
Asset Track

Getting Started Guide

An Introduction to Asset Track

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Introducing **Asset** Track

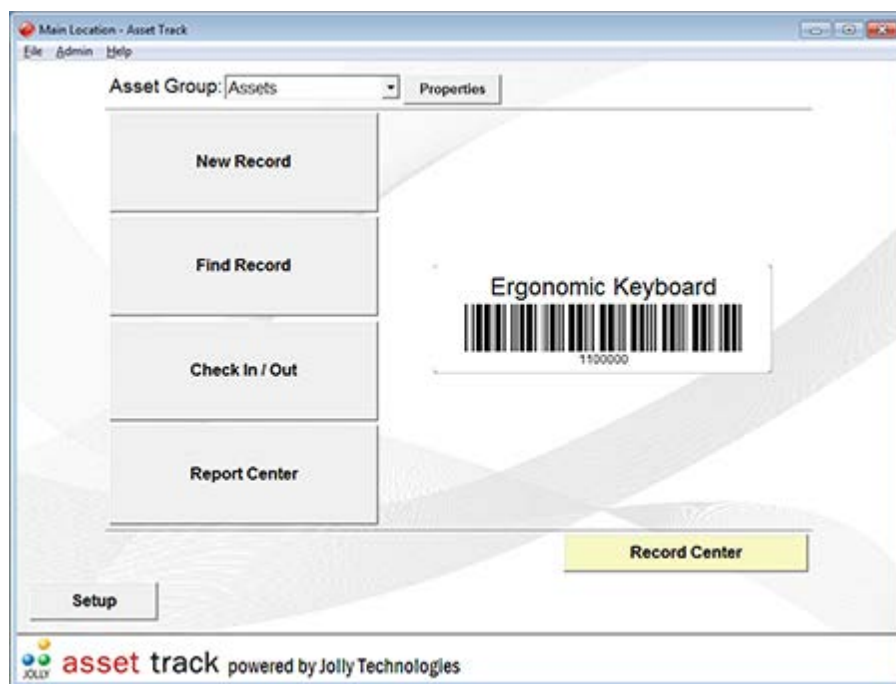
Asset Track is a software tool designed for recording assets (serial numbers, where they are, who is using them, where they were purchased, etc.) and tracking and enforcing access policy for people that check them out.

Asset Track is flexible: It may be tailored for any type of asset and facility. Included are preconfigured databases to accommodate assets, documents, equipment, tools, hardware, software and vehicles. It is also designed to be easily linked to users' existing data systems. The data fields and activity logs are user definable for any particular purpose.

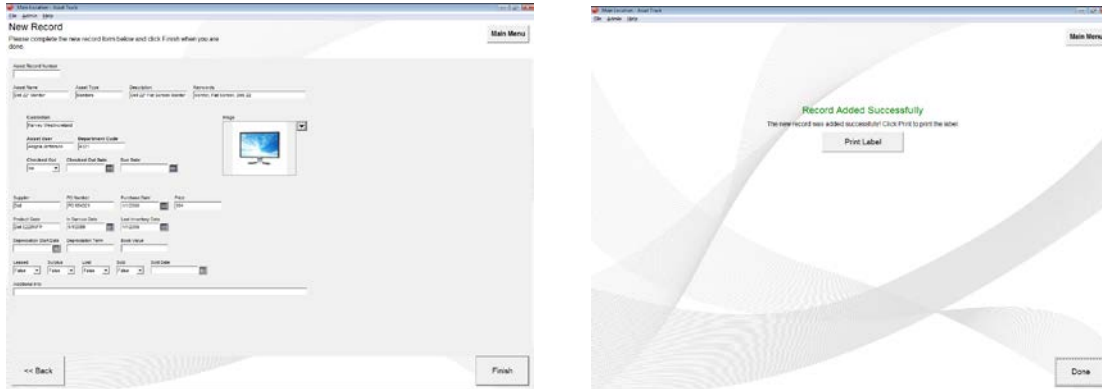
This guide provides a general overview of product components and instructions on getting started. This guide is a supplement to the Help system provided within the product. The integrated Help system provides comprehensive configuration details.

Overview

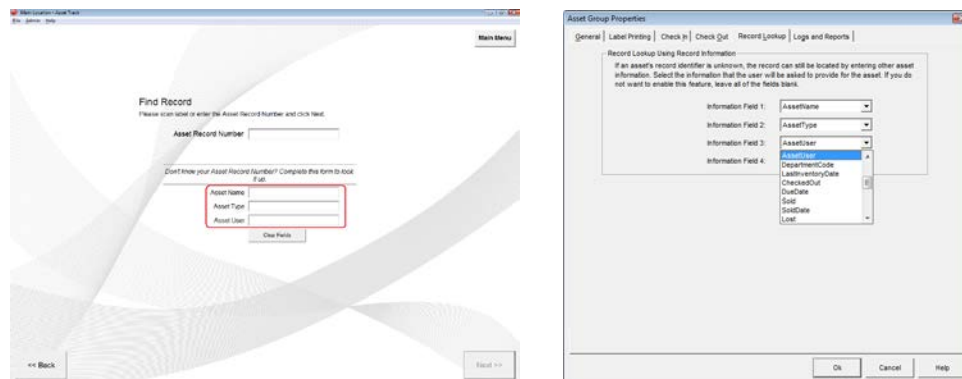
Asset Track is menu driven: It presents directed tasks that make the process easy. The *Main Menu* presents buttons that indentify the regular tasks. Asset Track is extremely customizable: Available tasks and data to be collected are easily definable.



Select *New Record*, enter the asset's information, then, (optionally) print the asset label. The label may be used to quickly recall the asset record and during the check out process.



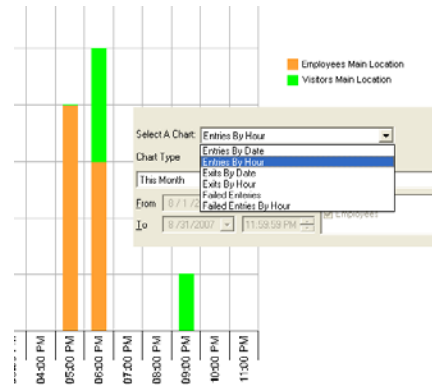
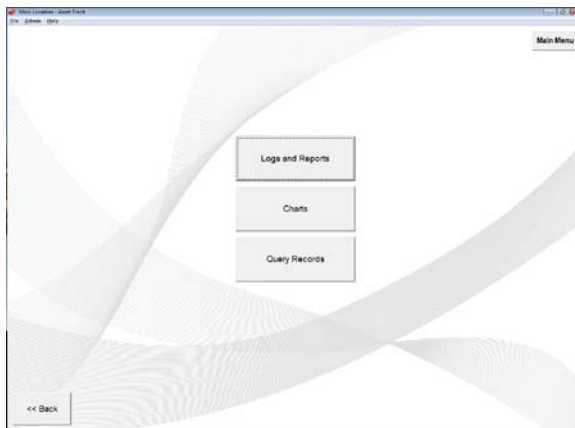
Define your lookup fields for record retrieval and check in/out policy:



The database, the fields in the database and record layout are customizable:

Field Name	Field Type	Field Size
IDNumber	Integer	0
FirstName	VarChar	50
LastName	VarChar	50
Representing	VarChar	255
PhoneNumber	VarChar	30
Email	VarChar	254
Purpose	VarChar	255
DateOfBirth	DBTimeStamp	0

Report Center provides details of all activities. Customizable logs, charts and reports are built-in:

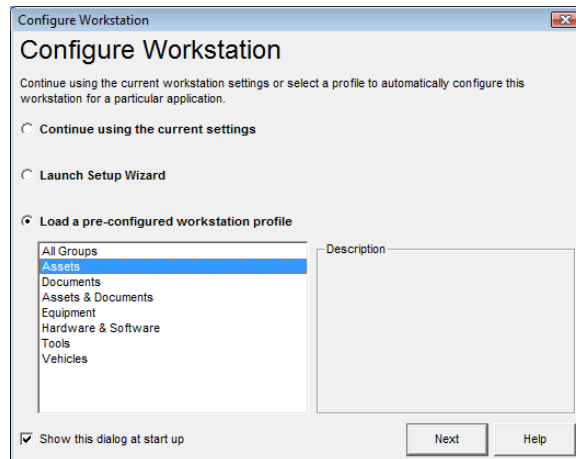


#	Log ID	Date	Asset Record Number	Asset Name	Group	Location	Action	Result	Operator	Asset Type	Asset User	Checked Out	Due Date
1	158	5/20/2009 1:45:41 PM	1100002	Dell 22" Monitor	Assets	Main Location	Add	Success	Administator	Monitors	Angela Jefferson	False	
2	157	5/19/2009 2:41:17 PM	1100000	Ergonomic Keyboard	Assets	Main Location	Print	Success	Administator	Peripherals	Mandy Jones	False	
3	156	5/19/2009 1:31:40 PM	1100000	Ergonomic Keyboard	Assets	Main Location	Check In	Failed	Administator	Peripherals	Mandy Jones	False	
4	155	5/19/2009 1:31:30 PM	1100000	Ergonomic Keyboard	Assets	Main Location	Check Out	Success	Administator	Peripherals	Mandy Jones	False	
5	154	5/19/2009 1:29:52 PM	1100001	Ergonomic Keyboard	Assets	Main Location	Delete	Success	Administator	Peripherals	Mandy Jones	False	
6	153	5/19/2009 1:29:47 PM	1100001	Ergonomic Keyboard	Assets	Main Location	Print	Success	Administator	Peripherals	Mandy Jones	False	
7	152	5/19/2009 1:29:27 PM	1100001	Ergonomic Keyboard	Assets	Main Location	Edit	Success	Administator	Peripherals	Mandy Jones	False	
8	151	5/19/2009 1:29:22 PM	1100001	Ergonomic Keyboard	Assets	Main Location	Add	Success	Administator	Peripherals	Mandy Jones	False	
9	150	5/19/2009 1:23:44 PM	1100000	Ergonomic Keyboard	Assets	Main Location	Print	Success	Administator	Peripherals	Mandy Jones	False	
10	142	5/18/2009 6:00:59 PM	1100000	Ergonomic Keyboard	Assets	Main Location	Edit	Success	Administator	Peripherals	Mandy Jones	False	

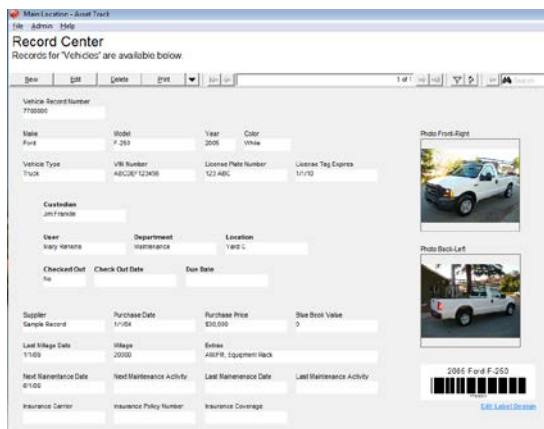
A Quick Start

Quick Start Option 1

Asset Track is preconfigured with *Workstation Profiles*. These profiles allow users to select an application that resembles their intended use. They include Assets, Documents, Equipment, Hardware, Software, Tools and Vehicles.



Behind each profile is an Asset Group(s) that contains its database, label design and settings.



Vehicles Asset Group



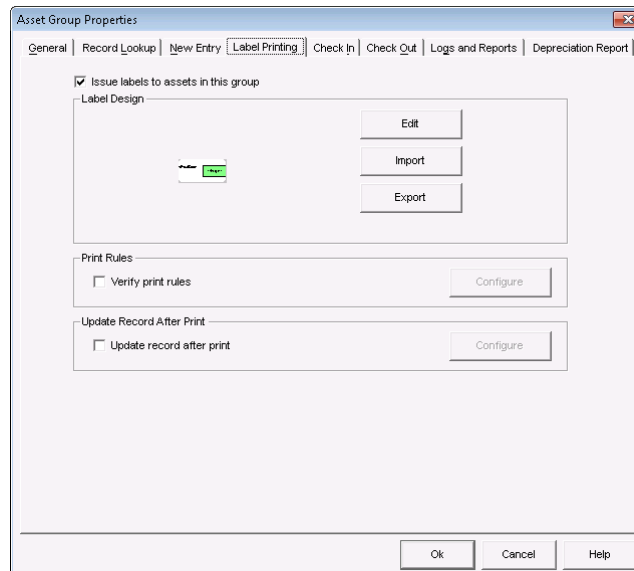
Documents Asset Group

Getting to Configuration

Configuration is done through the *Setup* button on the *Main Menu*. After clicking *Setup* you may choose to configure *Jolly Server Settings* or *Workstation Options and Devices*. The Record Center button takes you to the database view of all records. There is a shortcut link, “Properties” next to the selected Group drop-down box that will open the *Asset Group Properties* dialog.

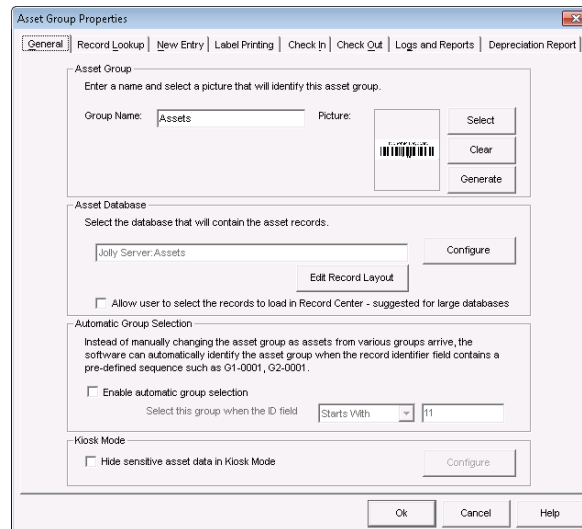
Changing the Label Design

Label design may be modified by selecting “*Edit*” next to the image on the *Label Printing* tab on the *Asset Group Properties* dialog. This will launch *Label Flow Designer*. See *more details about Label Flow at the end of this document*.

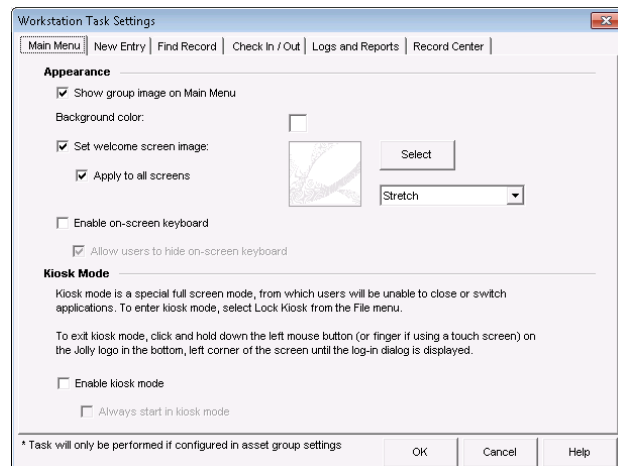
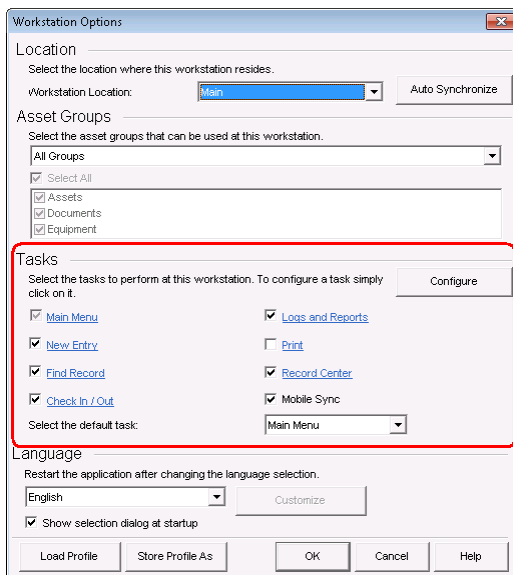


Quick Start Configuration

To globally define the lookup fields, check-in policy, check-out policy and report fields go to the *Asset Group Properties* dialog in *Jolly Server Settings*. Go through each tab to change configuration.

