



Thank you for your interest in IDM's ATSS software solution. This is a working demo which allows you the ability to setup and enter live information as you review the capabilities of the software. After 15 uses of the ATSS Demo it will stop working. At that time you can contact your supplier with any additional questions.

Data Flow

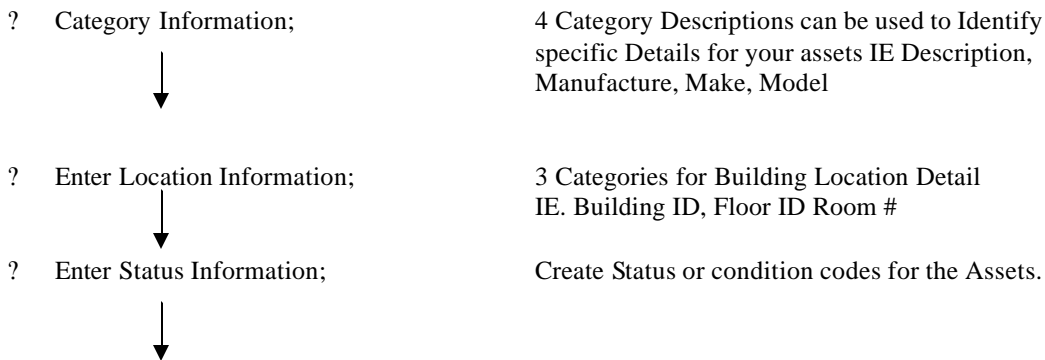
Begin by entering your basic company information in the Administration setup.

Administration Setup

Setup the company information, User Security, Portable Data Terminals ID's and Barcode Printing of Asset Labels.

Once the System Setup is finished, Setting Up the various Asset Description and Location Tables need to be created before adding Assets to the software.

File Maintenance



Once you have completed building your Asset information, you can begin adding Assets to the database through the Asset Table Maintenance Screen or the Import button on the main screen. You can either manually enter or use a Portable Data Terminal to collect and download the Asset detail to ATSS.

Adding Assets – Manually

- | | |
|---------------|--|
| ? Add Asset | Click Add Button or the + sign. A row will appear. Highlight the cell and begin selecting from the drop down menu. Post the Asset |
| ? Asset Table | Go to Main, Asset to load Asset Maintenance Table, Go to the Asset Identification that meets the same description as the Asset you want to Add. Click the + sign or Add Button, Enter a Asset Number of Click OK and a number will be generated. |
| ? Move Assets | Click on Move Assets button, Click on the + sign or Add Button. Enter the information and the Asset ID # and Post. |

All activity concerning the Asset transactions can be viewed in the Asset Table Maintenance screen. Asset Item History and Detail are viewed in that screen.

Quick Start

Installation:

Run setup.exe from file downloaded off the Internet. This will begin the setup and installation of ATSS software. Once you have successfully installed ATSS, you will be able to use the program with its existing data of Assets, Categories and Tables. If you want to enter some other data you may. This is a working demo. There are 2 main areas that we encourage data entry.

Under File Maintenance:

1. Category Table setup
2. Location Table Setup
3. Status Table Setup

Under Asset:

1. Add Asset
2. Move Asset

First begin by opening ATSS by either the icon on your desktop or through your start menu.

Click on Main on the menu bar, then File Maintenance. Under File Maintenance there is Category Tables, Location Tables and Status Tables. These are the areas that you setup how you are going to describe your Asset and setup the physical buildings that you will be identifying. Once these tables are setup you can move right into Adding Assets either manually or using the Portable Data Terminal that comes with the Purchased ATSS Package.

Using either the Add Asset button or going to the Asset Table Maintenance thru the Main Menu options. You can start identifying and placing Asset ID numbers to your Assets.

After entering your information you can begin moving or placing the asset at the various locations within your facility. Again this process can be done manually or by using the Portable Data terminal (Recommended). Using the Move Assets button you would Add/Assign a location to a specific Asset ID # then Post the Asset.

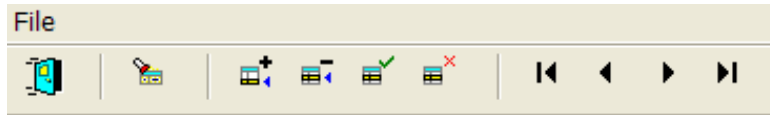
All transaction activity is viewed in the Menu Bar, Main, Asset. This displays the Asset Table Maintenance screen with an Asset Tab and a History Tab used for presenting the asset activity. Go to the Asset Description that you want to view activity; a list of Asset Detail will be displayed. Highlight the Asset ID # and Click on the History Tab. The asset detail and history will be displayed.

