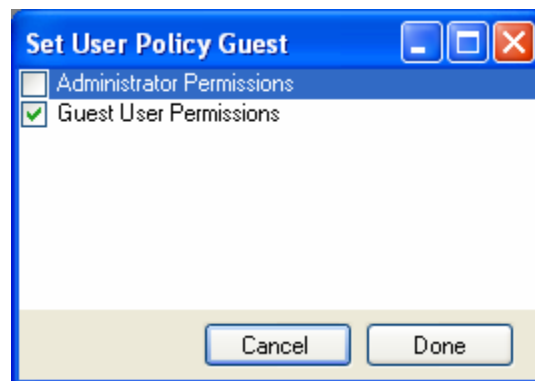
To set a password for the new user, select the **Set User Password** option in the navigation bar. This will call up the **Set User Password** window.



Passwords can be made up of numbers, letters and special characters and can be of any length. We suggest passwords be at least 6 characters in length to ensure that they are hard to guess. Click **Done** when complete. The new user will be now available for you to set access limits on.

Set User Policy

This the next step so select 'Set User Policy' from the **Create Security User** window.



In the **Set User Policy** window you will find the **Security User Roles** currently defined in your system. New Security User Roles can be created, edited or deleted at any time and are then available from this list to assign to each user account. This is explained on next page.

From the list, one or several Security User Roles, you setup, can be selected to apply to a particular user. Security User Roles are concurrent so you can setup several Security User Roles, controlling different areas, and assigning them in any combination (more than one) to specific user account.

Click **'Done'** after selecting the desired user policies.

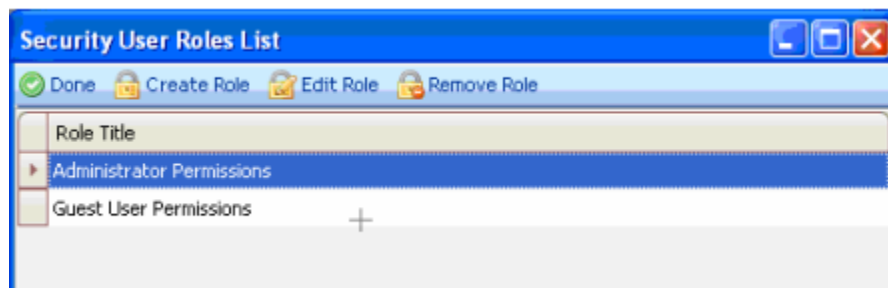
The user settings have now been defined. Click **'Done'** in the **Create Security User** window to apply these to the user.

To edit a user account, select a user from the **User List** window and then select the **Edit User** option from the navigation bar. Follow the same steps as outlined above to set the user log in, name, password and access policies.

To remove a user account, select a user from the **User List** window and then select the **Remove User** option from the navigation bar. Confirm the deletion in the following prompt to delete the user.

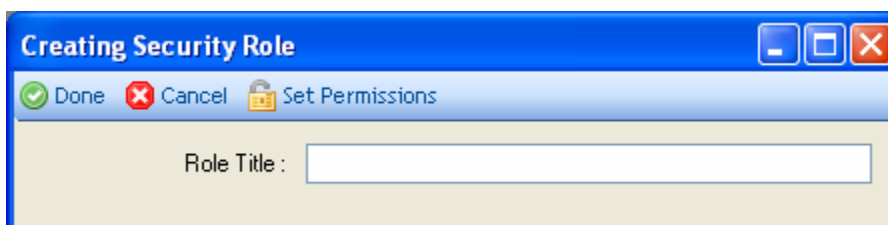
Creating/Editing/Removing Security User Roles

Security User Roles can be created and edited through the **User Roles List**. The User Roles List is accessed by selecting **User Roles List** from the drop down menu, this appears when you click on **System** in the Navigation Bar or from side option panel if open.