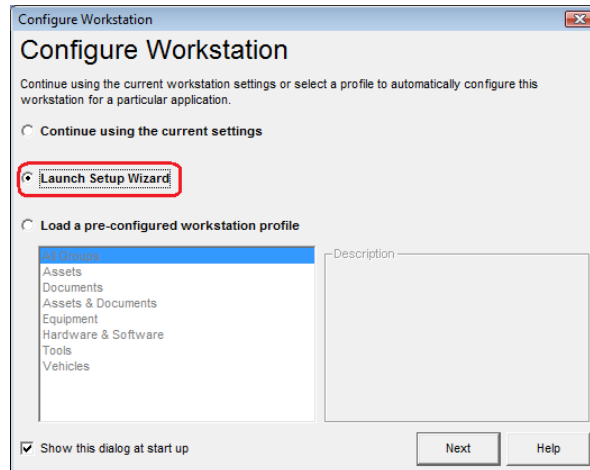


The tasks to be shown on the *Main Menu* screen, registration processes, check in/out settings and capture devices are set in the *Workstation Options and Devices*. Click on the blue hyperlink to configure the individual tasks or click the *Configure* button to configure them all at once. Also, configure the default task, e.g. what task is started when the software is started and after a task completes, by making a selection from the drop-down box.

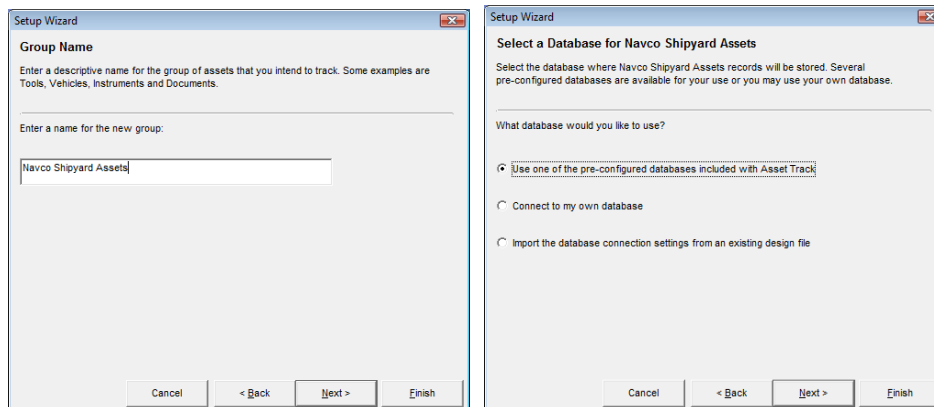


Quick Start Option 2

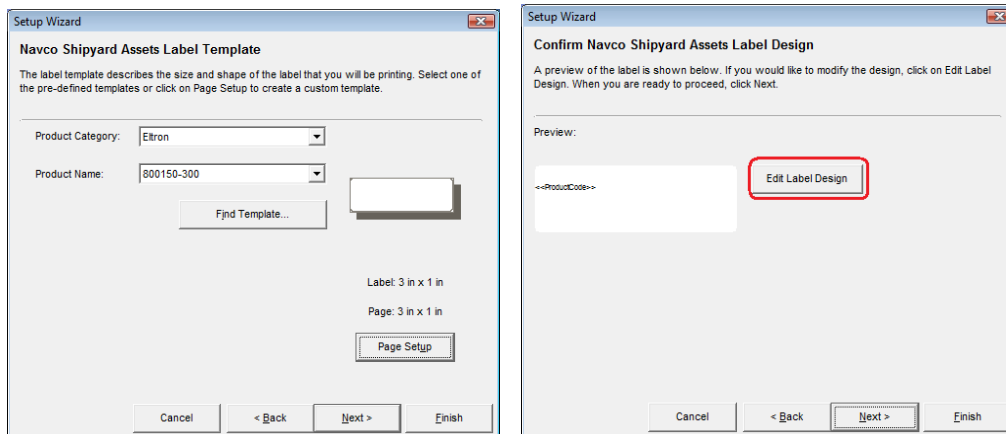
Select “*Launch Setup Wizard*” from the *Configure Workstation* dialog at start up or run from the *Setup* menu.



Name the Asset group; then choose the database:



Choose the label type; then design the label:



When the label design is complete; exit and save.

Go through each tab on the *Asset Group Properties* dialog and *Workstation Task Settings* dialog to configure – click *OK* when finished with each dialog.

Click *Finish* on the *Setup Complete* dialog and the initial set-up is done.

Go to *Jolly Server Settings* to add user groups, add users, add locations, and to network multiple copies.

Jolly Server Settings

Asset Track is designed to run across multiple locations in a networked environment. Shared settings such as asset groups and log data are stored on the Jolly Server while workstation specific options are configured in Workstation Options and Devices.

If Asset Track will be used in a standalone environment where it does not need to share data with other workstations, it can use the Internal Jolly Server, installed as part of Asset Track.

Installing Jolly Server

Jolly Server is installed separately from Asset Track. To install, run the Jolly Server installer that was provided to you when you purchased the software on the target server or workstation.

Connecting to a shared Jolly Server – Networking Multiple Copies

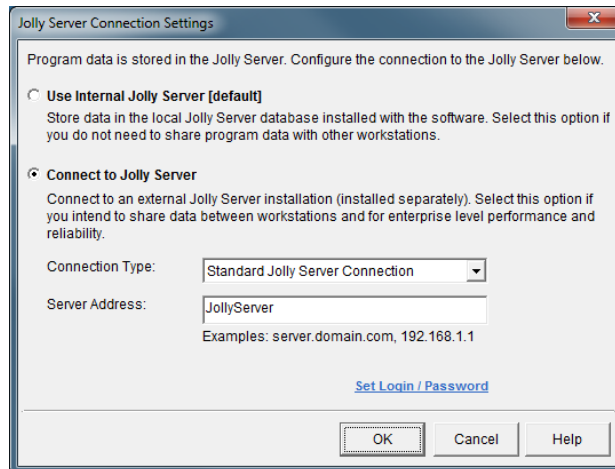
When networking multiple copies of Asset Track, install the Jolly Server on a central server or shared workstation. All networked copies should point to the same Jolly Server.

To connect to a *Jolly Server*, select *File > Connect to Jolly Server*.



By default, the *Internal Jolly Server* is selected. When Internal Jolly Server is selected, the software will operate in standalone mode.

To connect to a shared *Jolly Server*, click the *Configure* button.

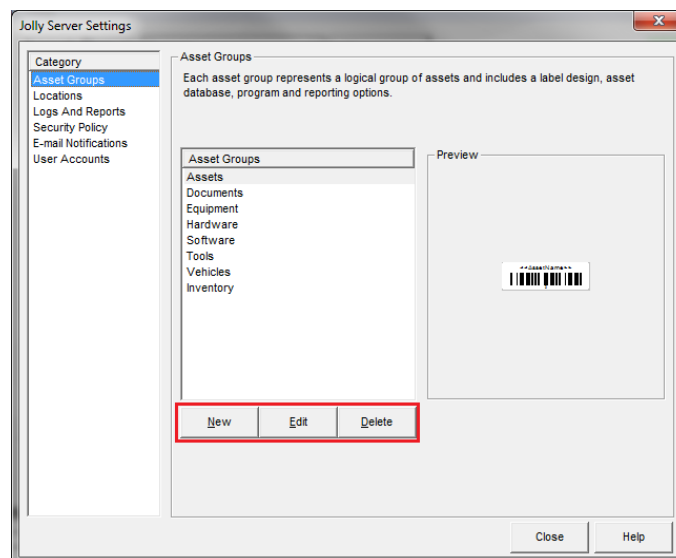


Enter the name of the server or workstation where Jolly Server was installed.