The **TYPE** identifier codes are as follows:

A = Added Asset
M= Moved Asset
P= Physical Inventory Scan
I= Imported Asset from a file

The other fields reflect your Category and Location table names that were setup before any activity occurred. Dates, Times and other comments are listed with the transaction activity.

System Menu Bar –



Closes the current Screen being viewed



Search Button for current screen displayed. If the Screen is the Purchasing, you would search POs



Add Button—Adds a record into the database



Delete Button—Deletes a record from the database



Save Button—Saves the record to the database



Delete Button—Deletes the record from the database



First Record Button - Takes you to the first record



Previous Record Button - Takes you back one record.



Next Record Button - Takes you forward one record.



Last Record Button—Take you to the last record in the database.

Menu Bar

File- Printer Setup, Change Password, Exit

Main - Access to the main body of the ATSS system starts from the Main button on the menu bar.

Reporting- Access to all ITSS Report generation Options

Administration - Setup of user information, Numbering defaults, Data Collection files and barcode printing information.

Administration

Company Maintenance

System Setup allows for entry of company information and setting up PDT IDs, Asset Numbers and Asset Tag Sizes.

System Security – Add User ID numbers and specify what information areas they are allowed to view and change.

Database Clean up

Pack Database – This re-index's the database files for faster look ups
Archive and Purge – Allows for specific storage and file deletion

Main

File Maintenance

Category Tables, Location tables and Status Tables

Build your Category Tables, Location tables and Status Table.

Category Tables

These are 4 user defined tables that you can name.

Enter the names for all 4 or only use 2.

Once you name the Category you will need to add the specific detail for that category.

Press the View Button. This is where you add a number of descriptions for assets based on that category.

Location Tables

These are 3 user defined tables that you setup.

The process is the same as above.

Status Tables

This table allows you to define various status conditions to your Assets.

Process same as above.

Establishing as much information in the setup of the tables is important. These tables are loaded onto the Portable Data Terminal for easy data collection anywhere in the building.

ATSS does not allow for entry of information relating to the Categories, Locations and Status tables. This is done at the Computer.

Asset

Asset brings up the details for all assets added to the ATSS system. This area allows you to view specific details concerning asset activity.

Activity processing

This activates the same screen entry as the buttons on the main screen.

Add Assets

Move Assets

Physical

Reporting

Asset Reporting, Activity Reporting and Barcode Printing

Use this area to create reports on each level of activity from Adding, Moving and Physical inventory.

Generate your Asset Labels.

Bar Code Labels

Depending on how you setup the numbering of Assets in the System Setup under Administration, ATSS can be setup to auto increment your asset numbers (**Recommended**) or you can enter your own asset numbers.

These Asset Tags are attached to the Asset. You can then manually enter the Asset Detail or use the Portable Data Terminal to enter the Item Detail.

Network Setup

Part 1 – Setup Workstations

After the ATSS software is installed on the Server, we need to setup the Workstations that will be used for data access and various manual processes. There is an InstallWS Folder will be on the server that allows you to install on other computers on your network.

Please make sure that your network Administrator has disabled any security that restricts Application setup routines.

From each workstation:

1. Map folder **ATSS** as a drive letter from the Workstation PC. Be sure to **check on** prompt to reconnect folder at login.
2. From the **Start Bar** choose RUN -> X:\Install\SETUP.EXE. Where X is the mapped drive letter from step 2 above. **Note: all workstations must be mapped to the same drive letter.**
3. Follow the onscreen instructions. The default prompt settings should be sufficient. Note: setup will create a folder **ATSS** on the local drive.
4. Once complete an icon will be created on the workstations desktop. Right-click the icon to display a menu. Left-click menu option **Properties**. In the **Shortcut** tab change the **Target** to X:\ATSS\ATSS.exe, change the **Start in** to X:\ATSS, where X is the mapped drive letter from step 2 above.
5. After the Icon Target and EXE folders have been set. Click on the ATSS Icon.
6. From the Main menu select Administration, System Setup.
7. The first screen contains company address information at the bottom you have 2 Tabs, Address Info and System Info.
8. Select System Info, this screen sets the direction of where the data is located on the network.
9. Change **Main Folder** to X:\ATSS\, where X is the mapped drive.
10. Change **Database Folder** to X:\ATSS\, where X is the mapped drive.
11. Change **User Folder** to \MY DOCUMENTS\

Keep PDT Defaults and Bar Code Defaults as installed for now.

PDT to PC Connection Setup

Install Microsoft Active Sync and establish a partnership with the Portable Data Terminal (PDT).



