



Traverse

Intelligent Tracking by PCS

Installation Guide for Traverse.

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6/10/2011

← Traverse →™ Installation Guide

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1. Introduction

Installing Traverse is straight forward and intuitive for users that have basic knowledge of Windows Operating Systems, SQL Server, IIS (Internet Information Services), Browser based applications, and Windows Security.

It is a good idea however to skim through this document before installing so that there are no after thoughts to cause a reinstall.

**** Very important Note ****

If you are installing Traverse on a PC that is not a server, please go to the Control Panel → Power Options and make certain that the PC will never shut down, hibernate, or otherwise render any hardware to stop working after a period of inactivity.

**** Very important Note ****

It is assumed that Traverse will be installed on its own server or PC and a SQL Server exists that will host the database aspect of the system. For small installations everything including SQL server can be installed on one server.

Choose the correct installation for your company. Traverse is packaged three ways, alone, with SQL 2008 Express x86, and with SQL 2008 Express x64.

- Traverse.exe
- Traverse64.exe
- Traverse_SQLEXP32bit.exe
- Traverse_SQLEXP64bit.exe

Use the installation checklist in section 5 to verify that all steps have been completed and to log the company name and SQL Server name. You will need the exact spelling of both the company name and SQL Server name to obtain a valid license key. Both entries are case sensitive. This means that "Hello How Are You" is not the same as "hello how are you". The capital letters are not the same as their lower case counter parts when an entry is "case sensitive".

Traverse is composed of several programs working in concert.

The "Back Office" or "Web Client" is the primary interface used to manage whatever it is that Traverse is tracking.

The "Web Service" is the interface by which all "Business" transactions are performed. In this regard a "Business" transaction is a "Check-Out", "Check-In", "Move", "Transfer", or other action for an asset.

The "Reporting Service" serves the "Web Client" by processing report requests and serving them to the "Web Client".

The "Interface Service" is the means by which data may be imported into and exported out of Traverse via the "Web Client".



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The “Archive Service” decides when data is moved to historical tables or purged from the system based on rules that you set up.

The “DB Maintenance” service manages nightly backups and overall database health. If the Traverse database is installed on a database server that serves other applications and your company employs DBAs that manage these databases then you can turn the “DB Maintenance” service off as long as the DBA sets up a backup and maintenance plan for you.

1.1. System Requirements

There are not many prerequisites but if the following is not installed or available please see to it before attempting to install Traverse

- Windows Operating System – 32 or 64 bit {Windows XP, Server 2003 , Server 2008, Windows Vista, Window 7, Windows Server 2012 Full GUI **}, Windows 8}
- Dot Net Framework v2.0.50727
- IIS – Internet Information Services v5, 6, or 7, or 7.5
 - If IIS 7 then IIS 6 management Compatibility
- SQL Server 2005 or 2008 or 2012
 - SQL Login must have “sysadmin” privileges
 - Supports SQL Express, Standard Edition and Enterprise Edition.
- Windows Login must have Administrator Privileges for installation

** Windows 2012 core is not supported. Traverse Requires Windows GUI for installation, configuration, and removal.

1.1.1. Traverse on its own 32 bit server

Minimum recommended configuration

4 GB RAM
2 CPUs
20 GB of unused disk space

1.1.2. Traverse on its own 64 bit server

Minimum recommended configuration

6 GB RAM
2 CPUs
20 GB of unused disk space

1.1.3. Traverse w/ SQL Express on a 32 bit server

Minimum recommended configuration

8 GB RAM
4 CPUs
50 GB of unused disk space

1.1.4. Traverse w/ with SQL Express on a 64 bit server



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Minimum recommended configuration

16 GB RAM

4 CPUs

50 GB of unused disk space

IIS (Internet Information Services) is required for the Traverse “Back Office” application and the Traverse Web Service. The Dot Net Framework must be registered to IIS.

Microsoft SQL Server 2005/2008 or SQL Express

Microsoft Internet Explorer 6.0 or higher. Traverse has been tested using Microsoft Internet Explorer 7.0, 8.0, 9.0, and 10.0. Traverse also works with Mozilla FireFox, Google Chrome, and Safari.

Administrative privileges of the installation PC or Server are required when installing this software.

1.2. Installing Traverse

Start the installation by double clicking the appropriate Traverse setup program

To install Traverse on a server or workstation with SQL server on a separate server run “Traverse.exe”

To install Traverse on Windows 2008 R2 or higher or Windows 7 64 bit or higher run “Traverse64.exe” Traverse64.exe will also run a PowerShell scripts and a DISM script to ensure that all windows features and roles are installed for you.

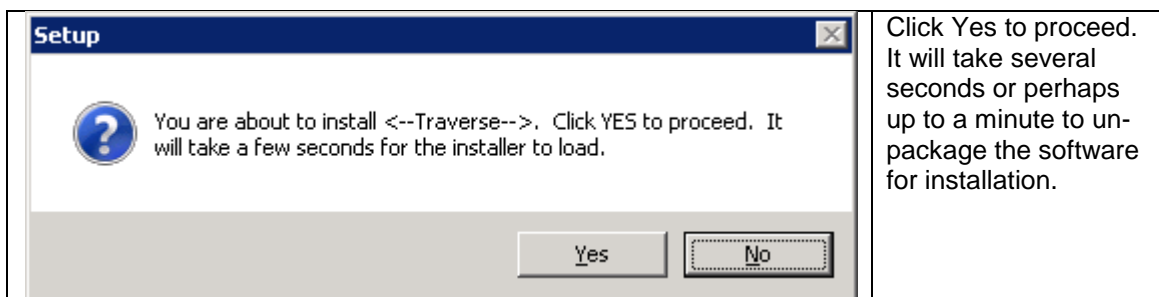
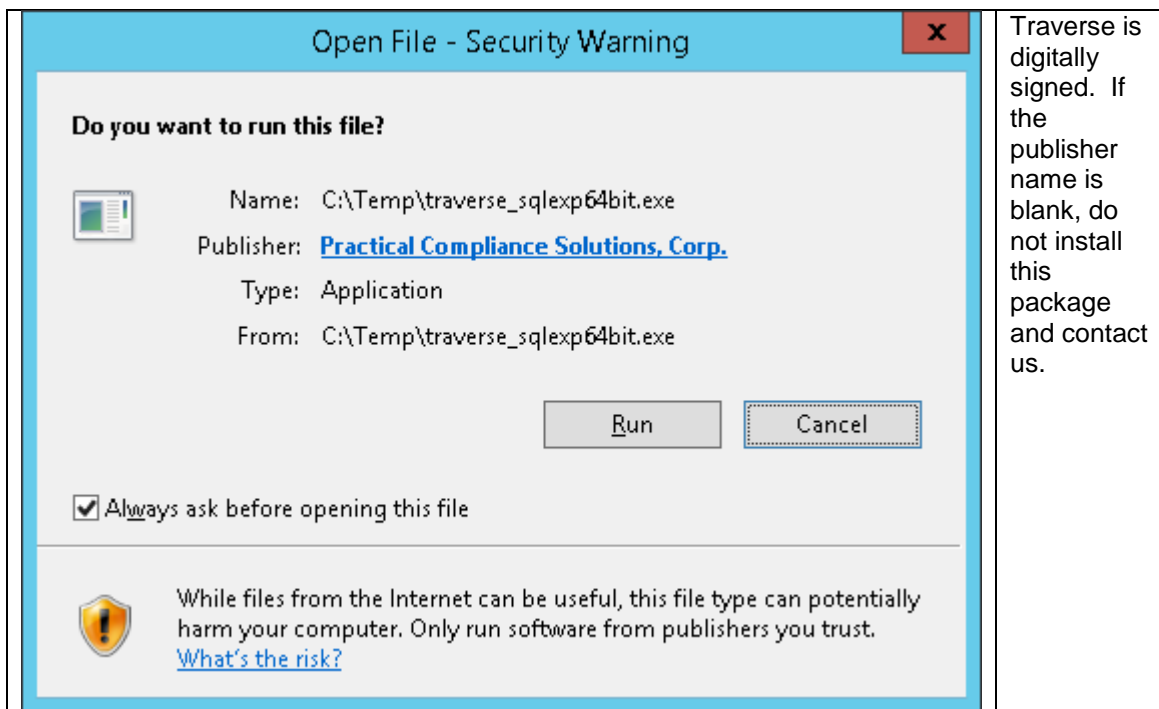
To install Traverse on a 32 bit operating system with SQL Express on the same server run “Traverse_SQLEXP32bit.exe”

To Install Traverse on a 64 bit operating system with SQL Express on the same server run “Traverse_SQLEXP64bit.exe”.

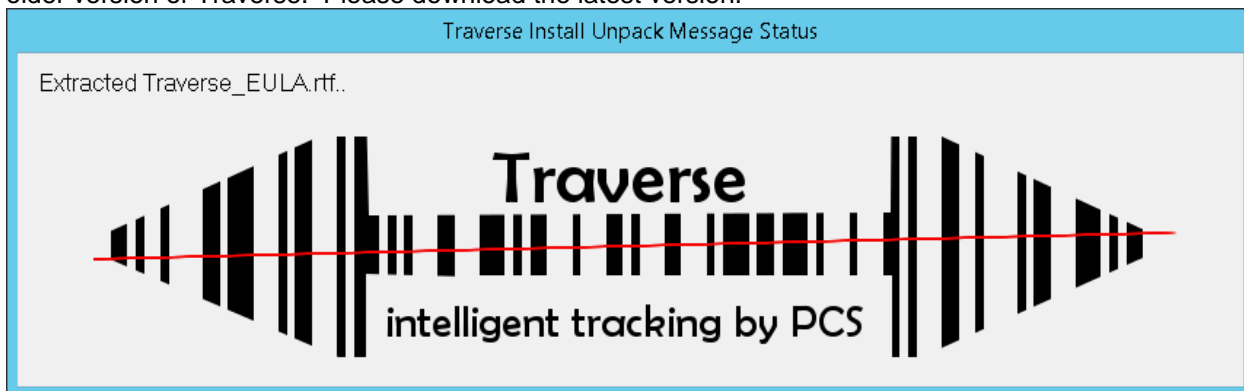
Assuming all of the prerequisites are installed on the installation server, after double clicking the appropriate setup program the following screen will appear.



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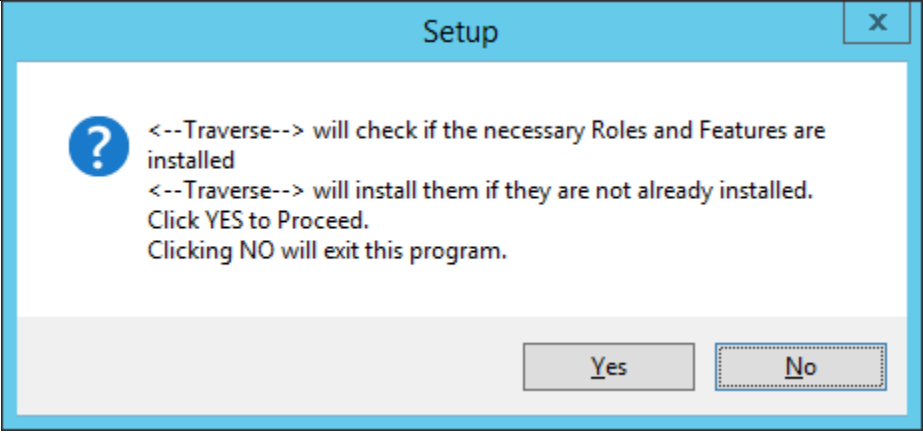
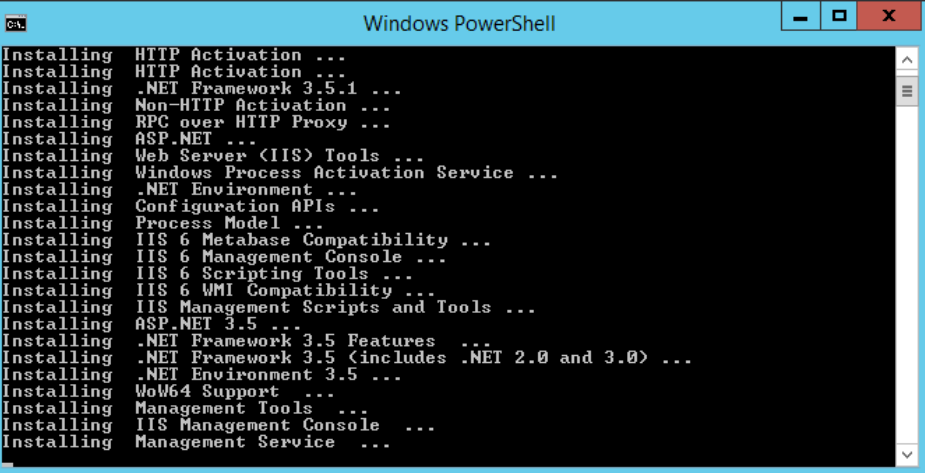
We have updated our unpack message box. If you do not see this logo, you are running an older version of Traverse. Please download the latest version.



After the software has been un-packaged the main installation screen for traverse will appear, pictured below.



