

## Characteristics & Standard Features

**Container TRACKER**<sup>®</sup> has a unique set of characteristics that are a result of the product vision under which it was developed. These characteristics are the primary design goals for **Container TRACKER**<sup>®</sup> implemented by the features and user interface. These characteristics have evolved over **Container TRACKER**<sup>®</sup>'s life as the result of customer input and a clearer understanding of a wide range of asset management challenges. As **Container TRACKER**<sup>®</sup> continues to evolve we will strive to improve the fundamental characteristics in every area of the product.

**Container TRACKER**<sup>®</sup> also has a complete set of features. There are two types of features, Standard and Optional. The Standard features are built in to every version of **Container TRACKER**<sup>®</sup>. They are available in every system regardless of its nature. Often the owner can disable these features, but they only have to be re-enabled to be available. Optional features are purchased in addition to the basic system. Optional features do not apply to every tracking and asset management system. Often they represent a complete system of additional functionality that is associated with but not central to cyclic asset management.

### Characteristics

*Ease to Use* – The processes are graphic, patterned, data driven and data aware. Text entry is only required for user-defined functions. There is no need for operators to navigate a maze of screens and menus. All the tools they need to move items, check inventories, and correct improper entries are accessed from the 'Main Screen'. Although the 'Main Screen' has a series of menus, these are used exclusively for configuration (often restricted from operators). All movement of items proceeds from left to right across the 'Main Screen'. As selections are made, the data presented is relevant to the series of selections. This allows the operator to move items in a manner that is logically consistent and administratively appropriate.

*Graphic Interface* – Makes operator responses simple and easy. Movement is recorded with only four mouse clicks and a quantity entry. Just two mouse clicks determines the 'Inventory' for any item at any location. Colors and user-configured icons visually identify items and system levels or statuses.

*Protects Data Integrity* – Movement rules are automatically enforced. This virtually eliminates administrative losses by blocking movements of items to locations where they don't belong. Operator selections are made from lists or 'trees'. Data is screened when entered and selected when used. This eliminates most data entry errors.

*Easy to Automate* – **Container TRACKER**<sup>®</sup> provides for external system automation through a Standard Automation Interface to accept transactions from virtually any external source that can export the required data. **Container TRACKER**<sup>®</sup> also automates inventory level monitoring with 'Alarms', communication locally and with the entire network through 'Triggers', 'Email Generation' and 'Messages'. It also automatically looks for and loads external transaction data, remote transaction data and remote trigger data. The appropriate use of these automation methods is like having an extra manager that works 24 hours a day, seven days a week.

*Easy to Integrate* – Designed from its initial conception as 'middleware'. **Container TRACKER**<sup>®</sup> was built to easily integrate with external hardware and software systems. It provides location/status and item aliases to reduce or eliminate translation software. Defines and provides (optionally) a standard interface to allow integration with existing software systems, barcode, RFID, GPS and specialty hardware systems.

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*Information Rich* – User-selected inventory, transaction, alarm and exception report types, allow multiple category selection to generate specific, unique reports. These provide the precise, information needed to accurately manage all your cyclic assets (containers, pallets, tanks, computers, trucks, etc.). ‘Between’ reporting allows you to identify all transactions between two specific locations. This information immediately identifies performance and ‘system leaks’. Even small systems can generate millions of unique transaction reports by simple characteristic selections. The most complex report criteria needs only 10 mouse clicks; simple selections are three clicks or less. With Custom Reports (optional) you can save the report selection criteria to standardize report information.

*Flexible and Powerful* – Designed to accommodate all common methods of tracking your cyclic assets. **ContainerTRACKER®** can be configured with combinations of features to solve the most complicated tracking situations while retaining ease of use. Hierarchal inventory structures provide truly sophisticated control of your cyclic assets.

*Scalable* – Easily evolves from a basic local system to a super complex multi-location solution. **ContainerTRACKER®** truly provides ‘A solution you can’t outgrow.’ Provides superior tracking and management solutions from a single computer with minimal technical sophistication to fully integrated LAN, WAN web systems.

*Affordable* – Purchase only the features you need. As your needs change or become more complex, additional features and solutions are easily added.

*Full-Featured* – Provides the most comprehensive set of features available for cyclic asset tracking. Method specific features are optional. You buy only the features you need; other features are available as your needs change.

*User-Configured* – All the utilities accompany the Basic **ContainerTRACKER®** system to configure the most complex cyclic asset tracking systems. Complexity is relegated to the system configuration so operator actions remain simple.

### Standard Features

*Transaction Dependent Inventories* – When **ContainerTRACKER®** is configured the owner establishes inventory locations. Inventory locations are physical location or statuses (clean, damaged, etc.) for which they want to keep inventory. The inventory locations can be assigned initial values, have these values changed by administrators, or accept items from sources that are designated as appropriate entry and exit points from the system. Each of these sources provide an auditable method of changing the total of items by item type in the system. This creates a closed system with the simple rule, “Everything must be at one of the defined inventory locations”. This closed system is automatically established by configuring the system. Once this closed system is established, recording movement within the system is all that is required to maintain accurate inventories. This reduces the complexity of operator interactions and makes it possible to thoroughly train an operator in a few minutes. System complexity is isolated from operator actions.