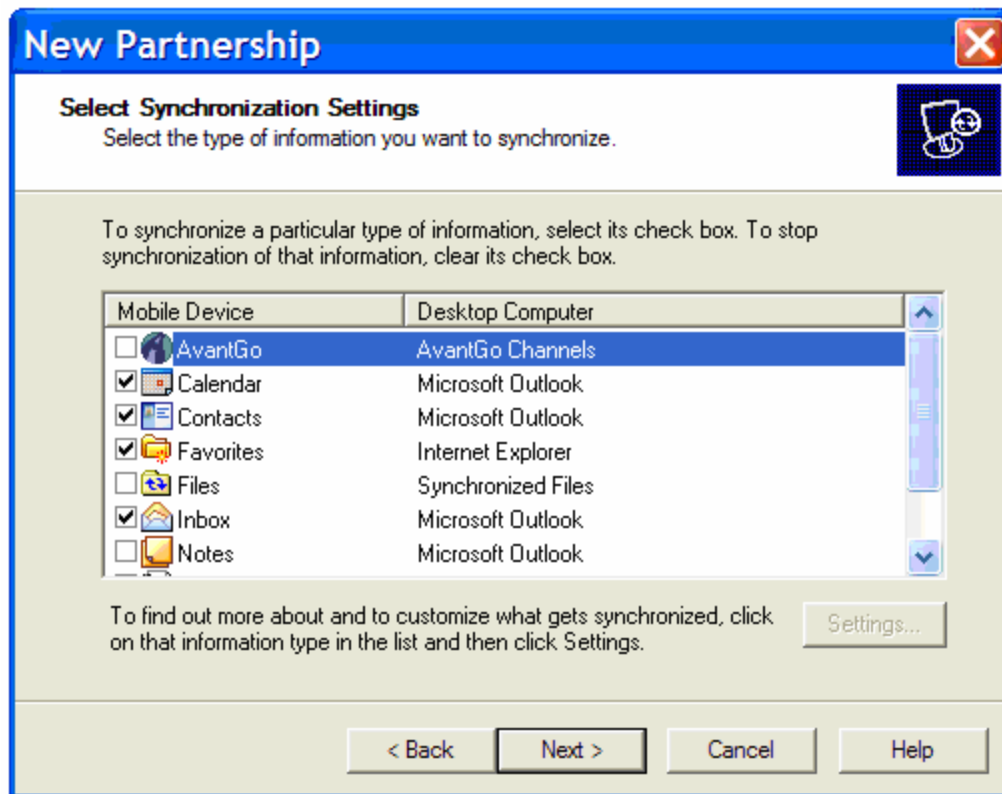
1. Connect PDT to PC for Active Sync Session using either cable or Bluetooth.
2. Once the connection is made Active Sync asks to establish a Standard Partnership. Click Next



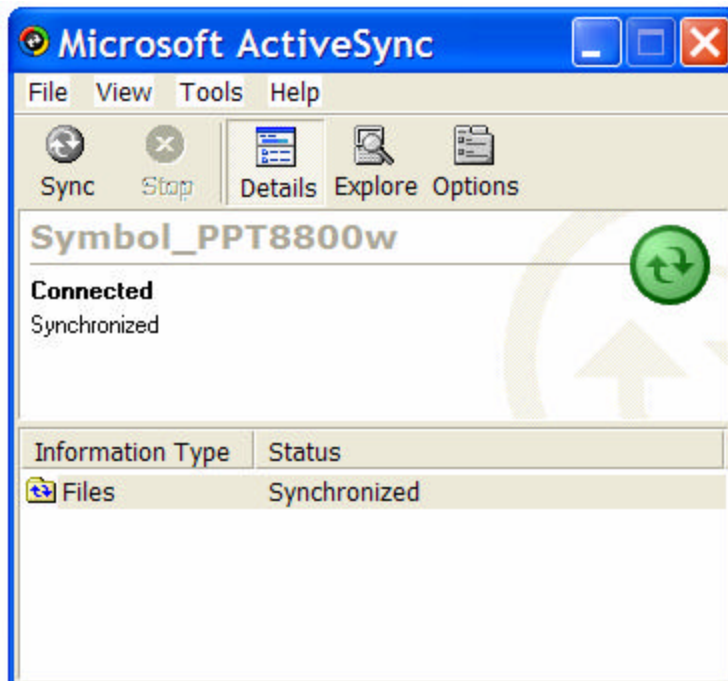
3. Select Synchronize with this Desktop. Click Next