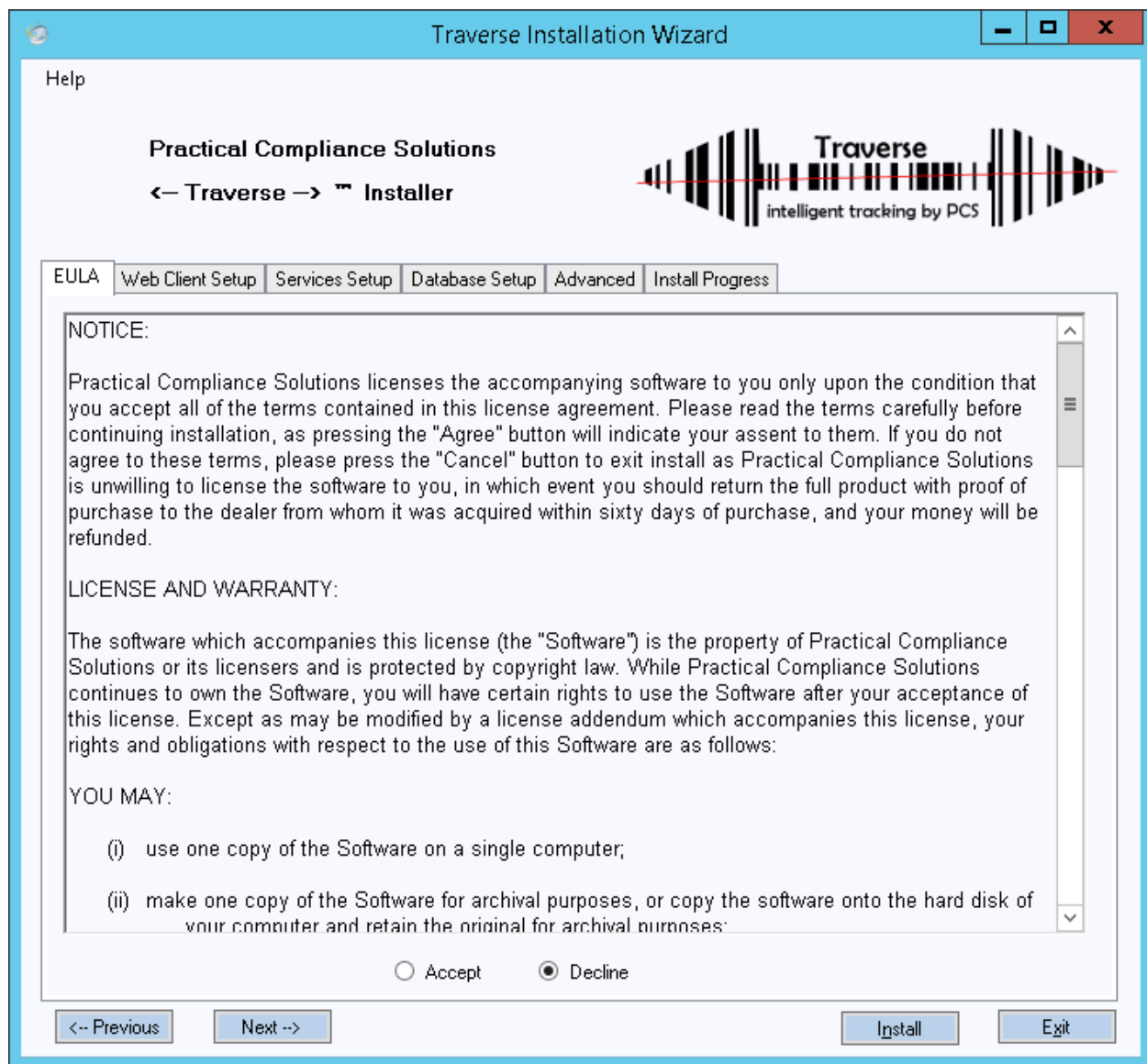
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	<p>Running any of the Traverse 64 bit installers will display this screen. Pressing “no” will exit the installation.</p>
	<p>PowerShell will install all necessary features and roles</p>

1.2.1. Traverse Web Client and Web Service Configuration

Accept the EULA – End User License Agreement

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Traverse Installation Wizard

Help

Practical Compliance Solutions
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Traverse
intelligent tracking by PCS

EULA Web Client Setup Services Setup Database Setup Advanced Install Progress

Web Client

Web Site: Default Web Site

Virtual Directory: Traverse

Port: 80 ☐ Use Windows Authentication

Web Service

Web Site: Default Web Site

Virtual Directory: TraverseWS

Port: 80

Logon Credentials

☒ Local System Account ☐ This Account

Account ID:

Password: Confirm Password:

<-- Previous Next --> Install Exit

The installation program can be used in wizard mode by clicking the “Previous” and “Next” buttons located at the bottom of the screen, or by clicking each tab and entering the data.

Unless absolutely necessary, it is best to keep the default values for the installation. If Traverse is to be installed on an intranet server and only used by active directory users then checking the box “Use Windows Authentication” will allow any domain user access to Traverse. Otherwise each user must log in via an email address.

The Logon Credentials section is for the Application Pools associated with the Web Client and Web Service. A specific account can be specified if necessary. For example if windows authentication is specified for SQL server access then specify an account that has adequate privileges to SQL server.

If you are installing Traverse on Windows XP, you will see two additional prompts for impersonation on the web client. This is because IIS 5 does not yet use application pools. Please enter a local administrator user account and password.



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1.2.2. Traverse Services Installation

The screenshot shows the 'Traverse Installation Wizard' window, specifically the 'Services Setup' tab. The window has a blue title bar and a light blue background. At the top, it says 'Practical Compliance Solutions' and '← Traverse →™ Installer'. To the right is the Traverse logo with the tagline 'intelligent tracking by PCS'. Below the logo is a navigation bar with tabs: 'EULA', 'Web Client Setup', 'Services Setup' (selected), 'Database Setup', 'Advanced', and 'Install Progress'. The main content area is divided into three sections: 'Install Path' with a text box containing 'c:\program files\Practical Compliance Solutions\Traverse' and a 'Browse' button; 'Logon Credentials' with radio buttons for 'Local System Account' (selected) and 'This Account', and text boxes for 'Account ID', 'Password', and 'Confirm Password'; and 'Enable Services' with two checked checkboxes: 'Enable Database Service' and 'Enable Archive Service'. At the bottom are buttons for '<-- Previous', 'Next -->', 'Install', and 'Exit'.

Enter the path where Traverse should be installed. If more than one disk is present, many times it is policy to install such programs on a disk other than the system disk.

The Logon Credentials apply to the Traverse services same as the Credentials for the Web Client and Web Services.

Traverse has two services that help maintain the health of the system. The Database Service performs backups and re-indexing tasks to mention a few. If you already have SQL maintenance plans set up for your SQL server, you can disable the database service. If however you are using SQL Express, then you cannot disable the database service.



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The archive service promotes database health by limiting the number of audit / transaction records in the live tables and in the historical tables. There are two system configurable thresholds for maintaining live data and historical data. One threshold is by date or age, and the second is by number of rows.

1.2.3. Traverse Database Configuration

The screenshot shows the 'Traverse Installation Wizard' window, specifically the 'Database Setup' tab. The window has a blue title bar and a light blue background. At the top, it says 'Practical Compliance Solutions' and '← Traverse →™ Installer'. There is a logo for 'Traverse intelligent tracking by PCS' on the right. Below the title bar, there are tabs for 'EULA', 'Web Client Setup', 'Services Setup', 'Database Setup' (selected), 'Advanced', and 'Install Progress'. The main content area is divided into two sections: 'SQL server Credentials' and 'SQL Server Disk Information'. The 'SQL server Credentials' section has fields for 'SQL Server:', 'Database:', 'Login ID:', and 'Password:'. There are radio buttons for 'SQL Authentication' and 'Windows Authentication'. A 'Test Connection' button is to the right of the 'Database:' field. Below these fields is a checkbox for 'Install SQL Express'. The 'Install Path:' field shows 'C:\SQLEXPRESS\'. A 'Browse' button is to the right. The 'SQL Server Disk Information' section has a table with columns 'Drive', 'MB Free', 'Database', and 'Transaction Log'. The table is currently empty. At the bottom of the window, there are buttons for '<-- Previous', 'Next -->', 'Install', and 'Exit'.

Drive	MB Free	Database	Transaction Log
-------	---------	----------	-----------------

Enter the SQL Server credentials and click the “Test Connection” button. Upon successful connection to SQL Server the disk and available drive space will appear. Select the disk where the Traverse database and transaction log should reside.



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The image shows a screenshot of the "Traverse Installation Wizard" window. The title bar reads "Traverse Installation Wizard". Below the title bar is a "Help" button. The main window has a header area with "Practical Compliance Solutions" and "← Traverse →™ Installer" on the left, and the "Traverse" logo with the tagline "intelligent tracking by PCS" on the right. Below the header is a tabbed interface with tabs for "EULA", "Web Client Setup", "Services Setup", "Database Setup", "Advanced", and "Install Progress". The "Database Setup" tab is currently selected. The "SQL server Credentials" section contains the following fields: "SQL Server:" with the value "PCSVSERVER013B", "Database:" with the value "Traverse", "Login ID:" with the value "sa", and "Password:" with a masked password. There are radio buttons for "SQL Authentication" (selected) and "Windows Authentication". A "Test Connection" button is to the right of the "SQL Server" field. Below these fields is a checkbox for "Install SQL Express" which is currently unchecked. The "Install Path:" field shows "C:\SQLEXPRESS" and has a "Browse" button next to it. The "SQL Server Disk Information" section contains a table with the following data:

	Drive	MB Free	Database	Transaction Log
▶	C:	3,163	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	E:	3,053	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the window are four buttons: "<-- Previous", "Next -->", "Install", and "Exit".

If you are installing a version of Traverse that is packaged with SQL Express, you will see the screen below. By checking the Check Box labeled "Install SQL Express, the Traverse installation package will install SQL Express. Refer to the "Installing Traverse with SQL Express" section of this document for more information.



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The image shows the 'Traverse Installation Wizard' window, specifically the 'Database Setup' step. The window has a title bar with 'Traverse Installation Wizard' and standard window controls. Below the title bar is a 'Help' button. The main area is divided into two sections. The top section, 'SQL server Credentials', contains fields for 'SQL Server' (PCSVSERVER060\TraverseSQL), 'Database' (Traverse), 'Login ID' (sa), and 'Password' (masked with dots). There are radio buttons for 'SQL Authentication' (selected) and 'Windows Authentication'. A 'Test Connection' button is to the right. Below these is a checkbox for 'Install SQL Express' which is checked. The 'Install Path' is C:\SQLEXPRESS with a 'Browse' button. The bottom section, 'SQL Server Disk Information', contains a table with columns: Drive, MB Free, Database, and Transaction Log. The table has two rows: C: (3,163 MB Free, Database and Transaction Log checked) and E: (3,053 MB Free, Database and Transaction Log unchecked). At the bottom of the window are four buttons: '<-- Previous', 'Next -->', 'Install', and 'Exit'.

Traverse Installation Wizard

Help

Practical Compliance Solutions
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EULA | Web Client Setup | Services Setup | Database Setup | Advanced | Install Progress

SQL server Credentials

SQL Server: PCSVSERVER060\TraverseSQL Test Connection

Database: Traverse

☒ SQL Authentication ☐ Windows Authentication

Login ID: sa Password:

☒ Install SQL Express

Install Path: C:\SQLEXPRESS Browse

SQL Server Disk Information

	Drive	MB Free	Database	Transaction Log
▶	C:	3,163	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	E:	3,053	<input type="checkbox"/>	<input type="checkbox"/>

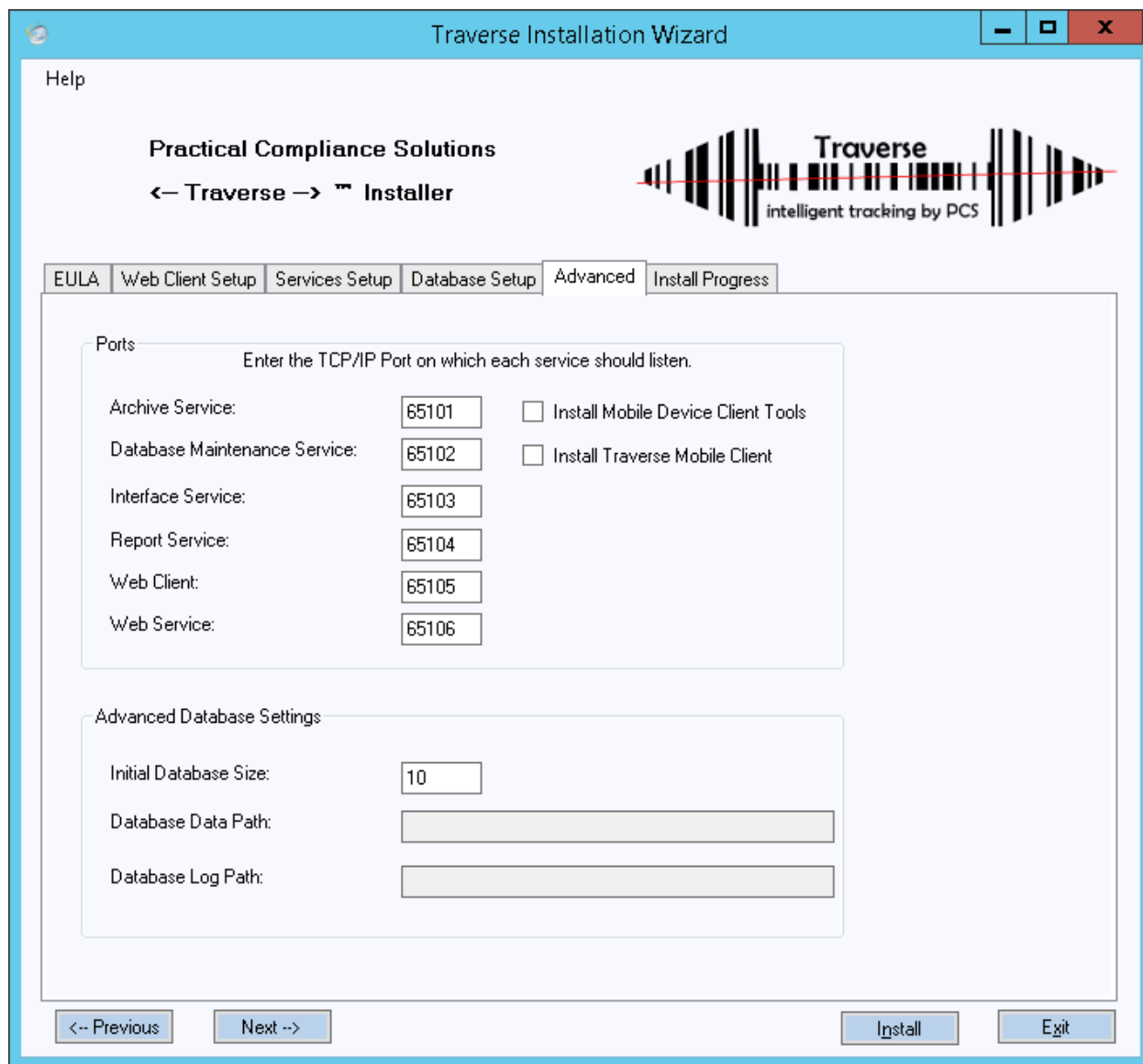
<-- Previous Next --> Install Exit

1.2.4. Traverse Service Ports

The traverse services communicate via TCP/IP. The Report and Interface Services listen for instructions on their own port. By default the Report Service listens on port 65104 and the interface service listens on port 65103. These ports can be changed. Use caution as you do not want to use a port that is already used by another service. This is one of the ways the services communicate with each other.



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The screenshot shows the 'Traverse Installation Wizard' window, specifically the 'Advanced' tab. The window has a blue title bar with standard Windows controls. Below the title bar, there's a 'Help' link. The main content area is divided into two sections: 'Ports' and 'Advanced Database Settings'. The 'Ports' section contains a list of services with their respective TCP/IP ports and checkboxes for optional mobile client tools. The 'Advanced Database Settings' section contains fields for initial database size, data path, and log path. At the bottom, there are navigation buttons: '<-- Previous', 'Next -->', 'Install', and 'Exit'.

Traverse Installation Wizard

Help

Practical Compliance Solutions
← Traverse →™ Installer

Traverse
intelligent tracking by PCS

EULA | Web Client Setup | Services Setup | Database Setup | **Advanced** | Install Progress

Ports
Enter the TCP/IP Port on which each service should listen.