Asset Groups

Asset Track allows for using multiple groups of assets and multiple data sources simultaneously. This is ideal for asset groups with vastly different properties.

The Asset Groups is the active selection when the Jolly Server Settings is first opened. To add a new Asset group select *Add*, to edit an existing group select *Edit*. Either selection will open the Asset Groups Properties tab.

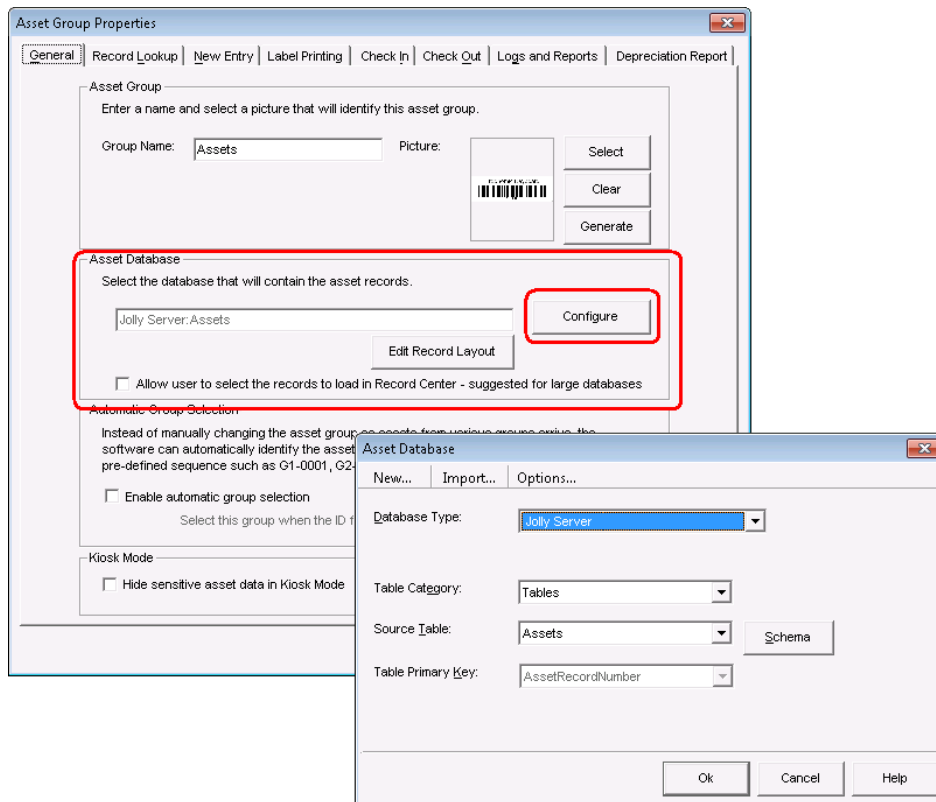


General Tab

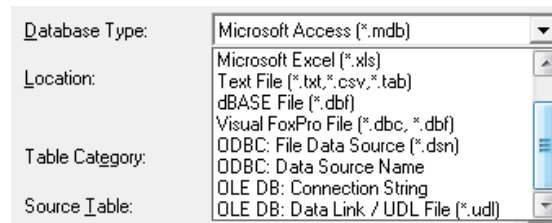
This tab contains critical information for the Asset Groups database. Give the group a name.

Asset Database

Asset Track is open-data source. It may utilize existing databases, a new database or one of the Jolly Server's sample tables. The Asset databases contain the Asset's information. Select the database in this dialog:



Included in the Jolly Server are tables that contain basics for Assets, Documents, Equipment, Vehicles, Tools Hardware and Software. For other existing databases, select database type for a selection of database types. Then point to the database source.



Important Note: Databases must contain certain fields for certain operations within Asset Track to function. Of utmost importance is a primary auto-number field or other unique field identifier. Check In and Check Out functions often require relevant database fields be selected during configuration.

Record Lookup Tab

The *Record Lookup* tab is used to define fields by which to lookup records. When no fields are mapped lookup is by record number only. To present additional lookup fields, select the appropriate database fields in the *Information Field* selection boxes. An option to require exact match of all fields or partial matching is configured by pressing the *Advanced Options* button.

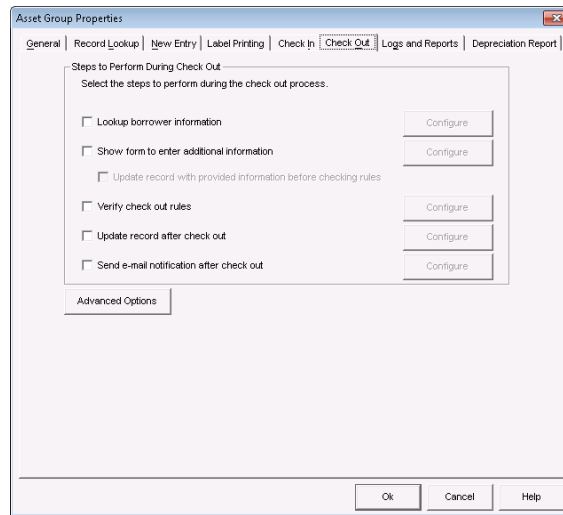
New Entry Tab

The *New Entry* tab is used to specify the default values when creating a new entry as well as checking for duplicate record entries. The ability to immediately print a new label after adding a new entry can be found by pressing the *Post New Entry Actions* button.

Check In and Check Out Tabs

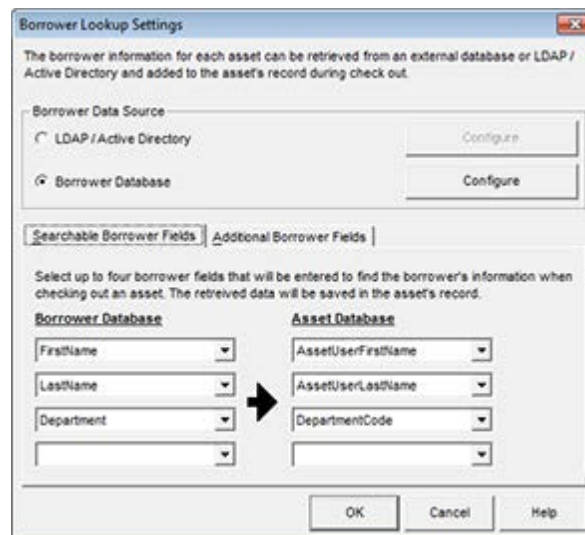
The *Check In* and *Check Out* tabs are used to define fields that are displayed, rules for an asset, messages displayed, automatic asset record updates, and e-mail notifications during the check in or out process.

For example, a database field may be set to “Currently In” after check-in and “Currently Out” after check-out. Alerts that display messages on the screen at check in/out when specific conditions are met are configured here.



Click the *Configure* buttons to configure each item's properties.

Use the *Lookup borrower information* option to use Asset Track like a library system, where a borrower is looked up from the organization's Active Directory or a borrower's ID card is scanned and then the items the borrower is checking out are scanned. Asset Track can interface with ID Flow, Asset Track or other ID card products:



Logs and Reports Tab

Data such as record number, date, time, location, user, action, result and comments are automatically logged whenever an action occurs in Asset Track. Users may define

additional fields from the database that may be logged as well. “Asset name” and “user” are the most obvious, though all may vary.

Align the log fields with the appropriate database fields.

Depreciation Report Tab

Optionally enable the depreciation report feature. To use this feature, you must identify asset database fields to be used in calculating the depreciation. Several types of depreciation are available.

Locations

To define locations, select the *Locations* category in the *Jolly Server Settings*. To add a new location select *Add...* and define the location. The locations are defined here. The location of a workstation is selected in *Workstation Options and Devices*.

Logs and Reports

The Logs and Reports category in the Jolly Server Settings is used to define how logs are cleaned up.