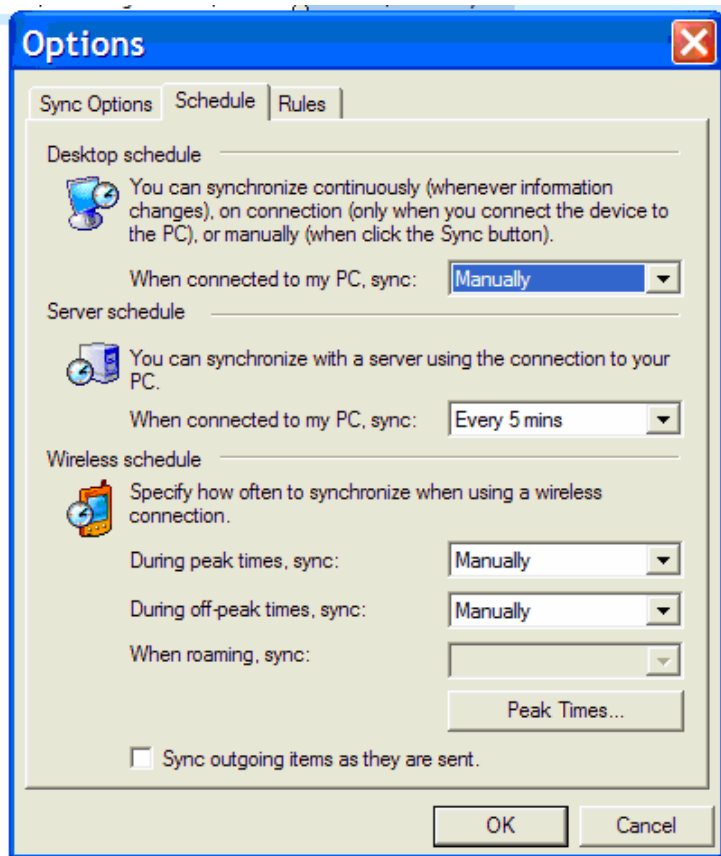
4. Select Synchronization Settings. Uncheck everything and Place a Check Mark on the FILES Selection



5. Click Next
6. A window telling you Setup is complete. Click Finish
7. Active Sync will Look for changes and update files



8. From this window we need to setup the Options, Click Tools
9. Options, Schedule



10. Desktop Schedule needs to be set to Manual. Click OK

The last step is to verify that the Folder Address created by Active Synch is in the ATSS Administrative Setup.


The Partnership has created a folder on your desk which is needed for moving data between the PC and the PDT. Go to the folder which will use the partnership name before My Documents. Open that folder. Example: **Pocket_PC My Documents**. When you open the folder the name of the folder will be in the address bar. Example: **Address Bar - C:\Documents and Settings\Ted Flick\My Documents\Pocket_PC My Documents**

The complete address will need to be copied into the ATSS Application as follows:

Start ATSS on the PC

Go to Administration Menu, System Setup, Company Maintenance, System Info Tab, PDT ID's Button.

PDT IDs' Button - Loads a screen that asks for a PDT ID and a Synchronization Folder, click the Add Record Plus

sign  which will add a line for the information to be added.

Enter the PDT ID, Tab to the Synchronization Folder and enter the exact address bar information with a forward slash \ at the end. You can highlight the address bar information and do a Copy/Paste into the Synchronization Folder area. The **\ forward slash must be at the end.**

Click the Close Button to exit the screen.

If you are going to begin entering Category, Location and Status information into ATSS, once this information is in then you are ready to Active Synch and move that information onto the PDT.

If the Category, Location and Status tables have been entered into ATSS before the Connection setup you will need to open and close all the tables through the File Maintenance area in the Main Menu, then establish an Active Synch connection and move the information onto the PDT.

When the Active Synch is established you will see a Yellow Circle that indicates that file need to be synchronized with the PDT.

Click the Synch Button and the files will be moved to the PDT.

You are now ready to start using the PDT Applications.

PDT Applications

ATSS provides 3 applications for the portable data collection terminal, Add Assets , Move Assets, and Physical Assets. The Applications are started from an ATSS Main Menu which handles all data applications

ATSS - Main Menu

User ID – Input the User ID

Add Button – This button starts the Add Asset application.

Move Button – Starts the Move Asset application

Physical Button – Starts the Physical Asset application.

Import Button – Activates the importing of the Category, Location, Status, and Security tables that are updated from the PC.

Export Button – This prepares the collected data information for transmission to the PC and ATSS database processing.

Exit Button – Exit the application

After the Categories, Locations, and Status tables have been defined, and Active Synch connectivity has been established PDT has a menu Option called Import.