Archive Service:	65101	<input type="checkbox"/> Install Mobile Device Client Tools
Database Maintenance Service:	65102	<input type="checkbox"/> Install Traverse Mobile Client
Interface Service:	65103	
Report Service:	65104	
Web Client:	65105	
Web Service:	65106	

Advanced Database Settings

Initial Database Size:	10
Database Data Path:	
Database Log Path:	

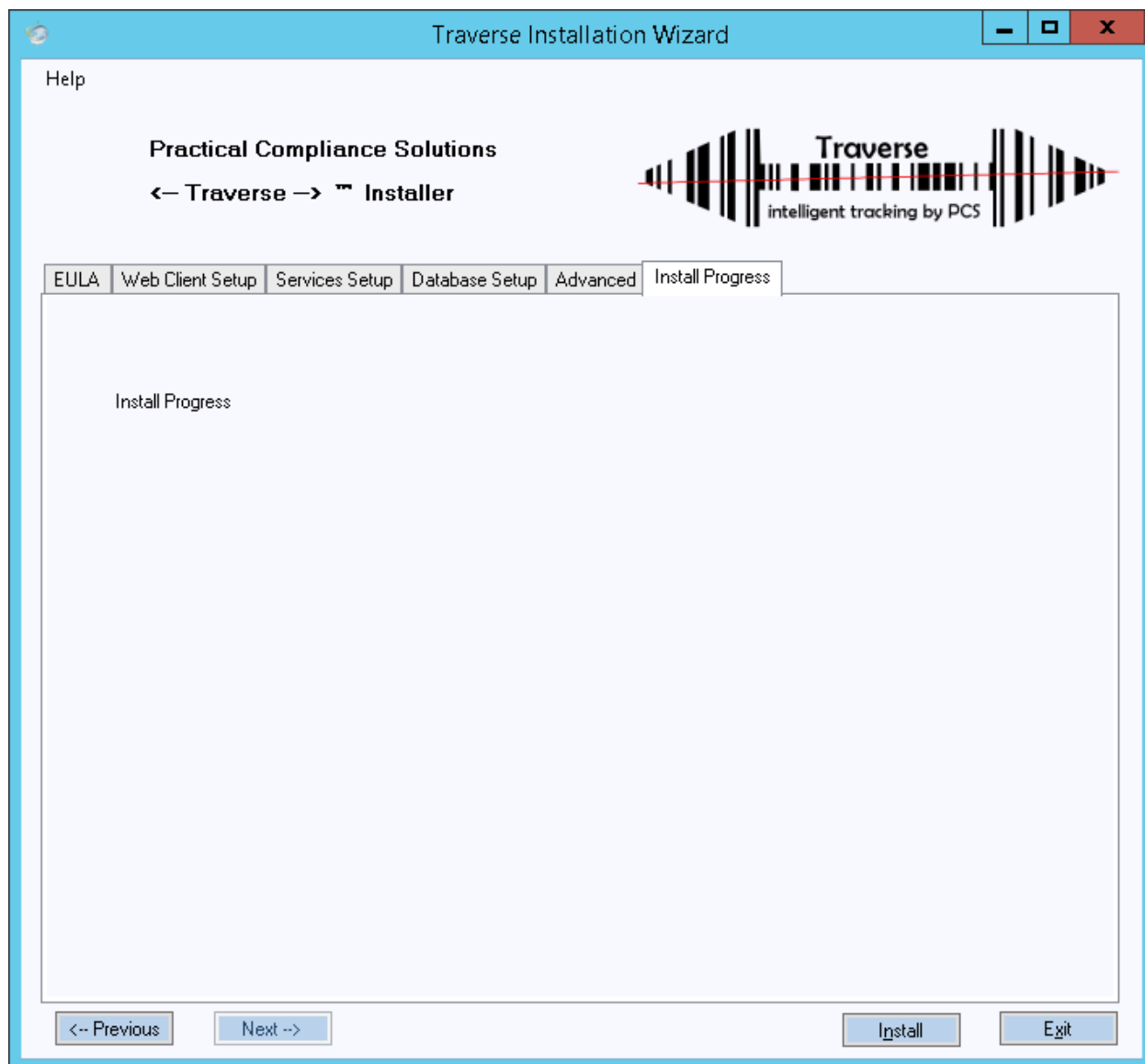
<-- Previous | Next --> | Install | Exit

You can enter an initial database size and or installation path for the database files. When creating a new database on SQL server, the minimum size of a new database must be greater than or equal to the size of the SQL Server system database named model. By default the model database is 2MB for SQL 2008 and 4MB for SQL 2012. The default size for Traverse is 10MB.

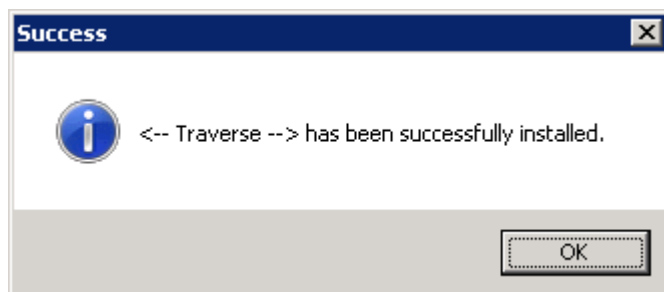
Click install. A message indication the installation is complete will appear as soon as Traverse is fully installed.



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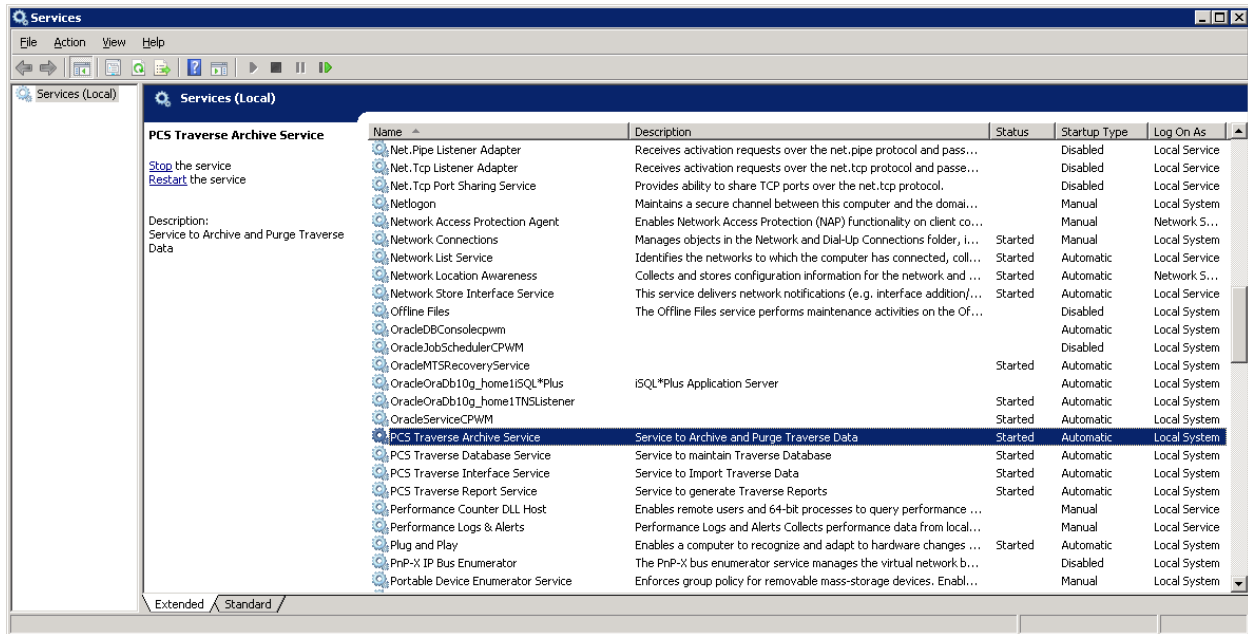
Click OK and then Click Exit on the installer screen.



Click the Windows Start menu and click "Run". Type "services.msc" in the run prompt and press enter. Scroll down alphabetically to PCS and you will see the four new Traverse Services



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2. Starting Traverse

From the server you can launch the Traverse Web Client by typing <http://localhost/traverse> in the browser's URL window. Similarly you can see the traverse web service type typing <http://localhost/traversews/traversews.aspx>

If you are using IE9 (Internet Explorer 9) your local host and server name must be added to "Trusted Sites".

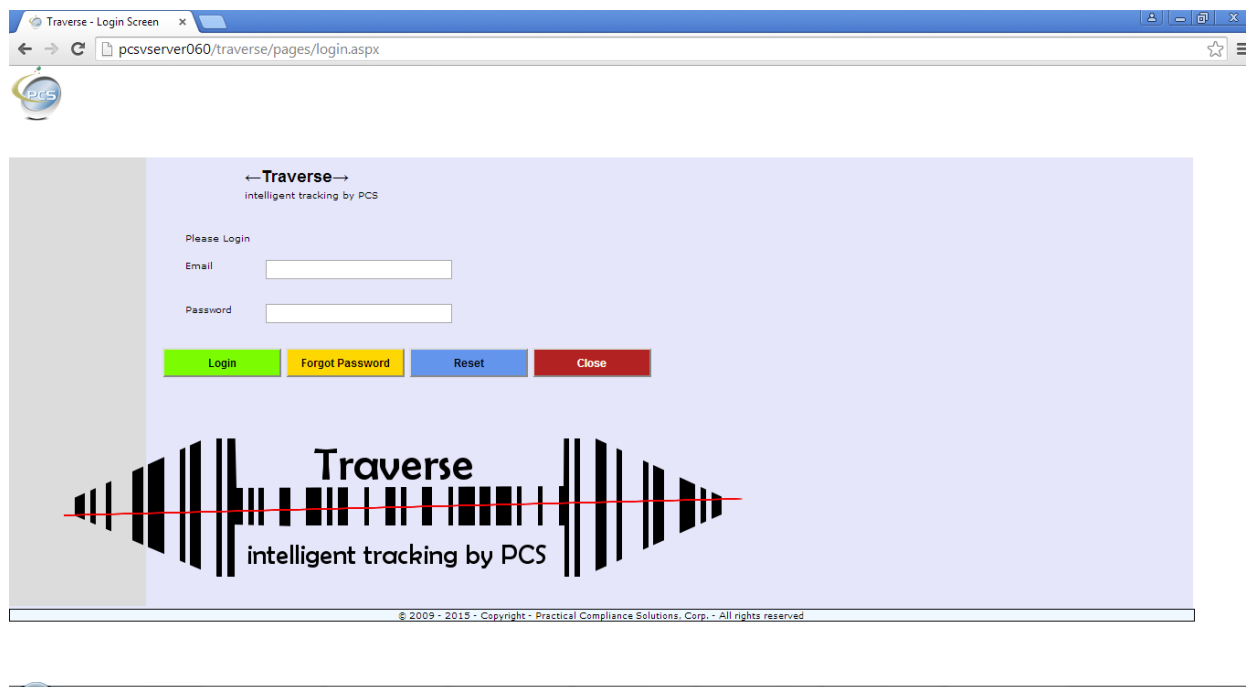
Or if you prefer you can start traverse from a workstation by typing the traverse URL in the browser.

For example <http://yourserver/traverse>

You will see the traverse login screen if you did not check the "Use Windows Authentication" check box when installing traverse.

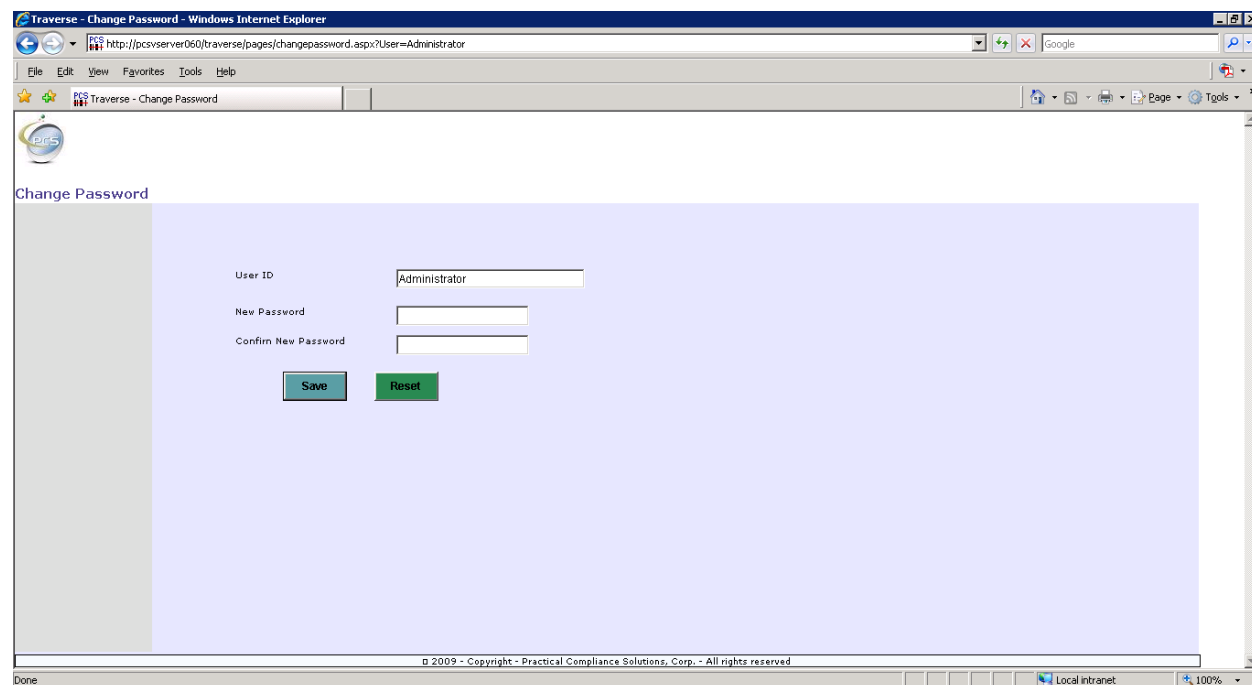


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The screenshot shows a web browser window titled "Traverse - Login Screen". The address bar displays "pcsrvserver060/traverse/pages/login.aspx". The login page has a light blue background with a grey sidebar on the left. At the top, it says "← Traverse →" and "intelligent tracking by PCS". Below this, there is a "Please Login" section with two text input fields labeled "Email" and "Password". Underneath the fields are four buttons: "Login" (green), "Forgot Password" (yellow), "Reset" (blue), and "Close" (red). A large graphic in the center features the word "Traverse" in a bold, black font, with "intelligent tracking by PCS" below it. The graphic is flanked by two sets of vertical black bars of varying heights, resembling a barcode or a stylized signal. A red horizontal line crosses through the center of the graphic. At the bottom of the page, a small copyright notice reads "© 2009 - 2015 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved".

Type Administrator in the email text box and click the login button. You will be prompted to change the Administrator's password.