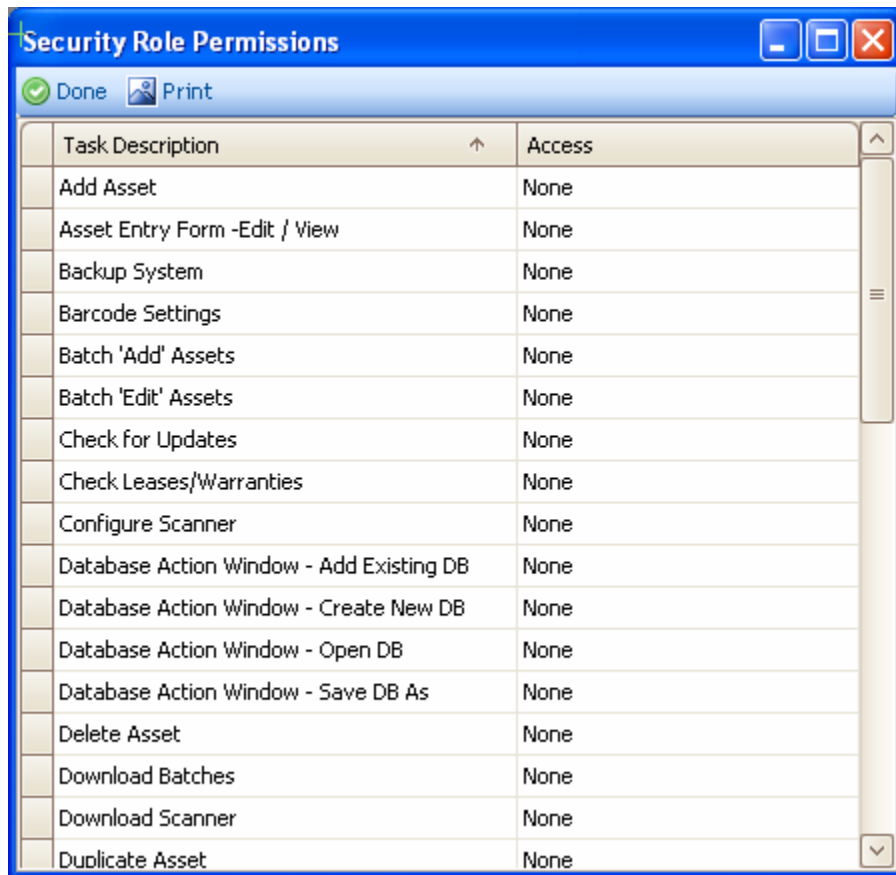


The User Roles List window lists the Security User Roles that exists with in your program. Security User Roles can be created, edited and removed.

To create a new security user role, select the **Create Role** option in the navigation bar (or in the options side panel if enabled). This will bring up the **Create Security Role** window.



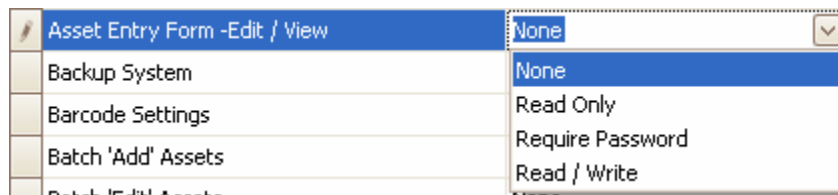
Give the new role a name and then select the **Set Permissions** option in the navigation bar. This will call up the **Security Role Permissions** window.



Task Description	Access
Add Asset	None
Asset Entry Form -Edit / View	None
Backup System	None
Barcode Settings	None
Batch 'Add' Assets	None
Batch 'Edit' Assets	None
Check for Updates	None
Check Leases/Warranties	None
Configure Scanner	None
Database Action Window - Add Existing DB	None
Database Action Window - Create New DB	None
Database Action Window - Open DB	None
Database Action Window - Save DB As	None
Delete Asset	None
Download Batches	None
Download Scanner	None
Duplicate Asset	None

Listed in the Security Role Permissions window are the ‘Tasks’ that you may wish to allow a certain type of user to have access to. See section below on ‘Tasks - Definition and what they permit one to do’ further along in this section of manual. This will help you decide who needs to be allowed access and why access might be denied.

Example of setting access for a task ‘Asset Entry Form’ follows. Setting access is done this way for all ‘Tasks’



Asset Entry Form -Edit / View	None
Backup System	None
Barcode Settings	Read Only
Batch 'Add' Assets	Require Password
Batch 'Edit' Assets	Read / Write

The Asset Entry Form – Edit / View task controls user’s ability to access and use the ‘Asset Entry Form’ window for editing/viewing purposes from the ‘Asset Grid’ and the ‘Actions’ menu.