E-mail Notifications

E-mail Notifications is used to define the server and account from which e-mail notifications are sent. E-mail notifications may be sent when an Asset is checked in, out or when alerts are triggered. *E-mail Notifications* is a *Premier Edition* feature.

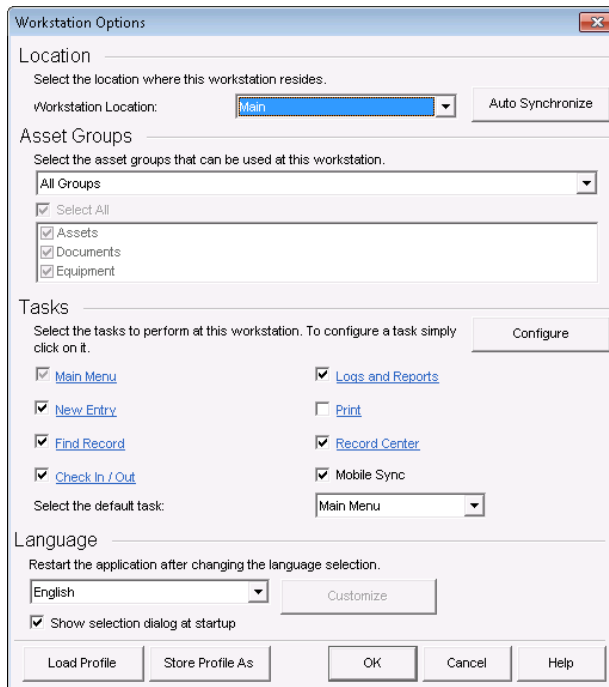
User Accounts

User Accounts define users allowed to use Asset Track. Asset Track user accounts can optionally be linked to Active Directory user accounts for single-sign on.

Users belong to a User Group. Four user groups are pre-defined: Administrators, Supervisors, Designers and Operators. Additional user groups may be defined.

Workstation Options and Devices

Workstation Options and Devices apply to the specific workstation. They include selecting the location, *Asset Groups* available at this location, selecting which tasks will be available to the user, configuring the tasks and printers, and selecting the language to be used at this location. Tasks are configured individually through the task's blue hyperlink or together via the *Configure* button.



Location

Select the location at which this workstation resides, such as Main Office. Locations can be configured in Jolly Server Settings.

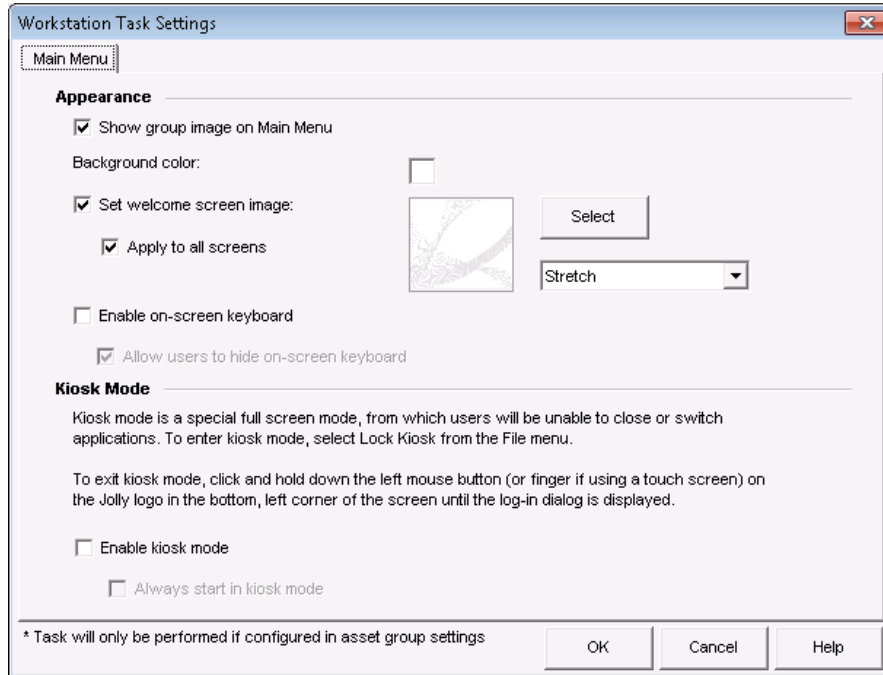
Tasks

Configure the tasks to be performed on this workstation. It is recommended that the user first select the tasks available on this workstation and then go through each of the active tasks to examine the configuration options.

Main Menu

Any of the Asset Track tasks may be set as the default screen that the program will return to when a task is completed. For frequent swiped check-outs make the default the *Check in* screen. The *Main Menu* may be accessed from any task by selecting the

Main Menu button. By default Asset Track shows the group image for the current Asset group in the *Main Menu*. That may be disabled here. A custom background image may also be imported here.



Kiosk Mode

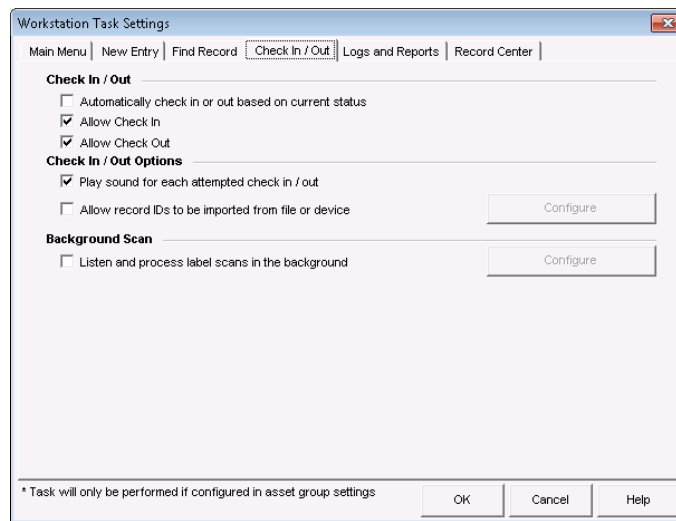
Asset Track may be run in an unattended *Kiosk Mode*. Examples of such use are a check-in/out only station or a new asset entry station. When run in *Kiosk Mode*, the user is unable to change applications or get to other areas of the computer and network: Asset Track is locked to the screen.

New Entry

The new entry task provides a way to add new assets to your database.

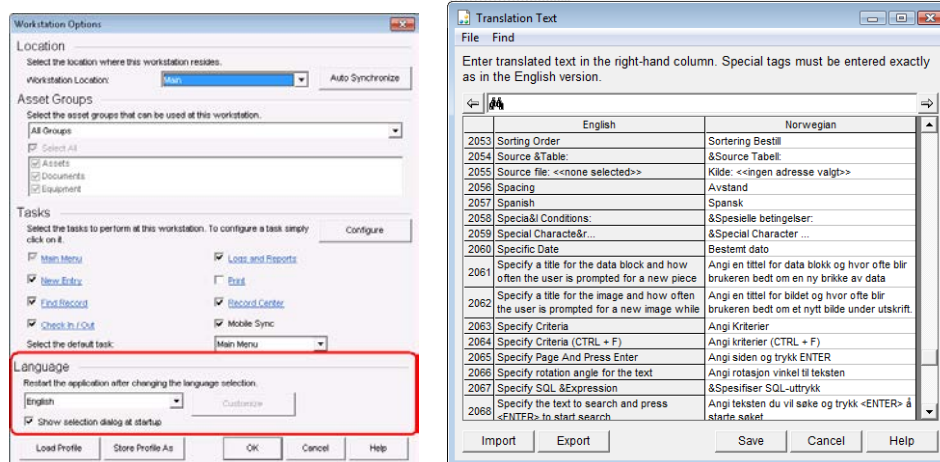
Check In / Out

Providing a check in and/or out screen, like all tasks, is optional. For organizations that Asset Track may be set to automatically check an item in or out based on the Asset's current status: If it are checked in it will check them out and visa versa.