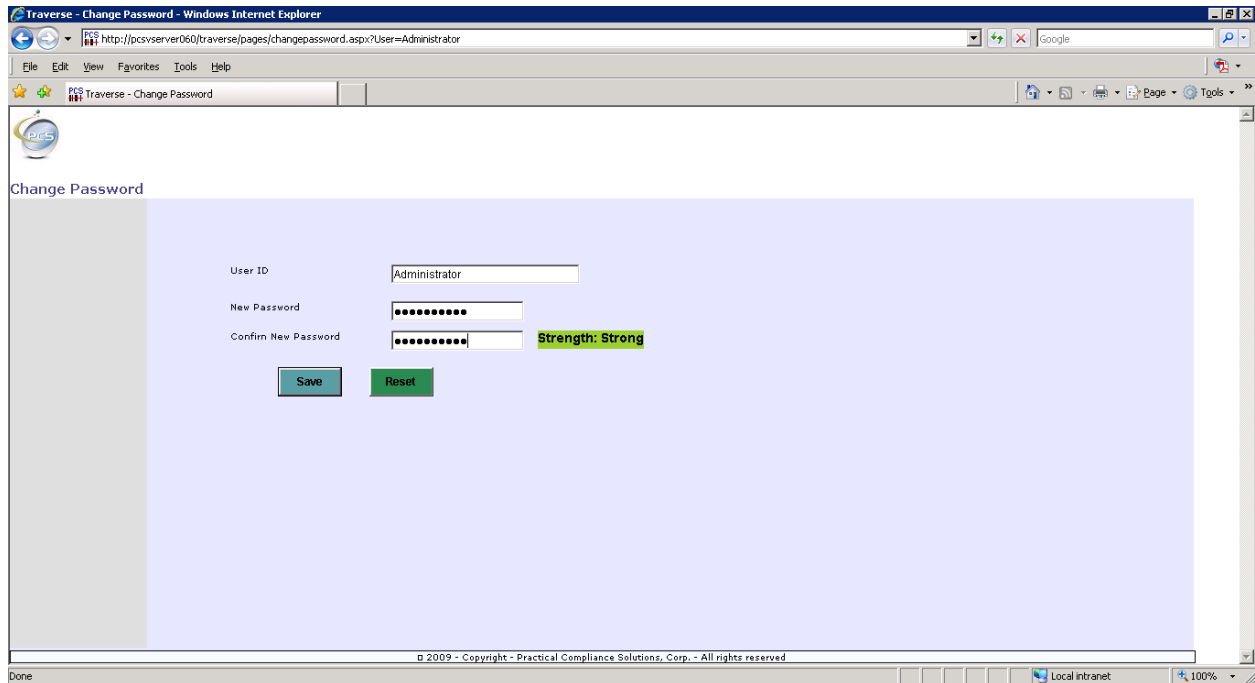


The screenshot shows a web browser window titled "Traverse - Change Password - Windows Internet Explorer". The address bar displays "http://pcsrvserver060/traverse/pages/changepassword.aspx?User=Administrator". The page has a light blue background with a grey sidebar on the left. At the top, it says "Change Password". Below this, there is a "User ID" field with the text "Administrator" entered. Underneath the "User ID" field are two text input fields labeled "New Password" and "Confirm New Password". Below these fields are two buttons: "Save" (green) and "Reset" (green). At the bottom of the page, a small copyright notice reads "© 2009 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved".

A password strength indicator will guide you



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3. Licensing Traverse

Once you have changed the password, you must either provide the Traverse License or get a temporary license. To get a temporary Traverse License, the computer you are using must have access to the Internet.



Click the "ADMIN" menu and then click "System Configuration".



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Traverse - System Config - Windows Internet Explorer

http://pcsvserver060/traverse/pages/systemconfig.aspx

File Edit View Favorites Tools Help

Traverse - System Config

Welcome Administrator Administrator

System Configuration

HOME
TASKS
INTERFACE
REPORTS
ADMIN
SECURITY

Change Password
Asset Types
Asset Relationships
Category Codes
Class Codes
Departments
Location Types
Locations
Manufacturers
System Configuration

Logout
License

Find Clear Save Delete Print

Record Saved Successfully.

Click the X to close this message

Enter your company data as shown and click the “Save” button.

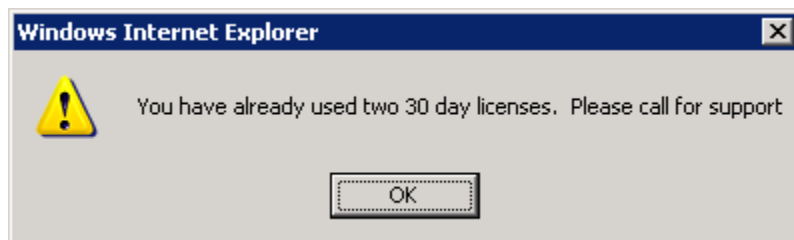
You are now ready to click the “License” button.

You should receive a message like the following:



You now have a thirty day trial license to try Traverse free of charge. During this time you may call or email support for answers to get you started.

You are entitled to two 30 day trial licenses. If you have used both of your trial licenses you will receive a message like the following.



After your second license you must call for a real license.



4. Configuring Traverse for your business

Before you use Traverse there are certain configuration items that you must supply.

Under the “ADMIN” menu there are several categories that require attention before you can add assets.

It makes sense to create them in this order:

- 1) Category Codes
- 2) Class Codes
- 3) Status Codes
- 4) Departments
- 5) Site
- 6) Building
- 7) Location Types
- 8) Locations
- 9) Manufacturers
- 10) Asset Types
- 11) Asset Relationships

Under the security menu add yourself as a Traverse Administrator with security privileges.

4.1. The Administrative menu

All of the administrative screens and all of the security screens use the same buttons. The buttons are in the same order and the same color for each screen.



4.1.1.1. The Find Button

From a blank screen, the find button presents a list of records from which you may choose. To narrow your search you may type some data in any of the fields on the screen and press find. If an exact match is found, the record will be presented on the screen. If no match is found then a message indicating so will appear and the screen will remain blank or with the text you typed still in place. If more than one record is found then a list will appear.

4.1.1.2. The Clear Button

Clicking the clear button clears the screen.

4.1.1.3. The Save Button

Clicking the save button saves the data on the screen to the database. The saved record remains on the screen after saving.

4.1.1.4. The Delete Button

Clicking the delete button deletes the current record. The deleted record remains on the screen so it can be resaved if desired.

4.1.1.5. The Print Button

The print button “if implemented” either prints the current record on the screen, or prints a simple report in the context of the screen.



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4.1.2. Adding Category Codes

Category Codes are used as a way to group your assets together in a way that has meaning for your business. For example if you are tracking IT equipment you could create category codes like, servers, laptops, workstations. All are computers but this allows you to separate your computers by type.

The screenshot shows a web browser window titled "Traverse - Category Codes - Windows Internet Explorer". The address bar shows the URL "http://pcsvserver060/traverse/Pages/categorycodes.aspx". The page content includes a welcome message "Welcome Thomas Romeo" and a "Category Maintenance" section. On the left, there is a navigation menu with categories: HOME, TASKS, INTERFACE, REPORTS, ADMIN, and SECURITY. The ADMIN category is expanded, showing a list of options: Change Password, Asset Types, Asset Relationships, Category Codes, Class Codes, Departments, Sites, Buildings, Location Types, Locations, Manufacturers, Status Codes, and System Configuration. The main content area has two input fields: "Category ID:" and "Name:", both marked as "Required". Below these fields are five buttons: Find, Clear, Save, Delete, and Print. The footer of the page contains the copyright notice "© 2009 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved".



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4.1.3. Adding Class Codes

Class codes are much like category codes and can be used completely separately or as sub-categories. In the above example there is a category called “servers” there could be class codes describing the server such as “blade” or “tower”, or class codes could be setup to mean something completely different such as “refurbished” or “new”, again use class codes as they make sense for your business.

The screenshot shows a web browser window titled "Traverse - Class Codes - Windows Internet Explorer". The address bar shows the URL "http://pcsvserver060/traverse/Pages/classcodes.aspx". The page content includes a sidebar with navigation links: HOME, TASKS, INTERFACE, REPORTS, and ADMIN (highlighted in yellow). Under ADMIN, there is a list of links: Change Password, Asset Types, Asset Relationships, Category Codes, Class Codes, Departments, Sites, Buildings, Location Types, Locations, Manufacturers, Status Codes, and System Configuration. Below this list is a "SECURITY" section with a "Logout" button. The main content area is titled "ClassCode Maintenance" and contains two input fields: "ClassCode ID:" and "Name:", both marked as "Required". Below these fields are five buttons: Find, Clear, Save, Delete, and Print. The footer of the page displays the copyright notice: "© 2009 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved".



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4.1.4. Adding Departments

Typically an asset will belong to a particular department.

Traverse - Departments - Windows Internet Explorer

http://pcsvserver060/traverse/Pages/departments.aspx

File Edit View Favorites Tools Help

Traverse - Departments

Welcome Thomas Romeo

Department Maintenance

HOME

TASKS

INTERFACE

REPORTS

ADMIN

Change Password

Asset Types

Asset Relationships

Category Codes

Class Codes

Departments

Sites

Buildings

Location Types

Locations

Manufacturers

Status Codes

System Configuration

SECURITY

Logout

Department ID: Required

Name: Required

Find Clear Save Delete Print

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Done Local intranet 100%



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4.1.5. Adding Location Types

Before adding locations, you must enter at least one location type. Location types are used to categorize locations. A location Type can be as simple and broad as “warehouse” or as granular as “aisle” or “bin”, “yard”, “Door”, “File Room”, “Office”, “Box”, “Mail Cart”.

Traverse - Location Types - Windows Internet Explorer

http://pcsvserver060/traverse/Pages/locationtypes.aspx

File Edit View Favorites Tools Help

Traverse - Location Types

Welcome Thomas Romeo

Location Type Maintenance

HOME

TASKS

INTERFACE

REPORTS

ADMIN

Change Password

Asset Types

Asset Relationships

Category Codes

Class Codes

Departments

Sites

Buildings

Location Types

Locations

Manufacturers

Status Codes

System Configuration

SECURITY

Logout

Type ID: Required

Description: Required

Prefix:

Find Clear Save Delete Print

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Done

Local intranet 100%



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4.1.6. Adding Sites

Traverse offers the ability to track assets stored at different sites. For example, you may have a warehouse in Pennsylvania and another in Iowa. Each site might be like a campus with more than one building at each.

If this is not the case then a single default site is required to add locations. Just create a site called “HOME” for example or CHQ – Corporate Headquarters.

The screenshot shows a web browser window titled "Traverse - Sites - Windows Internet Explorer". The address bar shows the URL "http://pcsvserver060/traverse/Pages/sites.aspx". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The toolbar includes "Back", "Forward", "Home", "Stop", "Reload", "Print", "Page", and "Tools". The main content area displays the "Traverse - Sites" page. On the left, there is a navigation menu with the following items: "HOME", "TASKS", "INTERFACE", "REPORTS", "ADMIN", and "SECURITY". The "ADMIN" item is highlighted in yellow. Below the "ADMIN" item, there is a list of links: "Change Password", "Asset Types", "Asset Relationships", "Category Codes", "Class Codes", "Departments", "Sites", "Buildings", "Location Types", "Locations", "Manufacturers", "Status Codes", and "System Configuration". The "SECURITY" item is also highlighted in blue. Below the "SECURITY" item, there is a "Logout" button. The main content area of the page is a light blue background. It contains a form with two input fields: "Site ID:" and "Site Name:". Both fields have a red "Required" label next to them. Below the input fields, there are five buttons: "Find", "Clear", "Save", "Delete", and "Print". At the bottom of the page, there is a copyright notice: "© 2009 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved". The status bar at the bottom of the browser window shows "Done" and "Local intranet".



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4.1.7. Adding Buildings

At least one building is required to add locations. If you plan to track assets that are only in one building then just create one building.

Traverse - Building Maintenance - Windows Internet Explorer

http://pcsvserver060/traverse/Pages/buildings.aspx

File Edit View Favorites Tools Help

Traverse - Building Maintenance

Welcome Thomas Romeo

Buildings Maintenance

HOME

TASKS

INTERFACE

REPORTS

ADMIN

Change Password

Asset Types

Asset Relationships

Category Codes

Class Codes

Departments

Sites

Buildings

Location Types

Locations

Manufacturers

Status Codes

System Configuration

SECURITY

Logout

Building ID: Required

Building Name: Required

Find Clear Save Delete Print

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Done Local intranet 100%



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4.1.8. Adding Locations

At least one location must exist before any assets can be added.

Traverse - Location Maintenance - Windows Internet Explorer

http://pcsvserver060/traverse/Pages/locations.aspx

File Edit View Favorites Tools Help

Traverse - Location Maintenance

Welcome Thomas Romeo

Location Maintenance

HOME

TASKS

INTERFACE

REPORTS

ADMIN

Change Password

Asset Types

Asset Relationships

Category Codes

Class Codes

Departments

Sites

Buildings

Location Types

Locations

Manufacturers

Status Codes

System Configuration

SECURITY

Logout

Location ID: Required

Description: Required

Location Type: [Dropdown]

Site: [Dropdown]

Building: [Dropdown]

Capacity: [Text]

Floor: [Text]

Area: [Text]

Zone: [Text]

Status: [Dropdown]

Find Clear Save Delete Print

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Done

Local Intranet 100%



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4.1.9. Adding Manufacturers

Add manufacturers (make and model) if you plan to track assets with serial numbers.

Traverse - Manufacturers - Windows Internet Explorer

http://pcsvserver060/traverse/pages/manufacturers.aspx

Welcome Thomas Romeo

Manufacturer Maintenance

HOME

TASKS

INTERFACE

REPORTS

ADMIN

Change Password

Asset Types

Asset Relationships

Category Codes

Class Codes

Departments

Sites

Buildings

Location Types

Locations

Manufacturers

Status Codes

System Configuration

SECURITY

Logout

Manufacturer ID: Required

Name: Required

Address:

City: State: ZIP:

Phone: FAX:

Find Clear Save Delete Print

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4.1.10. Adding Asset Types

The power of Traverse begins with asset types. Assets of a given type can be containers that contain other assets, can be contained within other assets, depreciable, and can unlock additional optional fields for custom definitions.

Traverse - Asset Types - Windows Internet Explorer

http://pcsvserver060/traverse/pages/assettypes.aspx

Welcome Thomas Romeo

Asset Type Maintenance

HOME TASKS INTERFACE REPORTS ADMIN

Change Password
Asset Types
Asset Relationships
Category Codes
Class Codes
Departments
Sites
Buildings
Location Types
Locations
Manufacturers
Status Codes
System Configuration

SECURITY Logout

Asset Types Optional & Custom Fields

Type ID: FC
Description: File Cabinet
Prefix:

☒ Can Be Container ☐ Can Be Contained ☐ Depreciable

Find Clear Save Delete Print

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Traverse - Asset Types - Windows Internet Explorer

http://pcsvserver060/traverse/pages/assettypes.aspx

Welcome Thomas Romeo

Asset Type Maintenance

HOME TASKS INTERFACE REPORTS ADMIN

Change Password
Asset Types
Asset Relationships
Category Codes
Class Codes
Departments
Sites
Buildings
Location Types
Locations
Manufacturers
Status Codes
System Configuration

SECURITY Logout

Asset Types Optional & Custom Fields

Type ID: CS
Description: Computers (Servers)
Prefix:

☐ Can Be Container ☐ Can Be Contained ☒ Depreciable

Depreciation Type: Declining Balance Depreciation Number of Years: 5

The declining balance depreciation method uses the depreciable basis of an asset multiplied by a factor based on the life of the asset. The depreciable basis of the asset is the book value of the first asset -- cost less accumulated depreciation.

The factor is the percentage of the asset that would be depreciated each year under straight line depreciation times the acceleration. For example, an asset with a four-year life would have 25% of the cost depreciated each year. Using double declining balance or 200%, which is the most common, would mean that depreciation expense in the first year would be twice that of 50%. So to calculate the depreciation expense each year the depreciable basis would be multiplied by 50%.

Example: An item is purchased for \$1000. The expected life is 4 years. Using double declining balance the depreciation would be calculated as follows:

Factor = $2 * (1/4) = 0.50$

Year	Basis	Calculation	Expense
1	1000.00	1000.00 * .50	500.00
2	500.00	500.00 * .50	250.00
3	250.00	250.00 * .50	125.00
4	125.00	125.00 * .50	62.50

Select a tab

Find Clear Save Delete Print

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Defining assets types allows you to enable optional data elements and custom data elements.