Available Options:

- None - hides the menu item and disables the icon used to access this function from the ‘Actions’ menu’ and the ‘Asset Grid’ respectively.
- Read Only - allow the user to view the ‘Asset Entry Form’ window but does not allow the user to edit the asset information.
- Require Password – the user login and password is required before allowing the user to access the ‘Asset Entry Form’ window. The window will then act the same as the Read/Write option below.
- Read/Write – full access *User can change asset information

Once **all** tasks have access set, click **Done** to set the permissions for the new Security User Role you’ve named.

The Security User Roles settings will now have now been defined. Click **Done** in the **Create Security Role** window to create the new role.

To edit a Security User Role, select a role from the **Security User Roles List** window and then select the **Edit Role** option from the navigation bar. Follow the same steps as outlined above to change the role name and or task access options.

To remove a role, select a role from the **Security User Roles List** window and then select the **Remove Role** option from the navigation bar. Confirm the deletion in the following prompt to delete the role.

Task and Access Options

Tasks control specific areas or functions with in the program. Setting access options will control how a user (user account) interacts with the program and if they can change or access data. We have described each task in some detail because some ‘Tasks’ are different in operation than others and require careful selection of access options.

Tasks – Definition and what they permit one to do

Add Asset – Controls user’s ability to ‘add assets’ by inhibiting this action and locking part of ‘Actions’ menu dealing with adding assets.

Available Options:

- None - hides the menu item and icon used to access this function from the ‘Actions’ menu and prevents access from the ‘Asset Grid’.

- Read Only – No effect. Reverts to ‘None’ setting.
 - Require Password - the user login and password is required before allowing user to add an asset.
 - Read/Write - full access.
-
-

Asset Entry Form – Edit / View task controls user’s ability to access the ‘Asset Entry Form’ window for editing/viewing purposes from both ‘Asset Grid’ and the ‘Actions’ menu.

Available Options:

- None - hides the menu item and disables the icon used to access this function from the ‘Actions’ menu’ and the ‘Asset Grid’ respectively.
 - Read Only - allow the user to view the ‘Asset Entry Form’ window but does not allow the user to edit the asset information.
 - Require Password – the user login and password is required before allowing the user to access the ‘Asset Entry Form’ window. The window will then act the same as the Read/Write option below.
 - Read/Write – full access
-
-

Assets Grid - Controls user’s ability to access the ‘Assets Grid’ window.

Available Options:

- None - displays an error prompt if the user attempts to access the ‘Assets Grid’ option when starting the program or from the ‘Actions’ menu and icon bar menu. **Do not select this option as it is key component to program.**
 - Read Only - allows the user to view the ‘Asset Grid’ window but disables editing of the information contained within the grid.
 - Require Password - the user login and password is required before allowing user to access ‘Assets Grid’ window.
 - Read/Write - full access.
-
-

Backup System – Controls user’s ability to access the ‘Backup System’ window.

Available Options:

- None - hides the menu item used to access this function from the ‘System’ menu.
 - Read Only – No effect. Reverts to ‘None’ setting.
 - Require Password - the user login and password is required before allowing user to access ‘Backup System’ window.
 - Read/Write - full access.
-
-

Barcode Settings - Controls user's ability to access the 'Barcode Settings' window.

Available Options:

- None - hides the menu item used to access this function from the 'System' menu.
- Read Only -allows the user to view the 'Barcode Settings' window but disables editing of the information.
- Require Password - the user login and password is required before allowing user to access 'Barcode Settings' window.
- Read/Write - full access.

*In our opinion only the ADMINISTRATOR should have read/write access to this functionality.'

Batch 'Add' Assets - Controls user's ability to access the 'Batch Add Assets' window.

Available Options:

- None - hides the menu items used to access this function from the 'Scanner' menu and the 'Scanner' icon menu bar.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Batch Add Assets' window.
 - Read/Write - full access.
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Batch 'Edit' Assets - Controls user's ability to access the 'Batch Edit Assets' window.

Available Options:

- None - hides the menu items used to access this function from the 'Scanner' menu and the 'Scanner' icon menu bar.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Batch Edit Assets' window.
 - Read/Write - full access.
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Check for Updates - Controls user's ability to access the 'Check for Updates' window.

Available Options:

- None - hides the menu item used to access this function from the 'Help' menu.
- Read Only – No effect. Reverts to 'None' setting.
- Require Password - the user login and password is required before allowing user to access 'Check for Updates' window.
- Read/Write - full access.

Check Leases/Warranties – Controls user’s ability to access the ‘Leases/Warranties’ window.