Import –

Import Button – This Option needs to be performed when you first use the ATSS application. This application loads all the Category, Location and Status information entered on the PC into the application on the PDT. **Going forward it will be used only if you have added/deleted information in any of the Category, Location and Status fields on the PC. This keeps your data tables current.**

When the **Import Button** is activated, you are asked if you want to **Import Control Tables**. Tap YES.

You will then be Tapping OK as each Category Table appears.

Continue until the screen indicates **IMPORT Complete**. Press OK

You have imported your tables and are returned to **ATSS - Main Menu**

Add Asset

Add Button

Based on the Four Category tags that you used, when the **Add Button** is pressed you will have a screen with the Category tags and Drop Down fields with the Names for that Category to choose from.

Also you have a **More, Repeat,** and **Location** Button.

The **More** Button brings up a screen that allows you to Scan/Enter a Serial# and enter a Value to the Asset, as well as a comment field.

The **Location** Button allows you to define the current asset location.

The **Save** Button saves the current Asset information.

The **Repeat** Button saves all asset information with that Asset ID#, clears just the Asset ID# but keeps all other fields the same. If the next Asset is in the same location but the Asset is different then you can change the information on the Asset and Enter/Scan the Asset ID# without having to re enter the location information.

The **Add** Button clears all fields for entry of a new Asset. **The Add button clears the Location, Serial and value information.**

Entering an Asset

Tap Add Button

Enter Asset Information

Scan/Enter Asset ID#

If Asset is in a Location

Tap Location
Enter Location Information

If Asset needs to have a value or serial # recorded

Tap More Button
Scan/Enter Serial #
Enter Value

When Complete: **Tap Save Button**

If you have another Asset that is the Same Description and Location, **Tap the Repeat Button**

If the value is different you will have to **Tap the More Button and change the value.**

Once Complete Tap the Save Button

If the Location is the same but the Asset is different **Tap the Repeat Button** and change the Asset information, Scan/Enter the Asset ID# and **Tap Save or Tap Repeat.**

If everything is changing, the Asset, Location, then **Tap the Add Button.** This clears all fields. Enter your information and **Tap Save Button.**

Move Asset

The Move asset application is for tracking the movement of Assets within your organization. The operation is straight forward. If you move an Asset out of one area you need to identify the new Location then Scan/Enter the Asset ID#.

Move Button – Brings up the screen were the information about the location needs to be entered. The screen has **Save, More, Add, Exit** Button Options.

After you enter the Location detail you will Scan/enter Asset ID#. If you scan, the transaction is saved and the ID # field is blank for the next ID # to be entered. If you key enter the ID # you then will need to tap the Save Button which will perform the same task as above.

Save - Saves Information and Clears the ID # for next entry

More – This takes you to a Comments screen for any Comments that need to be attached to that Asset or Move.

Add – This clears all fields from the screen for next Location entry.

Note: You can change the location detail after each Scan/Enter or Manual Enter Save process. Those changes will be recorded.

Physical

The Physical asset application is for taking a Physical inventory of Asset in each specific location. The operation is to identify the Location and Scan/Enter the Asset ID#. Then compare the information with the database on the server.

Physical Button – Brings up the screen were the information about the location needs to be entered. The screen has **Save, More, Add, Exit** Button Options.

After you enter the Location detail you will Scan/enter Asset ID#. If you scan, the transaction is saved and the ID # field is blank for the next ID # to be entered. If you key enter the ID # you then will need to Tap the Save Button which will perform the same task as above.

Save - Saves Information and Clears the ID # for next entry

More – This takes you to a Comments screen for any Comments that need to be attached to that Asset or Move.

Add – This clears all fields from the screen for next Location entry.

Note: You can change the location detail after each Scan/Enter or Manual Enter Save process. Those changes will be recorded.

Export Data from PDT

The exporting of the collected information is similar to the Import process. We have three applications and we will be exporting three files via the Active Synch connection to the PC for processing.

Export Button – This prepares the collected data information for transmission to the PC and ATSS database processing.

When the export Button is Tapped, a screen will appear asking if you want to export the activity tables. Press Yes. You will then press OK for each table to be prepared for exporting to the PC.

When complete, connect the PDT to the PC and begin the Active Synch connection. You should see that 3 files are not synchronized. Click the Synchronize Button and the screen will indicate all files synchronized.

You can now go to the ATSS program and import the files through the Add Asset, Move Asset and Physical Buttons. Each button will allow for the importing, viewing and Posting of the information from the portable data terminal.

These processes can also be performed from the Main Menu Option called Activity Processing.

If you have any questions or need assistance with our software products please call.
856-866-9001 in New Jersey or 800-891-1927 outside of NJ.