TRAKA WEB LOST IFOB MANAGEMENT



Set iFob Lost days Mark an iFob as lost View Lost iFobs Chargeable iFobs View charged iFobs Re-detected iFobs Refund a lost iFob Additional Shortcuts Activity All Recommendations to the Customer

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The purpose of this document is to teach the User how to manage lost iFobs in their business in order to reduce instances of losses by implementing clear control processes. Traka Automotive software contains a complete Workflow Module for managing iFobs and this document provides step by step usage instructions, including how to identify potentially lost iFobs, mark these as lost, and implement a charging process with your staff for lost iFobs.

STEP 1. SET IFOB LOST DAYS

1. From the main menu on your desktop App, click **iFob** and then select **Manage Lost iFobs**.



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2. You are presented with the Dashboard for managing the Lost iFob process.

- 3. At the top of the screen, you can set number of days out of the system after which an iFob should be marked automatical ly as Missing. By default this number is 60 days. You can change this number to whatever you desire. There will always be iFobs out of the system (in use) but this does not mean they are lost. Set a number of days over which you believe the iFob is unlikely to return and is therefore lost.
- 4. Once you have set this value, click **apply filter**.

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STEP 2. MARK AN IFOB AS LOST

- 1. The **Missing** page presents a list of all the key cabinets connected to the server. Select the key cabinet you are interested in and click the + next to it.
- There are two options "Not Recently Removed" and "Not Recently Returned". Please select the second option by clicking + button next to it.
- 3. Select the iFob which you believe has been out of the system for too long and should be declared as lost.
- 4. In the bottom right corner of the screen click **Mark As Lost**.

NOTE: Once you have marked an iFob as lost, the system will automatically un-assign any Key that was attached to this iFob in the software.

- 5. You will get a pop up asking to confirm if the user shown is the last one that had the iFob out. This gives you an opportunity to re-allocate responsibility to an alternative user to the one shown by the system. If the user shown is not the one who lost it, click "No" and choose from the User List to select the responsible user.
- 6. Repeat the process for each iFob you would like to declare Lost.

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STEP 3. VIEW LOST iFOBS

- 1. Having completed Step 2, you can view all iFobs which have been marked as Lost. Click **Lost** in the top menu and expand the selection. You will now be presented with all iFobs that have been marked as lost.
- On this page, you will be able to see which iFob has been lost, who lost it and when. If the user was charged, it will show charge date too (See Step 4).

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NOTE: "When Charged" field refers to the date when the iFob was marked as chargeable in your system and it is up to your admin staff to now charge the user through Payroll deductions or any other process you follow. The Traka Automotive System DOES NOT charge users directly.

STEP 4. CHARGEABLE iFOBS

- Once an iFob has been marked as lost, it will be shown on the "Chargeable" page as potentially an item you could charge a User for. It is up to your business to decide whether you wish to implement a charging policy and how much you wish to charge users for each lost iFob.
- 2. If you wish to perform this step, select the iFob you want to make a charge for.
- 3. In the bottom right corner, click **Charge User**.
- 4. You will see a pop-up asking you once again to confirm whether the correct user is being charged. You have the option to change the user again at this stage if it isn't correct.

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STEP 5. VIEW CHARGED IFOBS

- 1. Having completed Step 4, you can view all iFobs which have been marked as Charged.
- Click Charged in the top menu and expand the selection. You will now be presented with all iFobs that have been marked as Charged.
- 3. On this page, you will be able to see which iFob has been Charged, who was charged for it and when.

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NOTE: "When Charged" field refers to the date when the iFob was marked as chargeable in your system and it is up to your admin staff to now charge the user through Payroll deductions or any other process you follow. The Traka Automotive System DOES NOT charge users directly.

STEP 6. REDETECTED iFOBS

It is possible that an iFob which was marked as Lost re-appears in your cabinet at a later date e.g. if a Service Customer returns 6 months later with the iFob still attached to their Keys.

- 1. To find all iFobs in ANY system, which have re-appeared after you Marked them as Lost, go to **Redetected** in the top menu.
- 2. You will be presented with a list of all Lost iFobs which have been "seen" by a Cabinet since being marked as Lost.
- 3. You will need to change the status of these because they are no longer "Lost". To do this, select the iFob and click Mark As Found in the bottom right corner.

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- 4. The System will ask you for the Tag Number attached to this iFob in case it has been removed since it was declared Lost. Please enter the Tag number.
- 5. The iFob will be moved back to your available pool of iFobs for general use by staff to assign keys.
- 6. If you had previously charged a user for this iFob, the system will automatically transfer this iFob to the Refundable tab as well.
- 7. In the refundable tab, you will see all user eligible for a refund if this is your company policy (see Step 7).

STEP 7. REFUND A LOST IFOB

- 1. Under **Refundable** you will see all users who should be refunded for lost iFobs which have since returned to a cabinet and had their status changed from "Lost".
- 2. Select each item in this list one at a time and click **Refund User** in the bottom right corner.



NOTE: It is up to your admin staff to refund the user through Payroll additions or any other process you follow. The Traka Automotive System DOES NOT refund users directly.

ADDITIONAL SHORTCUTS

On some occasions, an iFob which has been marked as lost may be found immediately by a user before it is even returned to the cabinet. It is possible to reverse the Lost status by Marking the iFob As Found without needing to return it to the cabinet.

- 1. Under Lost in the top menu, select which iFob has been found.
- 2. In the bottom right corner click Mark as Found.
- 3. You will be prompted to enter the new iFob label. If the found iFob has an iTag still attached to it, you can re-use this number.
- 4. Click Set iFob Label.
- 5. The iFob can now be returned to the system.

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ACTIVITY

The **Activity** tab shows all the Activity performed against iFobs and Users through the Step by Step process.

- Action refers to all activities against the lost iFob i.e. marked as lost, marked as Charged
- Forename & Surname refers to the user who made changes to the lost iFob on the software
- When refers to the date of action
- **Label** the iTag number associated with the iFob at the point of loss
- Serial the serial number for the actual iFob.

To find more details about the lost iFob, you can double click on the iFob in question which will open up a new tab with all details about the iFob i.e. Summary, Label, Activity, Held by or Alarms.

ALL

The All Page shows detailed Database transactional information which is useful for more complex analysis by a Traka Engineer should there be any requirement for diagnostics around this process

RECOMMENDATIONS

The process defined above can be implemented in a number of different ways by a customer. Most importantly, we recommend that each and every customer regularly conducts these steps in their software to keep the system clean and tidy and create a sense of ownership and responsibility upon users which will lead to fewer iFobs being lost in the first place.

The complete process can be conducted in a number of ways and at varying frequencies. For instance:

- 1. Suggested minimum frequency is monthly but weekly would be recommended.
- Responsibility for steps can be given to one Admin user or split amongst different staff across the business in different departments. Please contact your Traka Automotive repre sentative for advice and guidance on how to implement these steps in an effective way.

For more information on implementing this process, you can contact our dedicated Traka Automotive Account Manager who will be able to assist you.

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