Available Options:

- None - hides the menu item used to access this function from the ‘Tools’ menu.
 - Read Only – No effect. Reverts to ‘None’ setting.
 - Require Password - the user login and password is required before allowing user to access ‘Check Leases/Warranties’ window.
 - Read/Write - full access.
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Configure Scanner - Controls user’s ability to access the ‘Configure Scanner’ window.

Available Options:

- None - hides the menu item used to access this function from the ‘Scanner’ menu.
 - Read Only – No effect. Reverts to ‘None’ setting.
 - Require Password - the user login and password is required before allowing user to access ‘Configure Scanner’ window.
 - Read/Write - full access.
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Database Action Window – Add Existing DB - Controls user’s ability to access the ‘Add Existing DB’ option from the Database Action window.

Available Options:

- None - hides the menu item used to access this function from the ‘Database Action’ window.
 - Read Only – No effect. Reverts to ‘None’ setting.
 - Require Password - the user login and password is required before allowing user to access ‘Add Existing DB’ window.
 - Read/Write - full access.
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Database Action Window - Create New DB - Controls user’s ability to access the ‘Create New DB’ option from the Database Action Window.

Available Options:

- None - hides the menu item used to access this function from the ‘Database Action’ window.
- Read Only – No effect. Reverts to ‘None’ setting.
- Require Password - the user login and password is required before allowing user to access ‘Create New DB’ window.
- Read/Write - full access.

Database Action Window - Open DB - Controls user's ability to access the 'Open DB' option from the Database Action window.

Available Options:

- None - hides the menu item used to access this function from the 'Database Action' window.
- Read Only – No effect. Reverts to 'None' setting.
- Require Password - the user login and password is required before allowing user to access 'Open DB' option)
- Read/Write - full access.

Database Action Window - Save DB As - Controls user's ability to access the 'Save DB As' option from the Database Action Window.

Available Options:

- None - hides the menu item used to access this function from the 'Database Action' window.
- Read Only – No effect. Reverts to 'None' setting.
- Require Password - the user login and password is required before allowing user to access 'Save DB As' window.
- Read/Write - full access.

Delete Assets – Controls user's ability to 'Delete Assets' from the Asset Grid.

Available Options:

- None - hides associated icons to prevent user's attempts to access the Delete Assets functionality from the asset grid.
- Read Only – No effect. Reverts to 'None' setting.
- Require Password - the user login and password is required before allowing user to Delete Assets.
- Read/Write - full access.

Duplicate Asset - Controls user's ability to access the 'Duplicate Asset' window.

Available Options:

- None - hides the menu item and icon used to access this function from the 'Actions' menu and the 'Asset Grid' respectively.
- Read Only – No effect. Reverts to 'None' setting.

- Require Password - the user login and password is required before allowing user to duplicate an asset.
 - Read/Write - full access.
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Export Data - Controls user's ability to access the 'Export as csv file' window and the 'Export View' window.

Available Options:

- None - hide the menu items to access these function from the 'File' menu and the 'Views' menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Export as csv file' window or the 'Export View' window.
 - Read/Write - full access.
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Fields Selection - Controls user's ability to access the 'Fields Selection' window.

Available Options:

- None - hides the menu item used to access this function from the 'Customize' menu.
 - Read Only -allows the user to view the 'Fields Selection' window but disables editing of the information.
 - Require Password - the user login and password is required before allowing user to access 'Fields Selection' window.
 - Read/Write - full access.
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Forms Customization - Controls user's ability to access the 'Forms Customization' window.

Available Options:

- None - hides the menu item used to access this function from the 'Customize' menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Forms Customization' window.
 - Read/Write - full access.
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Generate Barcode Sequence - Controls user's ability to access the 'Generate Barcode Sequence' window.

Available Options:

- None - hides the menu item used to access this function from the 'Tools' menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Generate Barcode Sequence' window.
 - Read/Write - full access.
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Import Data - Controls user's ability to access the 'Import csv file' window.

Available Options:

- None - hides the menu item used to access this function from the 'File' menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Import csv file' window.
 - Read/Write - full access.
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License Information - Controls user's ability to access the 'License Information' window.

Available Options:

- None - hides the menu item used to access this function from the 'Systems' menu.
- Read Only -allows the user to view the 'License Information' but disables editing of the information
- Require Password - the user login and password is required before allowing user to access 'License Information' window.
- Read/Write - full access.