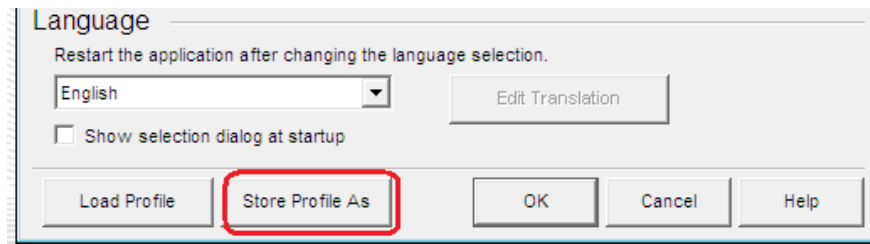
Language

Asset Track is available in 10+ languages. A translation table allows the user to make changes to the translation or to translate into a language not yet provided by Jolly. After changing languages, restart the program.



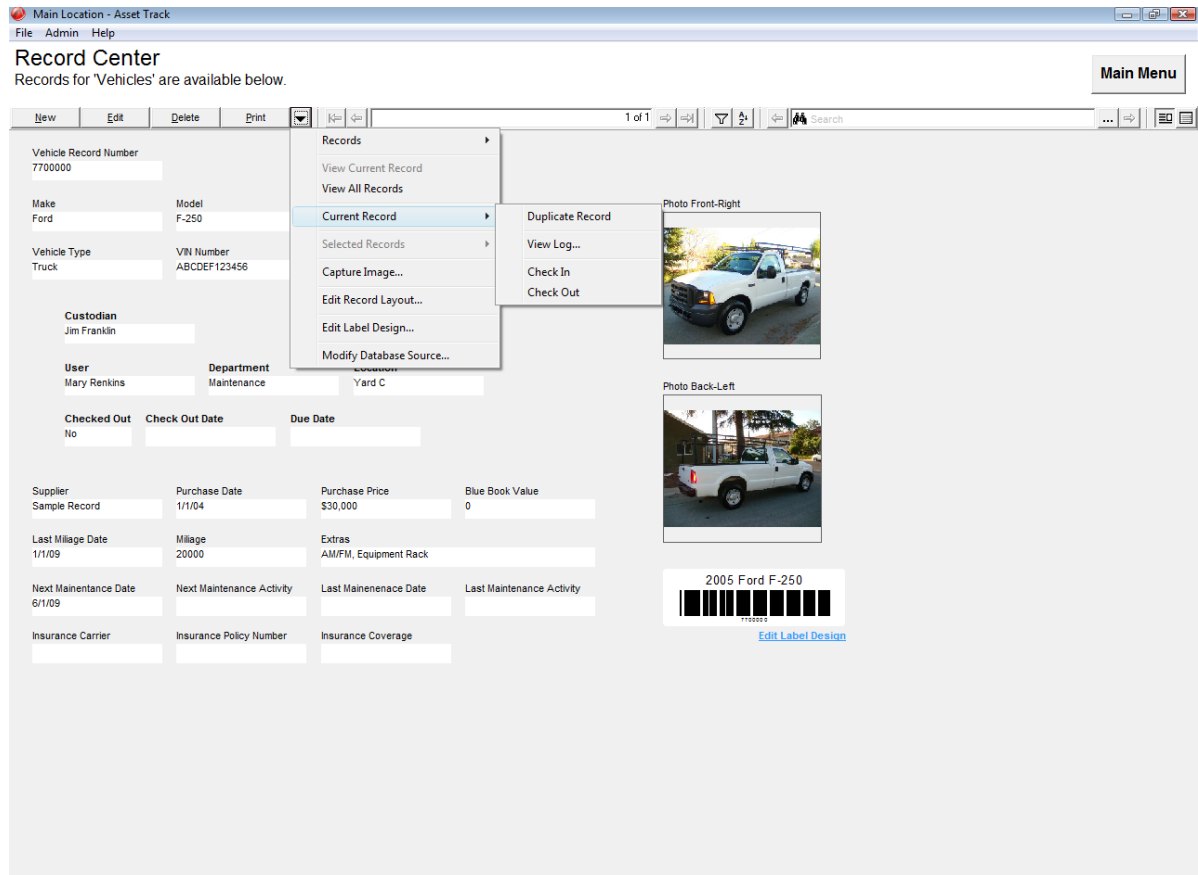
Workstation Profiles / Saving Workstation Options and Devices

Once the workstation is configured, the settings may be saved as a workstation profile. Profiles are used to quickly deploy the same configuration across multiple workstations. However, profiles may vary across a system: For example, there may be Front Desk, a Self-registration Kiosk and Check-out Station profiles all used together.



Asset Track Record Center

Record Center is used for the management of records. Records may be added, edited, deleted, printed and duplicated from this screen. The down-arrow button provides additional options.

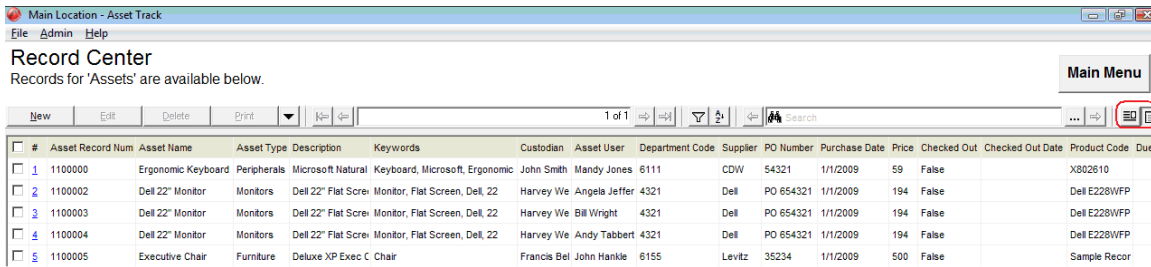


The screenshot shows the 'Record Center' interface for 'Vehicles'. The record details are as follows:

Vehicle Record Number	7700000		
Make	Model		
Ford	F-250		
Vehicle Type	VIN Number		
Truck	ABCDEF123456		
Custodian	Jim Franklin		
User	Department	Yard C	
Mary Renkins	Maintenance		
Checked Out	Check Out Date	Due Date	
No			
Supplier	Purchase Date	Purchase Price	Blue Book Value
Sample Record	1/1/04	\$30,000	0
Last Mileage Date	Milage	Extras	
1/1/09	20000	AM/FM, Equipment Rack	
Next Maintenance Date	Next Maintenance Activity	Last Maintenance Date	Last Maintenance Activity
6/1/09			
Insurance Carrier	Insurance Policy Number	Insurance Coverage	

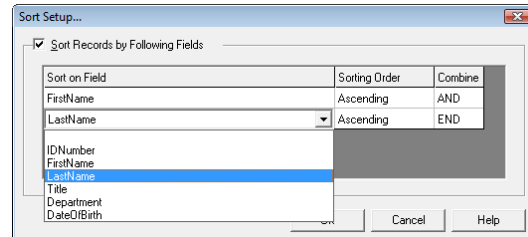
The context menu is open, showing options: Records, View Current Record, View All Records, Current Record (selected), Duplicate Record, Selected Records, View Log..., Capture Image..., Check In, Edit Record Layout..., Check Out, Edit Label Design..., and Modify Database Source... There are also photo thumbnails for 'Photo Front-Right' and 'Photo Back-Left', and a barcode for '2005 Ford F-250' with an 'Edit Label Design' link.

Records may be viewed in single-record or spreadsheet view by selecting the buttons on the right of the toolbar.



Records may be batch printed, deleted and edited by checking the box to the left of the record and selecting the appropriate action. Records may be sorted by clicking on column headers.