The screenshot shows the 'Traverse - Asset Types' web application in a Windows Internet Explorer browser. The page title is 'Traverse - Asset Types' and the URL is 'http://pcsvserver060/traverse/pages/assettypes.aspx'. The browser's address bar shows the URL, and the search bar contains 'Google'. The page has a navigation menu on the left with links for HOME, TASKS, INTERFACE, REPORTS, and ADMIN. The ADMIN section is expanded, showing sub-links like Change Password, Asset Types, Asset Relationships, Category Codes, Class Codes, Departments, Sites, Buildings, Location Types, Locations, Manufacturers, Status Codes, and System Configuration. The main content area is titled 'Asset Type Maintenance' and has two tabs: 'Asset Types' and 'Optional & Custom Fields'. The 'Optional & Custom Fields' tab is active, displaying two tables. The 'Optional Fields' table has columns 'Used', 'Field Name', and 'Label Text'. It lists fields like LastServiceDate, ManufactureId, Model, PurchaseDate, PurchasePrice, SerialNumber, ServiceAgreement, ServiceAgreementEndDate, ServiceDueDate, Warrantee, and WarranteeEndDate. The 'Custom Fields' table also has columns 'Used', 'Field Name', and 'Label Text'. It lists custom fields like CustomBit001, CustomBit002, CustomBit003, CustomBit004, CustomChar001, CustomChar002, CustomChar003, CustomChar004, CustomDate001, CustomDate002, CustomDate003, CustomDate004, and CustomNumber001. At the bottom of the page, there are buttons for Find, Clear, Save, Delete, and Print. The footer of the page contains the copyright notice '© 2009 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved' and the text 'Local Intranet'.

Welcome Thomas Romeo

Asset Type Maintenance

Asset Types Optional & Custom Fields

Optional Fields:

Used	Field Name	Label Text
<input checked="" type="checkbox"/>	LastServiceDate	Last Serviced
<input checked="" type="checkbox"/>	ManufactureId	Make
<input checked="" type="checkbox"/>	Model	Model
<input checked="" type="checkbox"/>	PurchaseDate	Purchased
<input checked="" type="checkbox"/>	PurchasePrice	Price
<input checked="" type="checkbox"/>	SerialNumber	S/N
<input checked="" type="checkbox"/>	ServiceAgreement	Service Agreement
<input checked="" type="checkbox"/>	ServiceAgreementEndDate	Service Agreement
<input checked="" type="checkbox"/>	ServiceDueDate	Service Due Date
<input checked="" type="checkbox"/>	Warrantee	Warrantee
<input checked="" type="checkbox"/>	WarranteeEndDate	Warrantee EXP.

Custom Fields:

Used	Field Name	Label Text
<input checked="" type="checkbox"/>	CustomBit001	Refurbished
<input type="checkbox"/>	CustomBit002	CustomBit002
<input type="checkbox"/>	CustomBit003	CustomBit003
<input type="checkbox"/>	CustomBit004	CustomBit004
<input type="checkbox"/>	CustomChar001	CustomChar001
<input type="checkbox"/>	CustomChar002	CustomChar002
<input type="checkbox"/>	CustomChar003	CustomChar003
<input type="checkbox"/>	CustomChar004	CustomChar004
<input type="checkbox"/>	CustomDate001	CustomDate001
<input type="checkbox"/>	CustomDate002	CustomDate002
<input type="checkbox"/>	CustomDate003	CustomDate003
<input type="checkbox"/>	CustomDate004	CustomDate004
<input type="checkbox"/>	CustomNumber001	CustomNumber001

Find Clear Save Delete Print

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Local Intranet 100%



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4.1.11. Asset Relationships

Adding asset relationships defines the rules as to which asset types can be contained within other asset types. In the case below A storage box can contain smaller storage boxes and gussets. Gussets on the other hand can be contained by boxes and file cabinets and can contain file folders.

The screenshot shows the 'Traverse - Asset Relationships' web application in Internet Explorer. The page title is 'Asset Relationship Maintenance'. On the left is a navigation menu with links: HOME, TASKS, INTERFACE, REPORTS, and ADMIN (highlighted). The ADMIN menu includes: Change Password, Asset Types, Asset Relationships, Category Codes, Class Codes, Departments, Sites, Buildings, Location Types, Locations, Manufacturers, Status Codes, and System Configuration. Below the menu is a 'SECURITY' section with a 'Logout' button. The main content area shows the configuration for 'Type ID: BOX' with 'Description: Storage Box'. It contains two tables: 'Storage Box can be contained by:' and 'Storage Box can contain:'. Both tables have columns for 'Item Type' and 'Description'. In the 'can be contained by' table, 'BOX' (Storage Box) and 'OS' (Gusset (Pendeflex File Folder)) are checked. In the 'can contain' table, 'BOX' (Storage Box) and 'OS' (Gusset (Pendeflex File Folder)) are checked. At the bottom are buttons: Find, Clear, Save, Delete, and Print. The footer shows '© 2009 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved' and 'Local intranet'.

Item Type	Description
<input checked="" type="checkbox"/> BOX	Storage Box
<input type="checkbox"/> FC	File Cabinet
<input type="checkbox"/> OS	Gusset (Pendeflex File Folder)

Item Type	Description
<input checked="" type="checkbox"/> BOX	Storage Box
<input type="checkbox"/> FF	File Folder
<input checked="" type="checkbox"/> OS	Gusset (Pendeflex File Folder)

The screenshot shows the 'Traverse - Asset Relationships' web application in Internet Explorer. The page title is 'Asset Relationship Maintenance'. On the left is a navigation menu with links: HOME, TASKS, INTERFACE, REPORTS, and ADMIN (highlighted). The ADMIN menu includes: Change Password, Asset Types, Asset Relationships, Category Codes, Class Codes, Departments, Sites, Buildings, Location Types, Locations, Manufacturers, Status Codes, and System Configuration. Below the menu is a 'SECURITY' section with a 'Logout' button. The main content area shows the configuration for 'Type ID: OS' with 'Description: Gusset (Pendeflex File Folder)'. It contains two tables: 'Gusset (Pendeflex File Folder) can be contained by:' and 'Gusset (Pendeflex File Folder) can contain:'. Both tables have columns for 'Item Type' and 'Description'. In the 'can be contained by' table, 'BOX' (Storage Box), 'FC' (File Cabinet), and 'OS' (Gusset (Pendeflex File Folder)) are checked. In the 'can contain' table, 'FF' (File Folder) and 'OS' (Gusset (Pendeflex File Folder)) are checked. At the bottom are buttons: Find, Clear, Save, Delete, and Print. The footer shows '© 2009 - Copyright - Practical Compliance Solutions, Corp. - All rights reserved' and 'Local intranet'.

Item Type	Description
<input checked="" type="checkbox"/> BOX	Storage Box
<input checked="" type="checkbox"/> FC	File Cabinet
<input type="checkbox"/> OS	Gusset (Pendeflex File Folder)

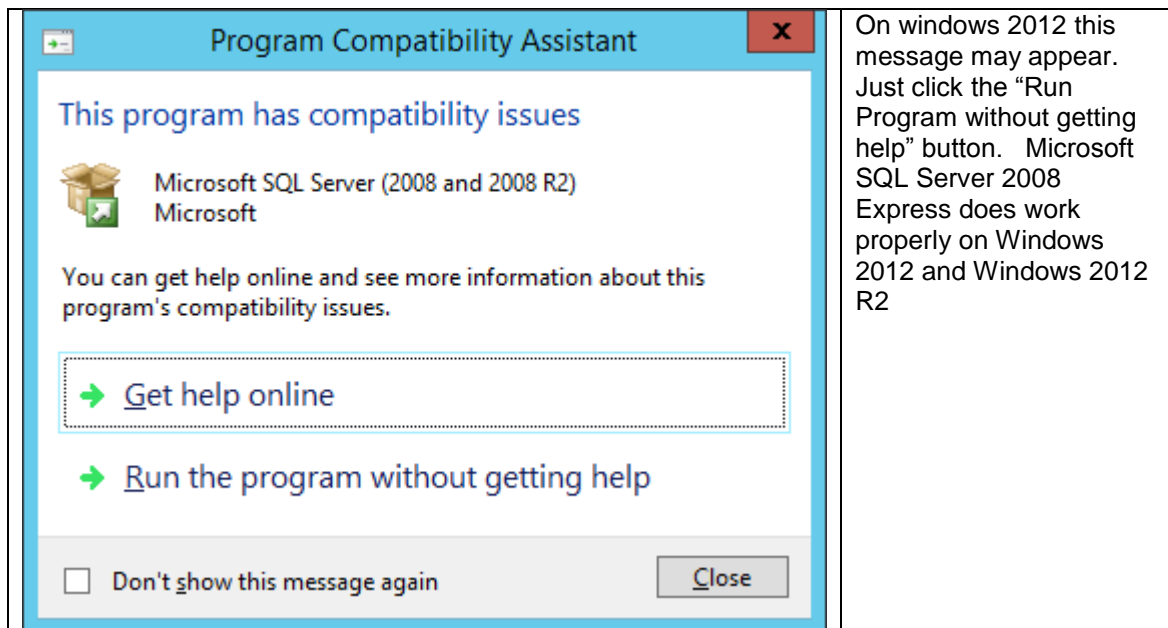
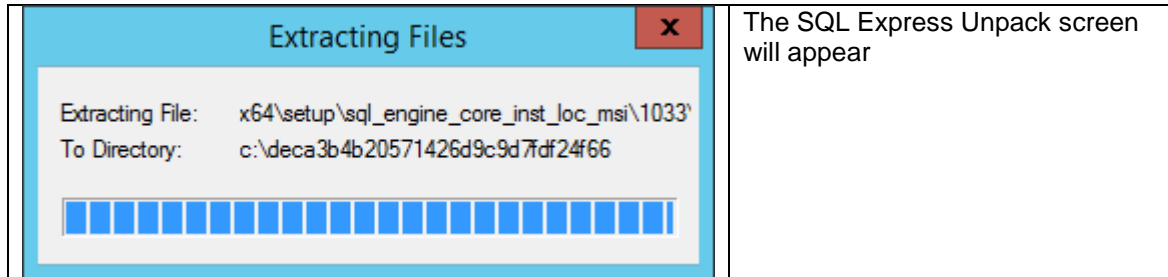
Item Type	Description
<input type="checkbox"/> BOX	Storage Box
<input checked="" type="checkbox"/> FF	File Folder
<input type="checkbox"/> OS	Gusset (Pendeflex File Folder)



← Traverse →™ Installation Guide

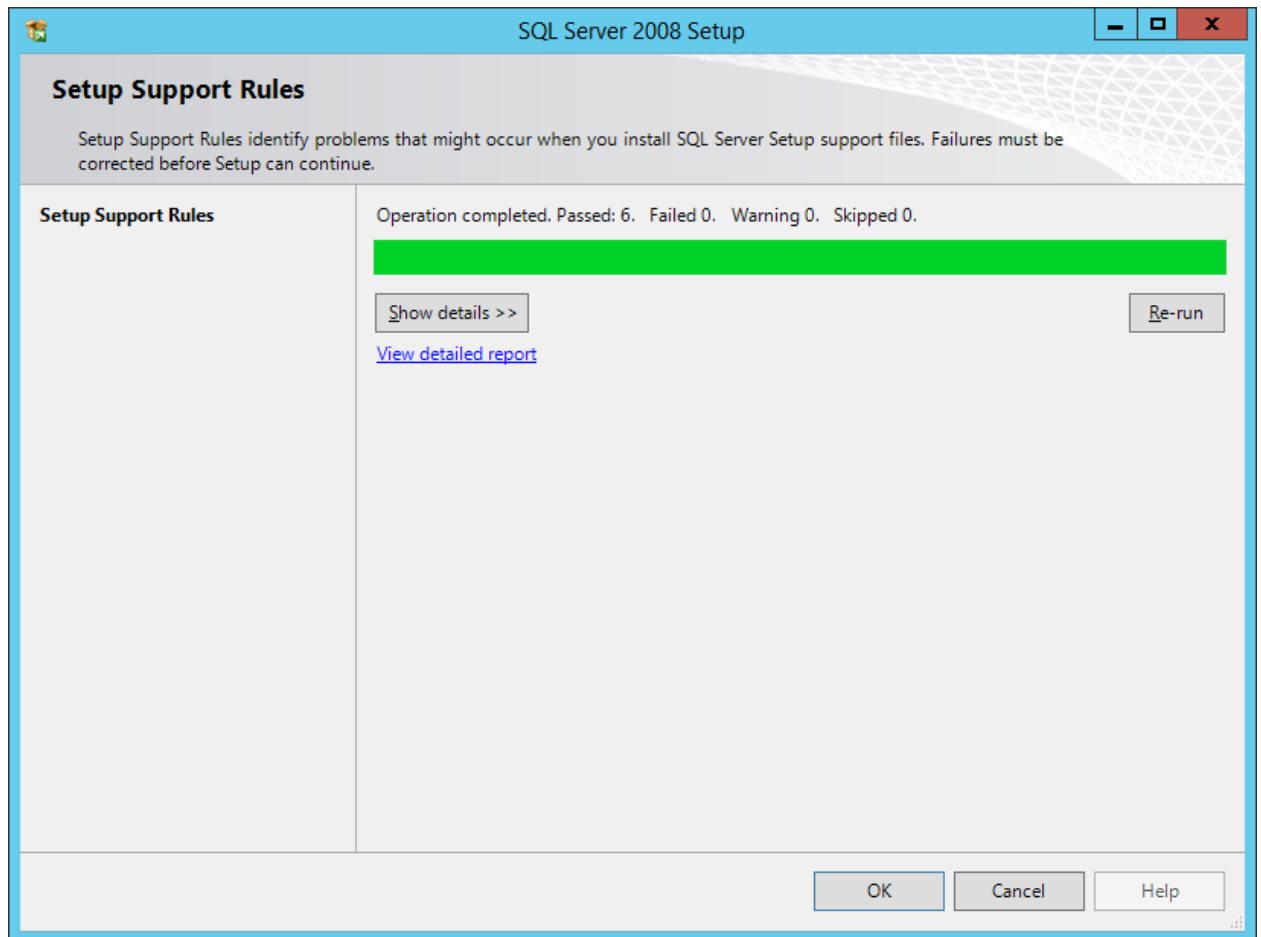
5. Installing Traverse with SQL Express

SQL Express is Microsoft's free version of SQL Server.