'In our opinion only the Administrator would require access to this'

Lookup Tables - Controls user's ability to access the 'Lookup Tables' window.

Available Options:

- None - hides the menu item used to access this function from the 'Customize' menu.
 - Read Only -allows the user to view the 'Lookup Tables' window but disables editing of the information.
 - Require Password - the user login and password is required before allowing user to access 'Lookup Tables' window.
 - Read/Write - full access.
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Manage Views - Controls user's ability to access the 'Manage Views' window.

Available Options:

- None - hides the menu item used to access this function from the 'Views' menu.
 - Read Only -allows the user to view the 'Manage Views' window but should display the error prompt if the user attempts to access the window functions.
 - Require Password - the user login and password is required before allowing user to access 'Manage Views' window.
 - Read/Write - full access.
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Open Template and Replace System Configuration Settings - Controls user's ability to access the 'Open Template and Replace System Configuration Settings' window.

Available Options:

- None - hides the menu item used to access this function from the 'System' menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Open Template and Replace System Configuration Settings' window.
 - Read/Write - full access.
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Print Asset - Controls user's ability to access the 'Print Asset' window.

Available Options:

- None - hides the menu item and icon used to access this function from the 'Actions' menu and the 'Asset Grid' respectively.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Print Asset' window.
 - Read/Write - full access.
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Print View - Controls user's ability to access the 'Print View' window.

Available Options:

- None - hides the menu item and icon used to access this function from the 'Actions' menu and the 'Asset Grid' respectively.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Print View' window.
 - Read/Write - full access.
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Quick Add - Controls user's ability to access the 'Quick Add' window.

Available Options:

- None - hides the menu item used to access this function from the 'Scanner' menu and icon bar menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Quick Add' window.
 - Read/Write - full access.
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Quick Find - Controls user's ability to access the 'Quick Find' window.

Available Options:

- None - hides the menu item used to access this function from the 'Scanner' menu and icon bar menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Quick Find' window.
 - Read/Write - full access.
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Restore Default Views - Controls user's ability to access the 'Restore Default Views' window.

Available Options:

- None - hides the menu item used to access this function from the 'Views' menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Restore Default Views' window.
 - Read/Write - full access.
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Restore from Backup - Controls user's ability to access the 'Restore from Backup' window.

Available Options:

- None - hides the menu item used to access this function from the 'System' menu.
- Read Only – No effect. Reverts to 'None' setting.
- Require Password - the user login and password is required before allowing user to access 'Restore from Backup' window.
- Read/Write - full access.

Save Current Views As - Controls user's ability to access the 'Save Current Views As' window.

Available Options:

- None - hides the menu item used to access this function from the 'Views' menu and Asset grid.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Save Current Views As' window.
 - Read/Write - full access.
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Save System Configuration Settings - Controls user's ability to access the 'Save System Configuration Settings' window.

Available Options:

- None - hides the menu item used to access this function from the 'System' menu.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'Save System Configuration Settings' window.
 - Read/Write - full access.
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User List - Controls user's ability to access the 'User List' window.

Available Options:

- None - hides the menu item used to access this function from the 'System' menu.
 - Read Only -allows the user to view the 'User List' window but should display the error prompt if the user attempts to access the window functions.
 - Require Password - the user login and password is required before allowing user to access 'User List' window.
 - Read/Write - full access.
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User Roles List - Controls user's ability to access the 'User Roles List' window.

Available Options:

- None - hides the menu item used to access this function from the 'System' menu.
 - Read Only -allows the user to view the 'User Roles List' window but should display the error prompt if the user attempts to access the window functions.
 - Require Password - the user login and password is required before allowing user to access 'User Roles List' window.
 - Read/Write - full access.
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View Batch Scan History - Controls user's ability to access the 'View Batch Scan History' window.

Available Options:

- None - hides the menu item used to access this function from the 'Scanner' menu.
 - Read Only -allows the user to view the 'View Batch Scan History' window but disables editing of the information.
 - Require Password - the user login and password is required before allowing user to access 'View Batch Scan History' window.
 - Read/Write - full access.
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View Batch Scan Records - Controls user's ability to access the 'View Batch Scan Records' window.

Available Options:

- None - hides the menu item used to access this function from the 'View Batch Scan History' window.
 - Read Only – No effect. Reverts to 'None' setting.
 - Require Password - the user login and password is required before allowing user to access 'View Batch Scan Records' window.
 - Read/Write - full access.
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