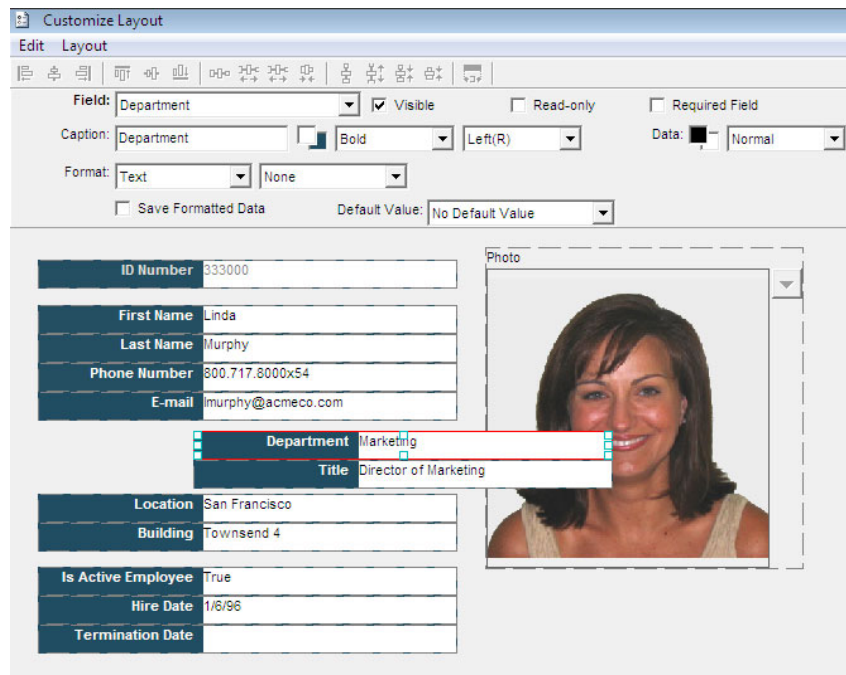
The toolbar contains *filter* and *sort* buttons  . Filters are used to create data subsets. Sorting allows for multiple field sort criteria.



Configuring the Record Screen

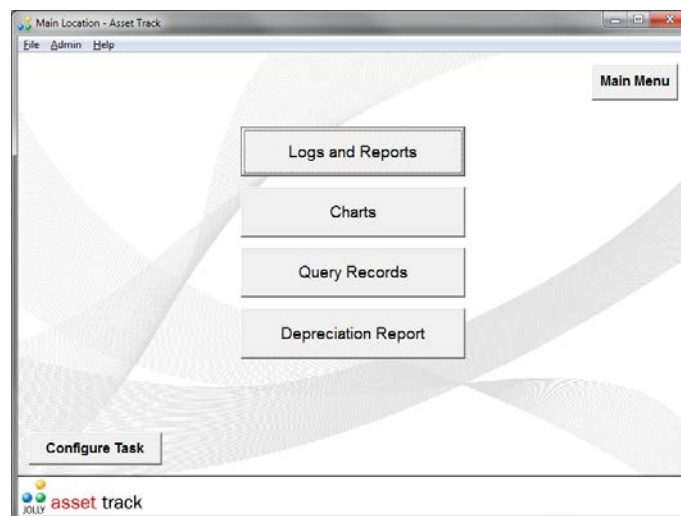
Asset Track has drag-and-drop record screen formatting. Select *Edit Record Layout* from the down-arrow menu on the *Record Screen*: Size and move fields with the mouse. Caption placement, colors, alignment tools and other formatting options are provided on the menu bar.

Formatting options vary by edition. In the *Premier Edition* fields may be made *Visible*, *Required* and *Read Only*. They may be given default values. Drop-down lists may be created. Text can be set to Capitalize, UPPER CASE or lower case. Image paths may be created to store variable images to file.



Report Center

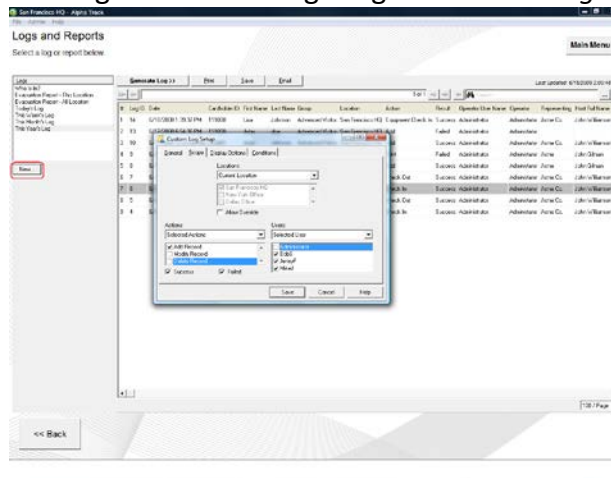
There are four types of reports built into *Report Center*:



Visibility of these features is set in the Logs and Reports area of the *Workstation Options and Devices*.

Logs and Reports

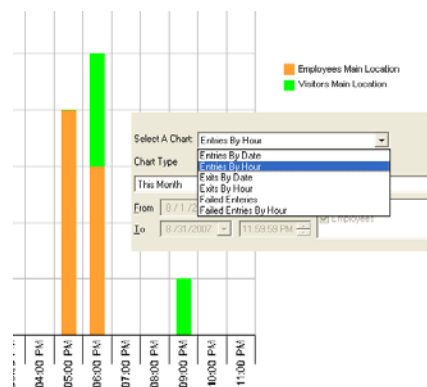
Asset Track contains seven built-in reports. Custom reports can be added (*in the Premier Edition*) by selecting *New* and configuring the *Custom Log Setup*.



Reports may be printed, saved to a file or e-mailed.

Charts

Charts give a graphical representation of the volume of check in/out activity on what hours, days, and months.



Query Records

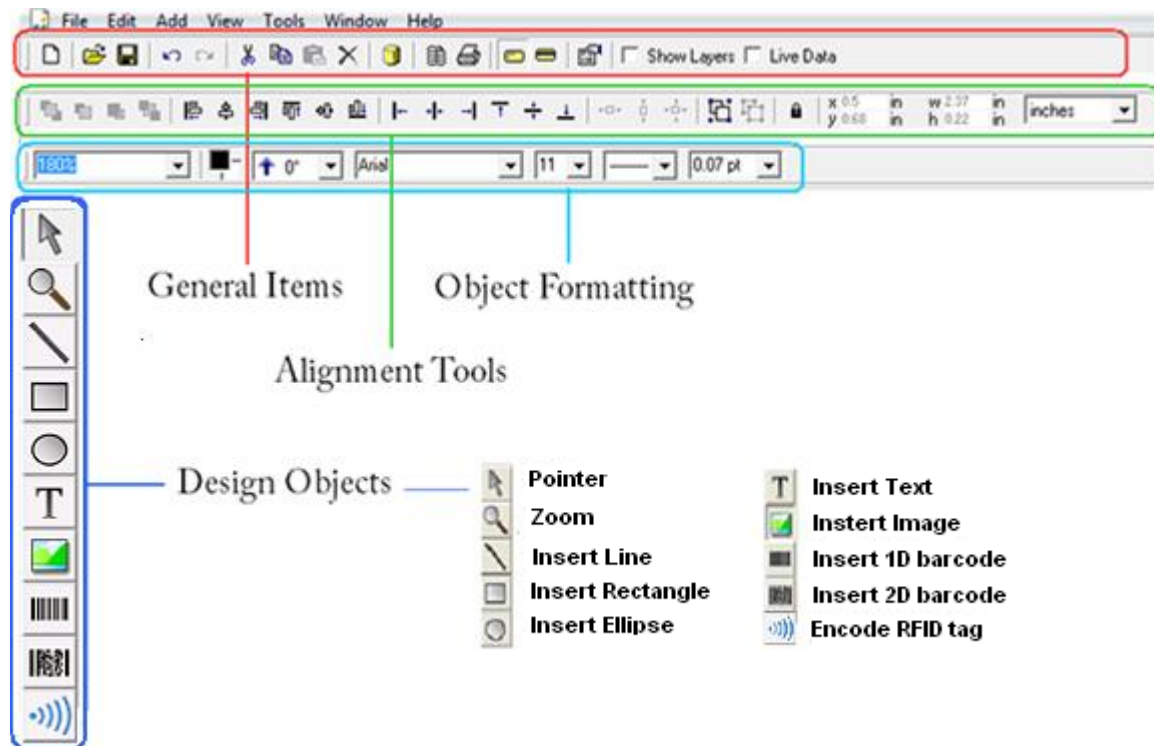
Queries are used to pull all or a subset of records from the database. They are commonly used to export records. They may be named and saved for re-use. Queries designed in *Query Records* may be invoked in Record Center using the Filter Records function.