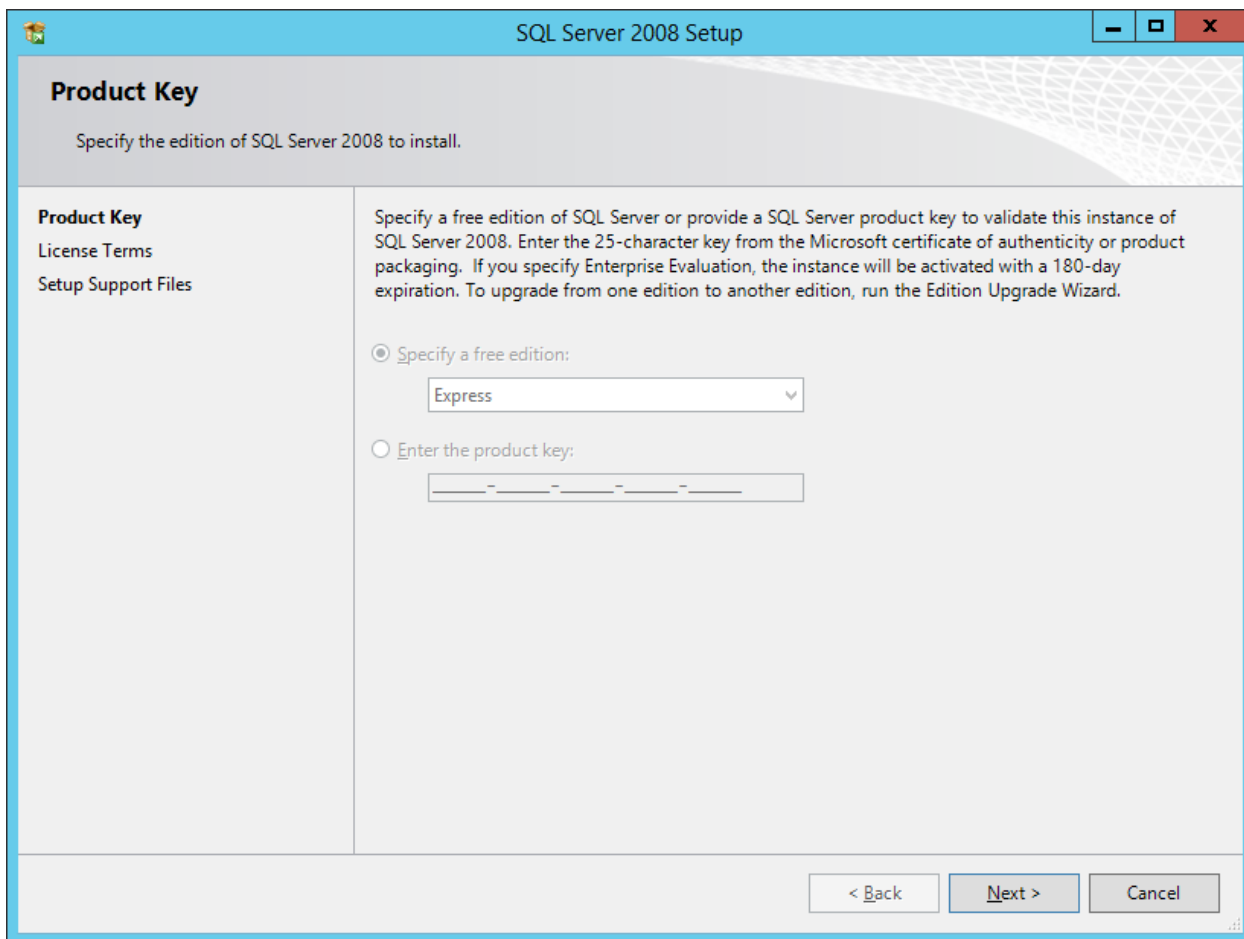


Follow the prompts for installing SQL Express

← Traverse →™ Installation Guide



← Traverse →™ Installation Guide



The screenshot shows the 'SQL Server 2008 Setup' window. The title bar includes standard Windows window controls (minimize, maximize, close). The main window has a header area with the title 'Product Key' and a subtitle 'Specify the edition of SQL Server 2008 to install.' Below this is a sidebar with three links: 'Product Key' (selected), 'License Terms', and 'Setup Support Files'. The main content area contains a paragraph of instructions: 'Specify a free edition of SQL Server or provide a SQL Server product key to validate this instance of SQL Server 2008. Enter the 25-character key from the Microsoft certificate of authenticity or product packaging. If you specify Enterprise Evaluation, the instance will be activated with a 180-day expiration. To upgrade from one edition to another edition, run the Edition Upgrade Wizard.' There are two radio buttons: 'Specify a free edition:' (selected) and 'Enter the product key:'. The first option has a dropdown menu showing 'Express'. The second option has a text input field with a 25-character placeholder. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

SQL Server 2008 Setup

Product Key

Specify the edition of SQL Server 2008 to install.

Product Key
License Terms
Setup Support Files

Specify a free edition of SQL Server or provide a SQL Server product key to validate this instance of SQL Server 2008. Enter the 25-character key from the Microsoft certificate of authenticity or product packaging. If you specify Enterprise Evaluation, the instance will be activated with a 180-day expiration. To upgrade from one edition to another edition, run the Edition Upgrade Wizard.

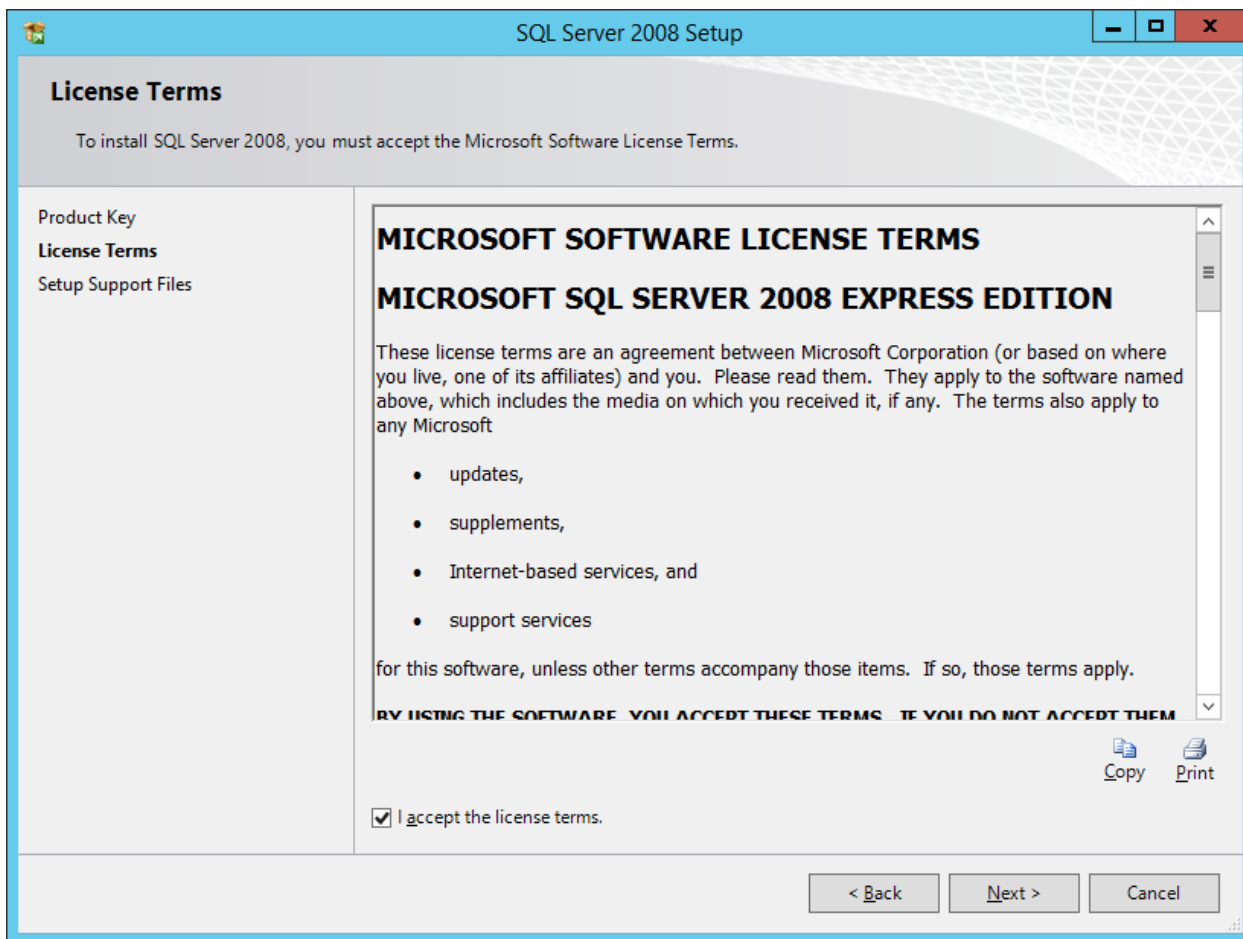
☒ Specify a free edition:
Express

☐ Enter the product key:

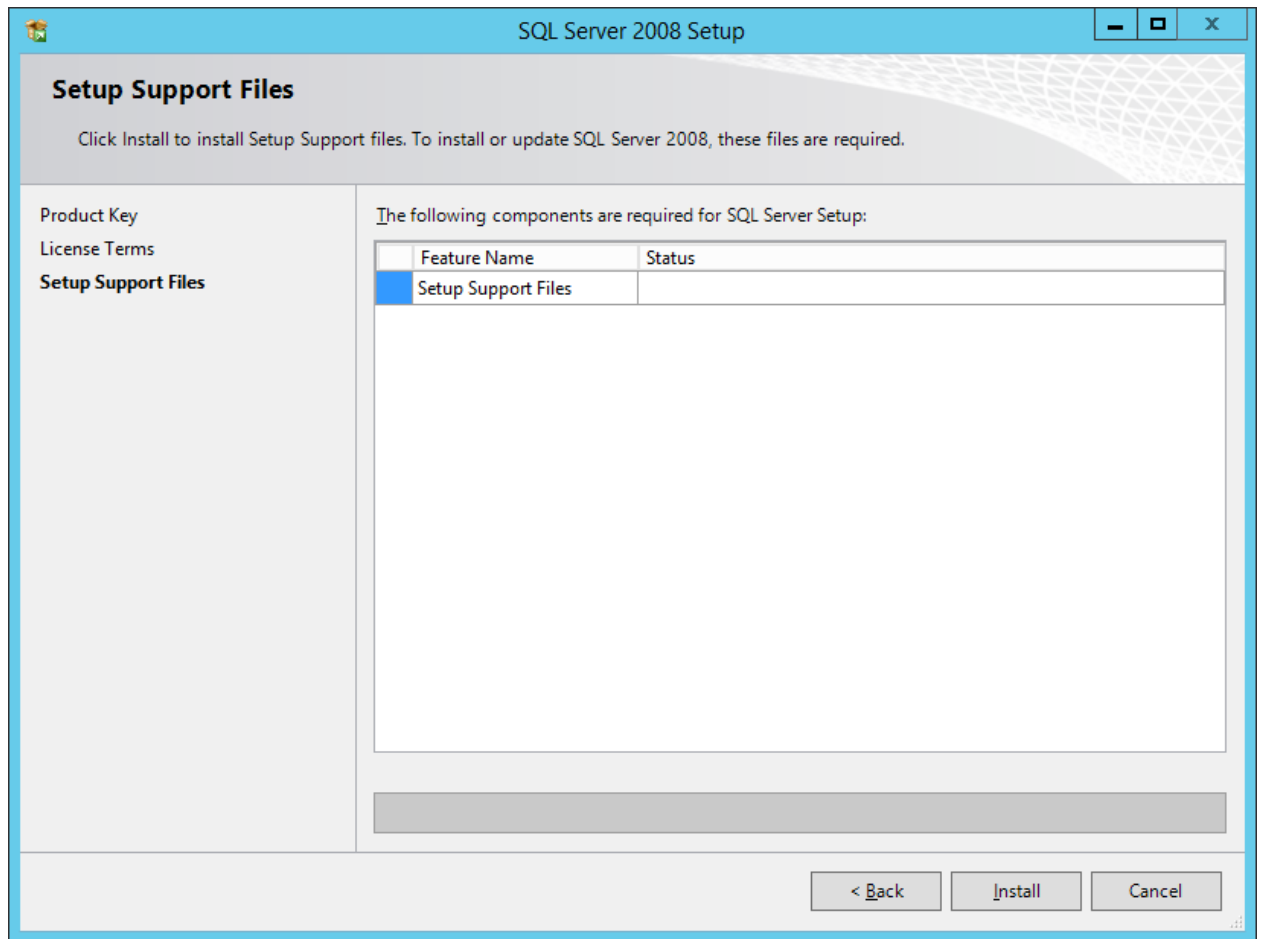
< Back Next > Cancel



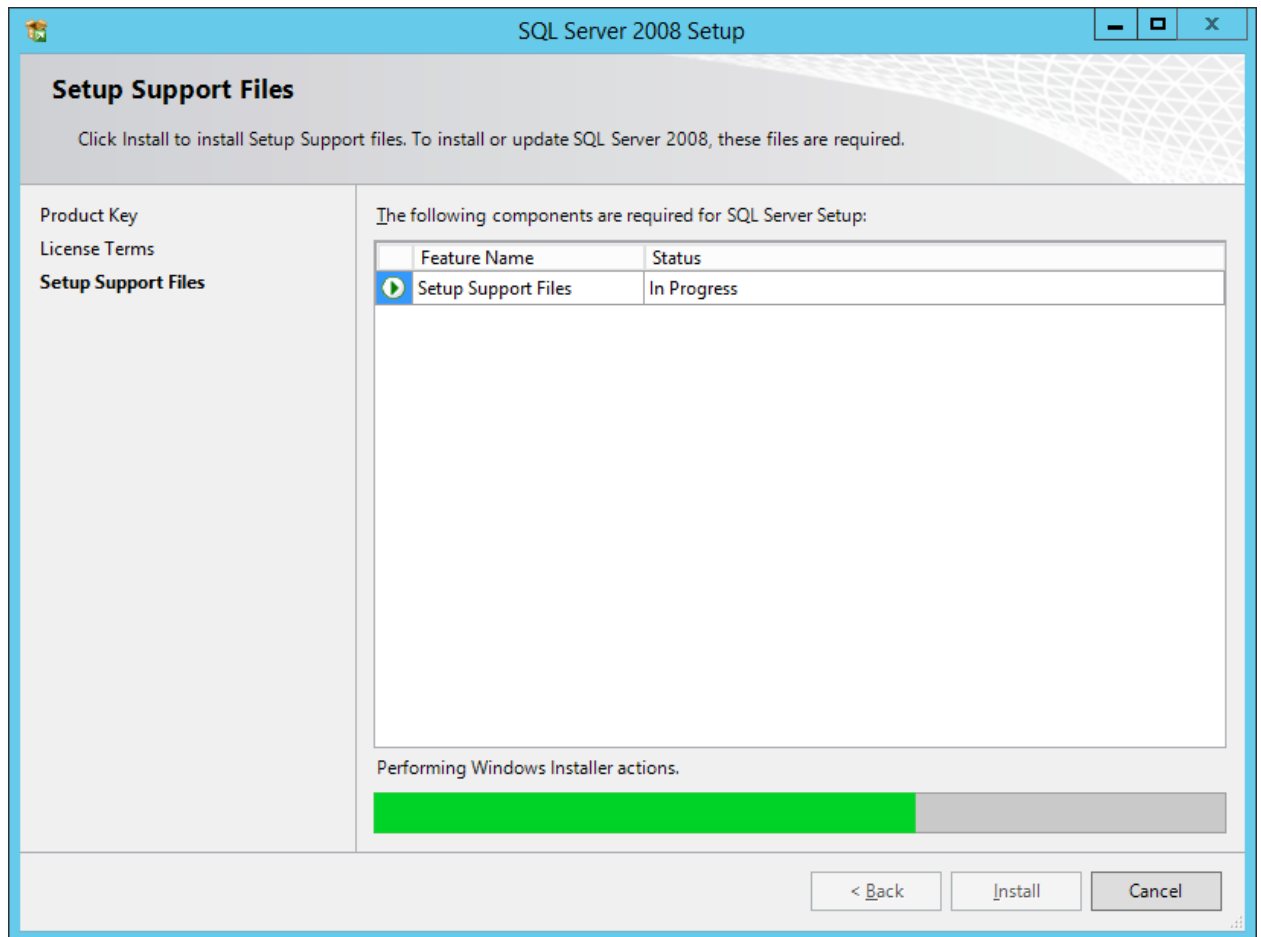
← Traverse →™ Installation Guide



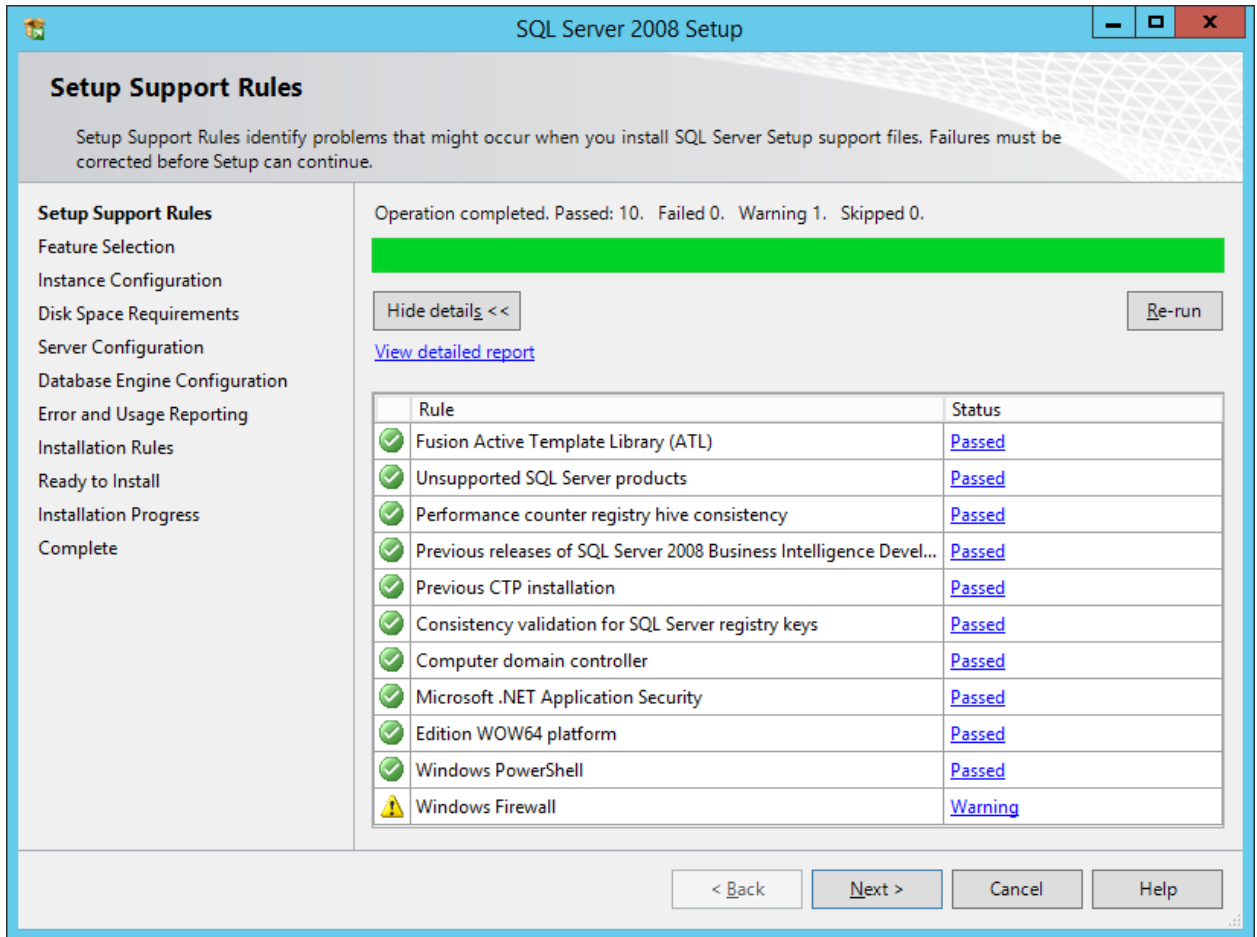
← Traverse →™ Installation Guide



← Traverse →™ Installation Guide



← Traverse →™ Installation Guide



The Traverse installer will adjust the Windows Firewall allowing TCP Port 1433 and UDP 1434 for pass-through.

Traverse does not use SQL Replication. Please select the checkboxes as pictured below



← Traverse →™ Installation Guide

SQL Server 2008 Setup

Feature Selection

Select the Express features to install. For clustered installations, only Database Engine Services and Analysis Services can be clustered.

Features:	Description:
Instance Features <ul style="list-style-type: none"><input checked="" type="checkbox"/> Database Engine Services<input type="checkbox"/> SQL Server Replication	Server features are instance-aware and have their own registry hives. They support multiple instances on a computer.
Shared Features <ul style="list-style-type: none"><input checked="" type="checkbox"/> SQL Client Connectivity SDK	
Redistributable Features	

Select All Unselect All

Shared feature directory: C:\Program Files\Microsoft SQL Server\ ...

Shared feature directory (x86): C:\Program Files (x86)\Microsoft SQL Server\ ...

< Back Next > Cancel Help

Leave the Named instance as it is pictured below.

← Traverse →™ Installation Guide

SQL Server 2008 Setup

Instance Configuration

Specify the name and instance ID for the SQL Server instance.

Setup Support Rules
Feature Selection
Instance Configuration
Disk Space Requirements
Server Configuration
Database Engine Configuration
Error and Usage Reporting
Installation Rules
Ready to Install
Installation Progress
Complete

☐ Default instance

☒ Named instance: TRAVERSESQ

Instance ID: TRAVERSESQ

Instance root directory: C:\Program Files\Microsoft SQL Server\ ...

SQL Server directory: C:\Program Files\Microsoft SQL Server\MSSQL10.TRAVERSESQ

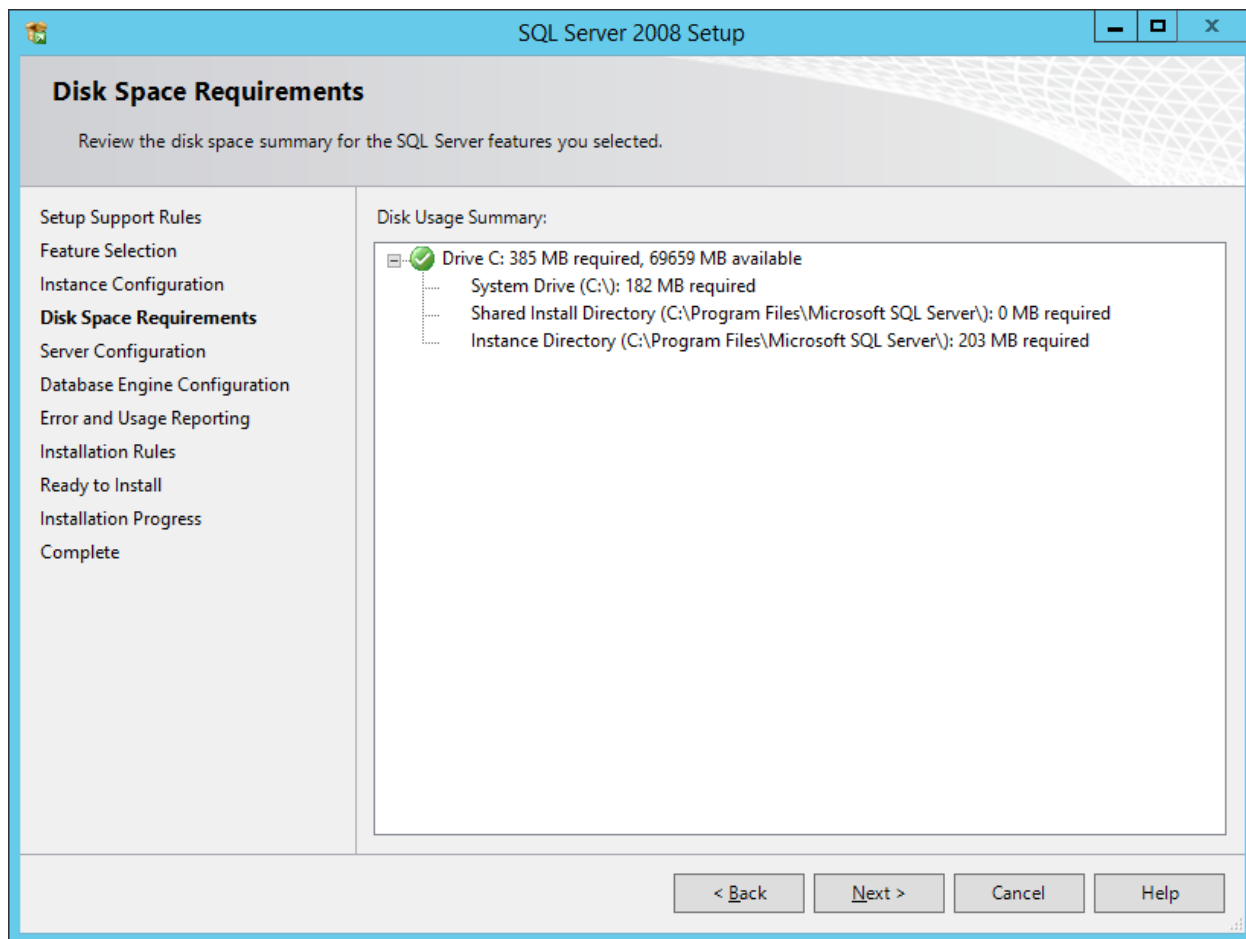
Installed instances:

Instance	Features	Edition	Version	Instance ID
----------	----------	---------	---------	-------------

< Back Next > Cancel Help



← Traverse →™ Installation Guide



← Traverse →™ Installation Guide

SQL Server 2008 Setup

Server Configuration
Specify the configuration.

Setup Support Rules
Feature Selection
Instance Configuration
Disk Space Requirements
Server Configuration
Database Engine Configuration
Error and Usage Reporting
Installation Rules
Ready to Install
Installation Progress
Complete

Service Accounts | Collation

Microsoft recommends that you use a separate account for each SQL Server service.

Service	Account Name	Password	Startup Type
SQL Server Database Engine	NT AUTHORITY\SYSTEM		Automatic

[Use the same account for all SQL Server services](#)

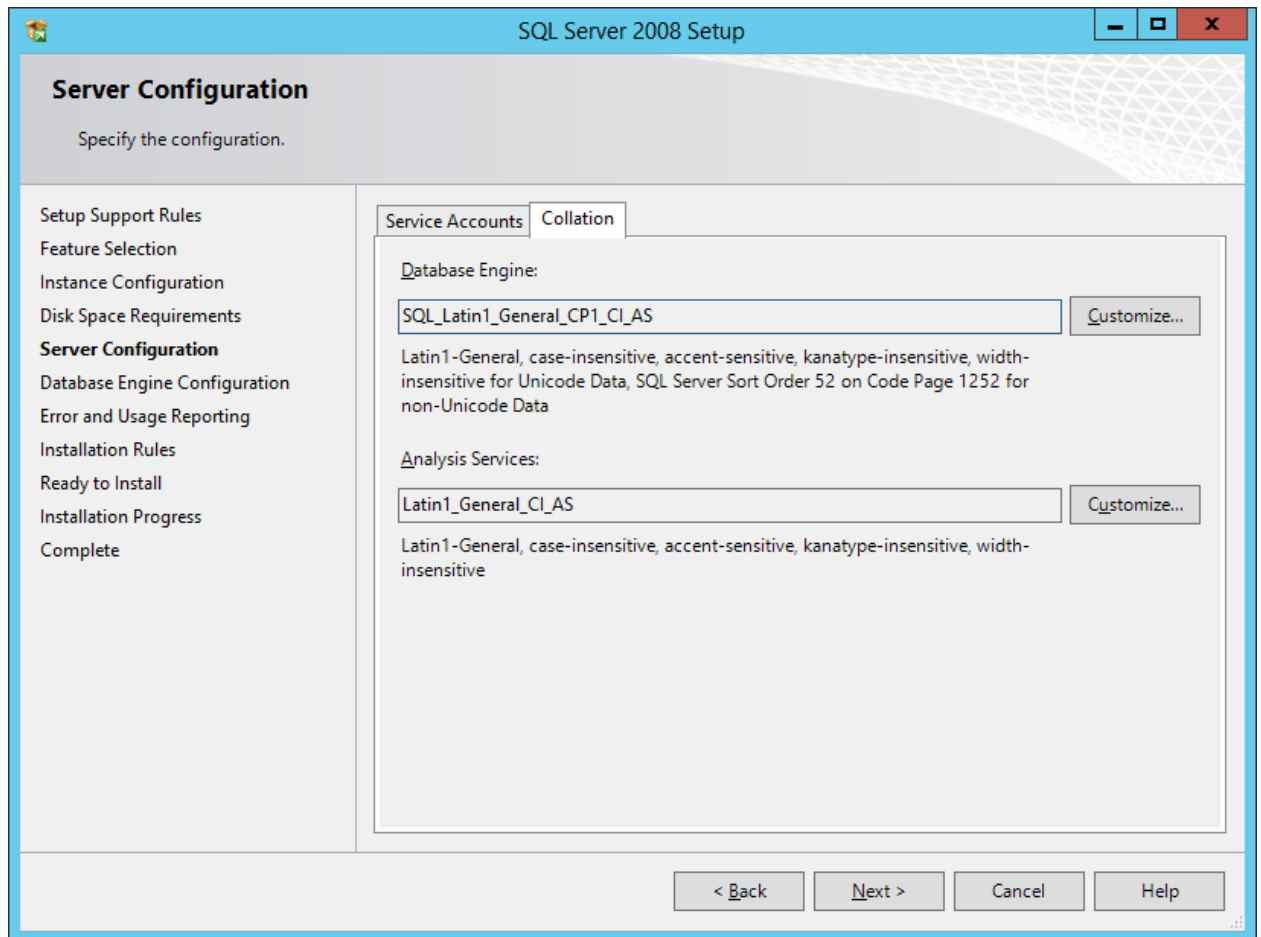
These services will be configured automatically where possible to use a low privilege account. On some older Windows versions the user will need to specify a low privilege account. For more information, click Help.

Service	Account Name	Password	Startup Type
SQL Server Browser	NT AUTHORITY\LOCA...		Automatic

< Back Next > Cancel Help

Traverse depends on a "Case Insensitive" database, which means that capital "A" and Lower case "a" are the same character. The Collation below is case insensitive, please do not change it.