*Configuration Based Rules* – When **ContainerTRACKER®** is configured the owner establishes movement rules by ‘attaching’ items to inventory locations. These rules prevent the operator from entering transactions (movements of items) that are inappropriate like moving Acme’s boxes to Superior’s locations. The operator cannot make that kind of tracking mistake (they can still make the physical mistake) because the inappropriate movements never appear as possible selections.

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*Transaction Modes (Main Screen)* – Three (3) transaction (asset movement) modes; Move, Find (for serialized items), and Inventory. The operator can select the mode most convenient for their immediate purpose. In ‘depot’ situations the ‘Find’ mode allows serialized items that show up ‘be found’ from their last location without the operator first determining where it was previously inventoried.

*Transaction Components* – Each transaction (movement) has minimally four information components; 1) which inventory location the item(s) are moved **From**, 2) the item type [and specific serial numbers if the item is serialized], 3) the inventory location the item(s) will be moved **To**, and, 4) the quantity of items [for serialized items this provided automatically by counting selected serial numbers].

*Transaction Selection* – The operator selects the moved **From** inventory location. This selection populates the items tree with only the items that are allowed at the selected location. When the operator selects the item to move it populates the moved **To** tree. The selections in the moved **To** tree represent the only inventory locations that may receive the item (in most systems all things are not allowed at every inventory location). The operator then enters the quantity of items moved. If the number of items moved would result in an inventory less than zero, the movement is prevented. The operator, based on their security permissions, may be allowed to add the items to inventory automatically. This is useful for existing systems where the actual quantity of items can only be estimated.

*Additional Transaction Information* – It is often useful or necessary to provide additional information with the transaction. This information may be the bill of lading, invoice number, carrier, etc. There are an additional 23 owner-configured fields of information that can be used. The owner configures the system to make these fields available if they so desire.

*Delayed (Pending) Transactions* – Transactions can be set to ‘pending’ if so desired. When an item leaves on location there is often a delay before it arrives at the receiving location. This feature automatically accommodates transportation time. The ‘Shipped To’ inventory is not added until the shipping time expires.

*Tracks Full or Allocated Inventory* – Tracks the System and Location Inventories for closed systems (you know where all items are) or your Organization’s Responsibility for open or pooled systems (you know where items are in your system but not your partner’s). Simple movement automatically calculates both system types. The operator doesn’t need system specific information. The owner configures the system to identify whether a specific inventory location is a ‘Source’ (a valid method of adding items to or removing items from the closed system). Movements to or from sources add or remove items from the system count.

*System Configuration Settings* – the system configuration setting can be displayed to determine the current system configuration. This is useful when initially configuring the system and when the system configuration changes.

*Backout* – Allows you to view recent transactions when work is interrupted. Errors can be eliminated by ‘backing out’ the incorrect transaction. This restores inventories and item locations to their condition before the transaction was entered.

*User Security* – A system administrator can assign user’s permissions as ‘Administrator’ (all privileges) or ‘User’. ‘Users’ can be given any combination of eleven (11) additional privileges. This allows you to grant permission to access features like access to reports, Custom Report definition, Email, changing

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inventory quantities, creating new items/locations on a person-by-person basis. All system administrators can add/delete users, reset their passwords and change their individual privileges.

*Configuration Utilities* – The configuration utilities are a collection of approximately 65 specific functions that configure **ContainerTRACKER**<sup>®</sup>'s hundreds of features. These utilities are accessed from a single screen that is restricted to users with the proper permissions.

*Reports* – **ContainerTRACKER**<sup>®</sup> allows the user to access their data in 62 formats that can be selected in several dozen million ways. This ensures that the precise, specific management information is available by simple selection procedures familiar terms. The various report creation interfaces bring an amazing amount of power to the user through a simple, straightforward selection process. The reports are divided into three areas; 1) transaction reports, 2) inventory reports, and, 3) other reports. The other reports are a combination of simple selection that do not require an interface and configuration reports that identify system configuration.

All report selections in **ContainerTRACKER**<sup>®</sup> are data aware. Selections that are not represented in the data are disabled. Further selection options are built on previous selections. This prevents multiple selections from resulting in no data. This happens automatically to make the selection process easier for the user.

**Transaction Reports** – The data that populates transaction reports is selected from an interface screen that presents:

- 6 methods of location selection
- 24 methods of date selection
- 2 methods of transaction type selection
- transaction selection of individual items
- transaction selection by category
- 2 methods of item type selection
- transaction selection by user
- 2 methods of transaction status

The data can be presented on six styles of transaction reports.

**Inventory Selections** – The data that populates inventory reports is selected from an interface screen that presents:

- 3 methods of inventory location types
- 8 methods of inventory location selection
- 6 methods of item selection
- 2 methods of inventory focus

The data can be presented on six styles of inventory reports.

**Other Report Selections** – The other reports include approximately 42 functions for data that has limited or no selection required. These reports are generally system configuration (alarms, messages, contacts, etc.). Many are available for specific options.