Label Flow Label Designer

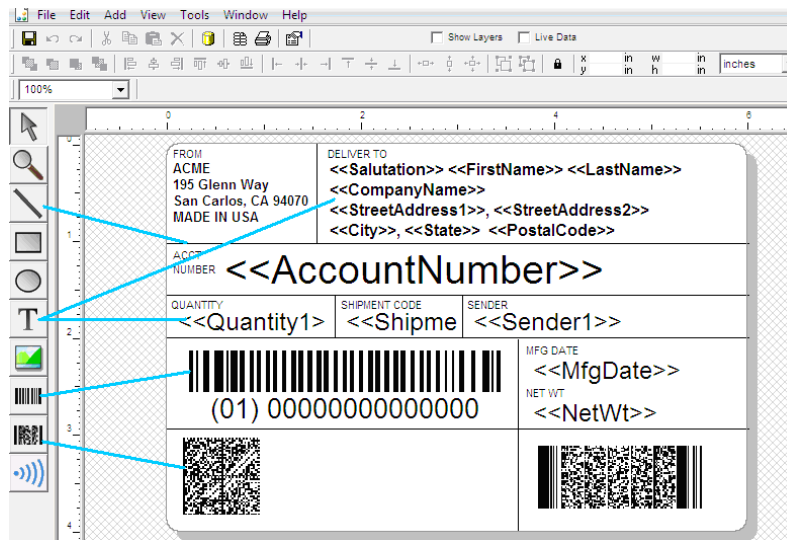
Asset Track contains an integrated version of Jolly Technologies leading label product: Label Flow for the design of sophisticated labels.

Design Screen

The design screen contains four toolbars: general items, alignment tools, design objects and object formatting.



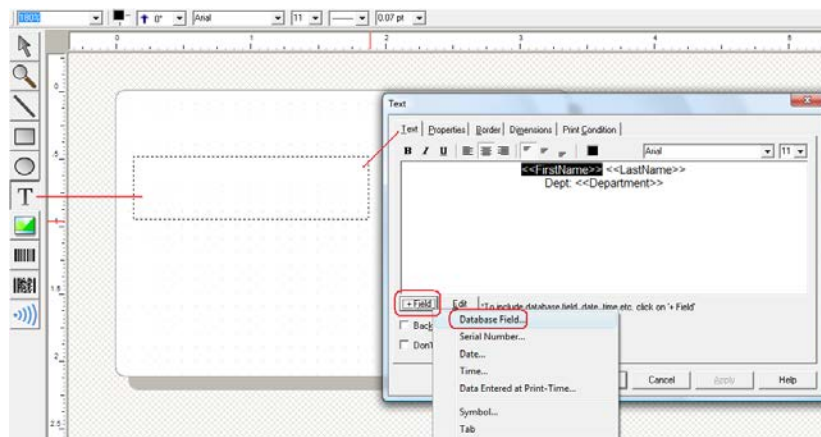
Labels are designed by selecting the design object on the left-hand toolbar and by drawing that object's area on the card with the mouse. After the area drawn the object's *Properties* dialog will appear. Click through the tabs to format the object.



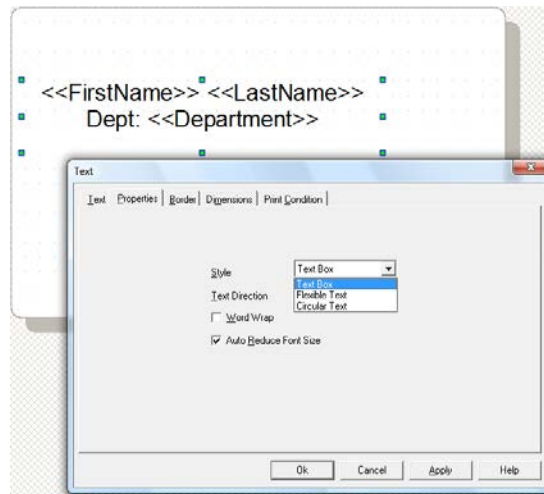
Objects may be resized at any time and *Properties* dialog re-accessed by double-click.

Working with Text

Label Flow contains rich text editing. Regular text, database text, serial number, date and time may be combined within one text box. Type with a keyboard or use the *+ Field* button for text selections.



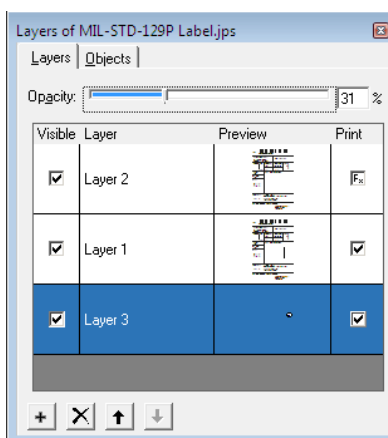
There are three types of text formatting: Text Box, Flexible Text and Circular Text. *Text Box* will always place text within the bounds of the box drawn in the design: If larger, it will auto-reduce in font size or word wrap. *Flexible Text* will maintain font size regardless of the size of the box drawn. *Circular Text* formats text in a circle.



Working with Layers

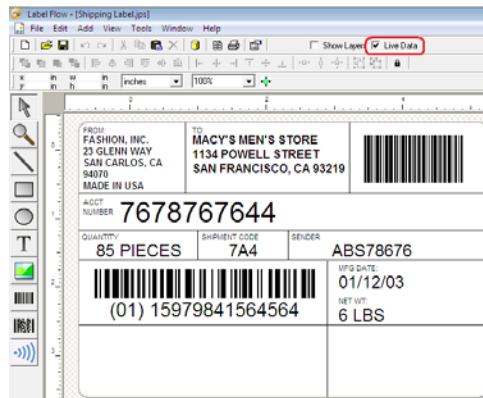
Like other quality graphical design tools, Label Flow uses a layered design approach. Layers may contain different design objects of varying opacity.

To see the layers window click the *Show Layers* checkbox on the top menu bar. Layers are added using the [+] button at the bottom of the window. Use the arrow buttons to move layers above and below other layers. Click the *Print* checkbox on each layer to format its print condition. The active design layer is highlighted blue.



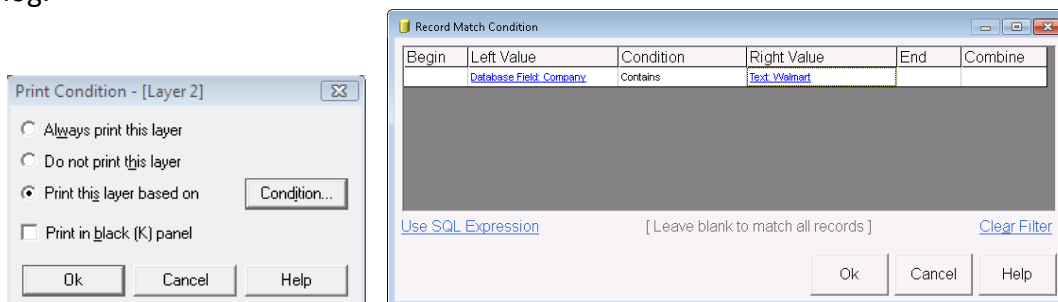
Viewing Designs with Live Data

At anytime the card design may be viewed with data by checking the *Live Data* button on the top menu bar:



Working with Print Conditions

Design objects or design layers may be set to print only if specific database conditions are met. Print conditions are set on the *Print Conditions* tab of the object's properties dialog.



Saving a File

Use *File -> Save* or *Save as...* to save and name the design. Select *Exit* from the File menu to return to Asset Track.

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