← Traverse →™ Installation Guide



Click the “Add Current User button”



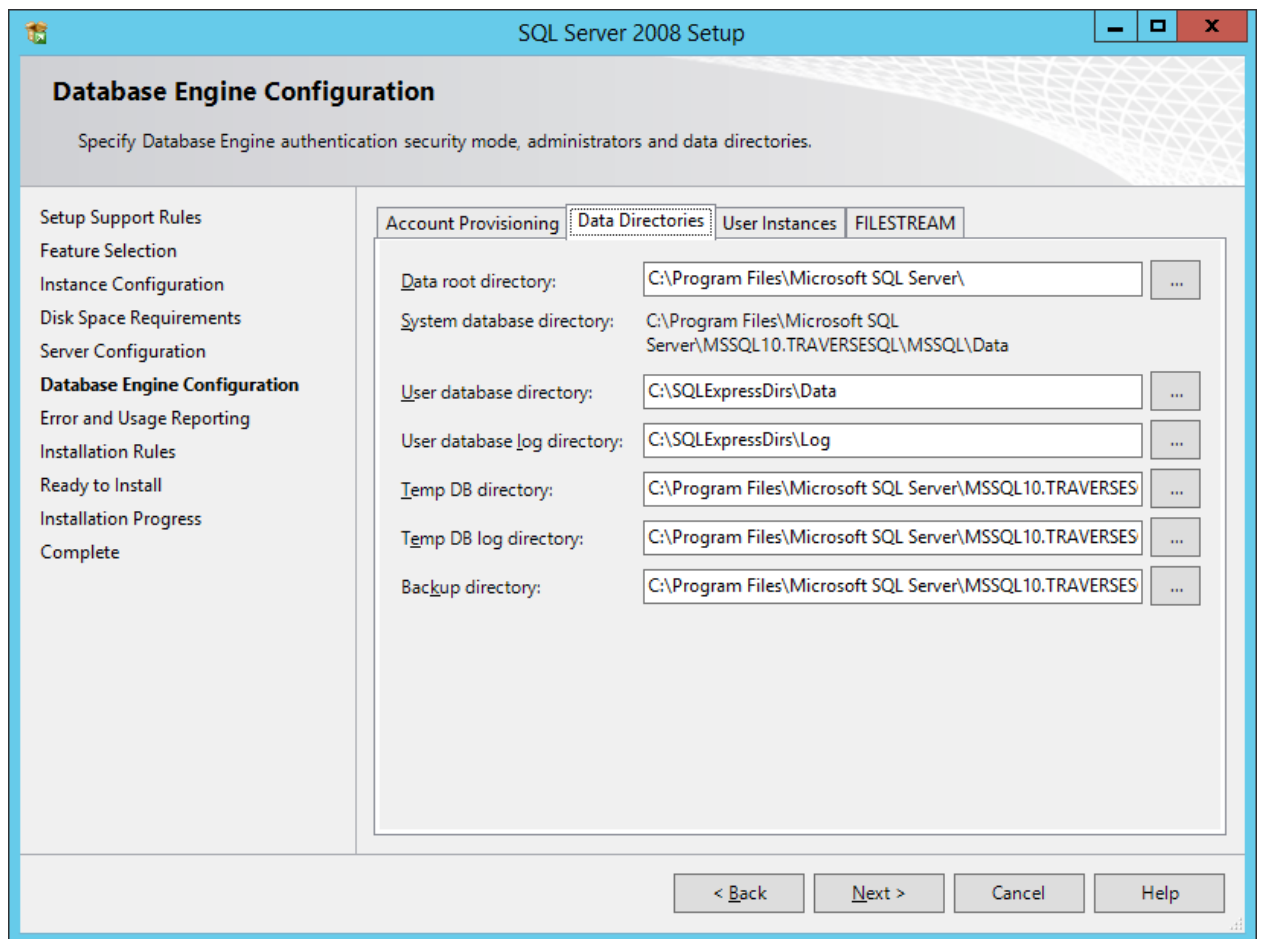
← Traverse →™ Installation Guide

The screenshot shows the 'SQL Server 2008 Setup' window, specifically the 'Database Engine Configuration' step. The left sidebar lists various setup options, with 'Database Engine Configuration' highlighted. The main area is divided into tabs: 'Account Provisioning' (selected), 'Data Directories', 'User Instances', and 'FILESTREAM'. Under 'Account Provisioning', the instruction is to 'Specify the authentication mode and administrators for the Database Engine.' The 'Authentication Mode' section has two radio buttons: 'Windows authentication mode' and 'Mixed Mode (SQL Server authentication and Windows authentication)', with 'Mixed Mode' selected. Below this, there are fields for 'Built-in SQL Server system administrator account', 'Enter password:', and 'Confirm password:', all containing masked text. The 'Specify SQL Server administrators' section features a list box with 'ADMINISTRATORS' selected. To the right of the list box is a note: 'SQL Server administrators have unrestricted access to the Database Engine.' At the bottom of the list box are three buttons: 'Add Current User', 'Add...', and 'Remove'. The bottom of the window has four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

It is best to leave these directories as they are unless you have access to high capacity, high throughput storage.

Click the “Add Current User button”

← Traverse →™ Installation Guide



SQL Server 2008 Setup

Database Engine Configuration

Specify Database Engine authentication security mode, administrators and data directories.

Setup Support Rules
Feature Selection
Instance Configuration
Disk Space Requirements
Server Configuration
Database Engine Configuration
Error and Usage Reporting
Installation Rules
Ready to Install
Installation Progress
Complete

Account Provisioning | **Data Directories** | User Instances | FILESTREAM

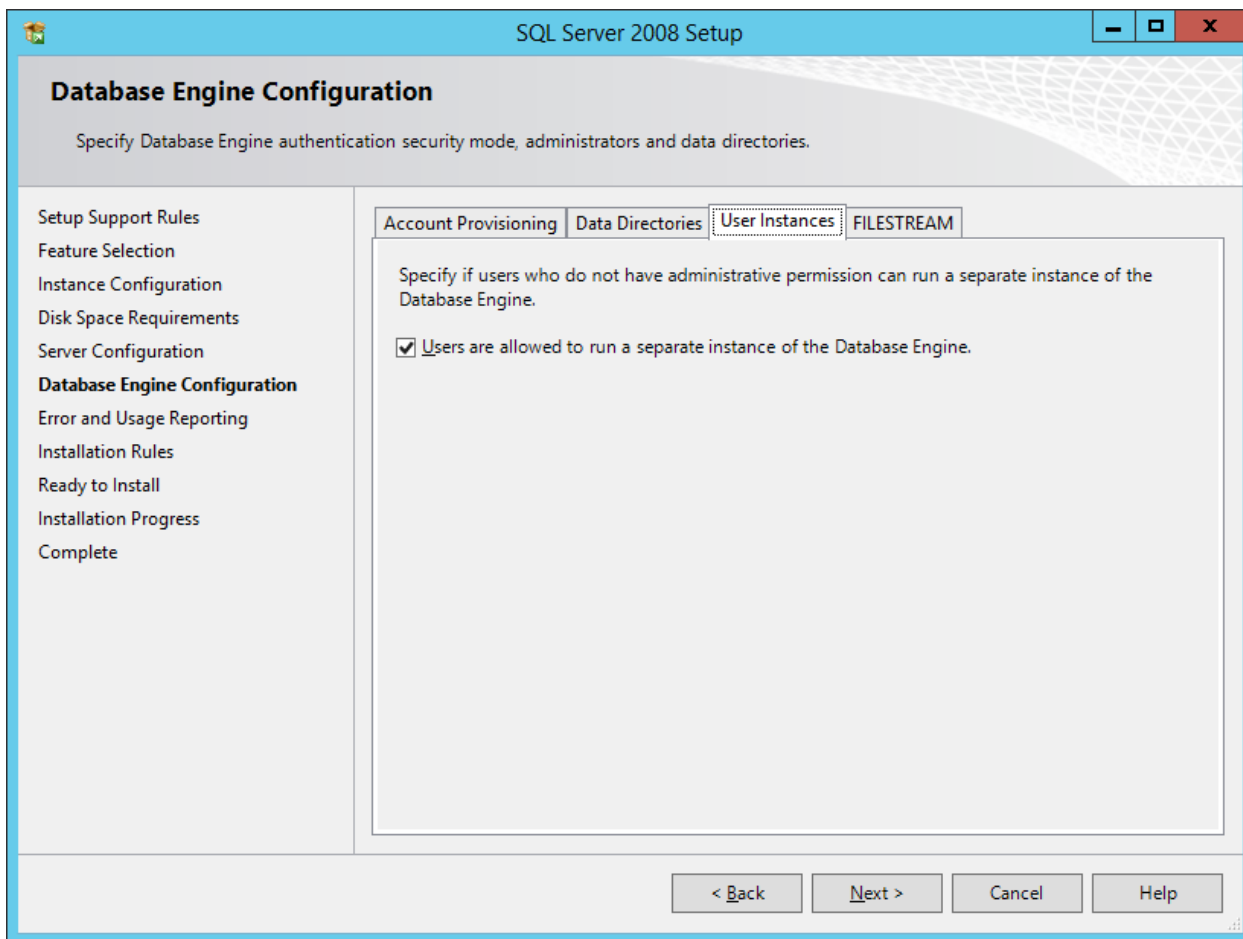
Data root directory:	C:\Program Files\Microsoft SQL Server\	...
System database directory:	C:\Program Files\Microsoft SQL Server\MSSQL10.TRAVERSESQ\MSSQL\Data	
User database directory:	C:\SQLExpressDirs\Data	...
User database log directory:	C:\SQLExpressDirs\Log	...
Temp DB directory:	C:\Program Files\Microsoft SQL Server\MSSQL10.TRAVERSES	...
Temp DB log directory:	C:\Program Files\Microsoft SQL Server\MSSQL10.TRAVERSES	...
Backup directory:	C:\Program Files\Microsoft SQL Server\MSSQL10.TRAVERSES	...

< Back Next > Cancel Help

It is also best to leave this value as is



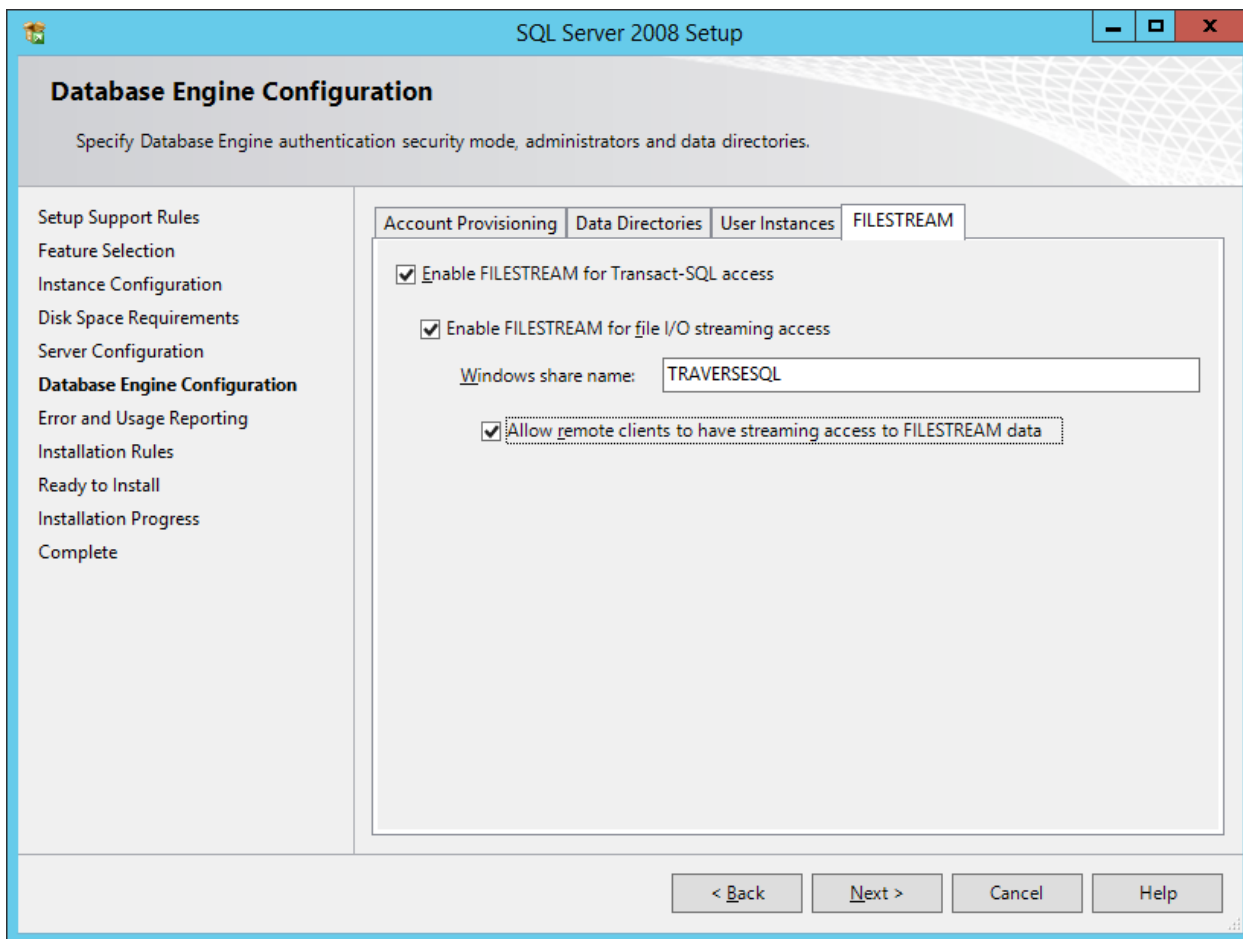
← Traverse →™ Installation Guide



If you will be storing pictures of your assets in Traverse, it is best to turn on the SQL File Stream as pictured below.



← Traverse →™ Installation Guide



The screenshot shows the 'SQL Server 2008 Setup' window, specifically the 'Database Engine Configuration' step. The window has a blue title bar and a sidebar on the left with a list of installation steps. The main area is titled 'Database Engine Configuration' and contains a sub-header 'Specify Database Engine authentication security mode, administrators and data directories.' Below this, there are four tabs: 'Account Provisioning', 'Data Directories', 'User Instances', and 'FILESTREAM'. The 'FILESTREAM' tab is selected. Inside this tab, there are three checkboxes: 'Enable FILESTREAM for Transact-SQL access' (checked), 'Enable FILESTREAM for file I/O streaming access' (checked), and 'Allow remote clients to have streaming access to FILESTREAM data' (checked). A text box labeled 'Windows share name:' contains the text 'TRAVERSESQ'. At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

SQL Server 2008 Setup

Database Engine Configuration

Specify Database Engine authentication security mode, administrators and data directories.

Setup Support Rules
Feature Selection
Instance Configuration
Disk Space Requirements
Server Configuration
Database Engine Configuration
Error and Usage Reporting
Installation Rules
Ready to Install
Installation Progress
Complete

Account Provisioning Data Directories User Instances **FILESTREAM**

☒ Enable FILESTREAM for Transact-SQL access

☒ Enable FILESTREAM for file I/O streaming access

Windows share name: TRAVERSESQ

☒ Allow remote clients to have streaming access to FILESTREAM data

< Back Next > Cancel Help



← Traverse →™ Installation Guide

SQL Server 2008 Setup

Error and Usage Reporting

Help Microsoft improve SQL Server features and services.

Setup Support Rules
Feature Selection
Instance Configuration
Disk Space Requirements
Server Configuration
Database Engine Configuration
Error and Usage Reporting
Installation Rules
Ready to Install
Installation Progress
Complete

Specify the information that you would like to automatically send to Microsoft to improve future releases of SQL Server. These settings are optional. Microsoft treats this information as confidential. Microsoft may provide updates through Microsoft Update to modify feature usage data. These updates might be downloaded and installed on your machine automatically, depending on your Automatic Update settings.

[View the Microsoft policy for SQL Server privacy and data collection.](#)

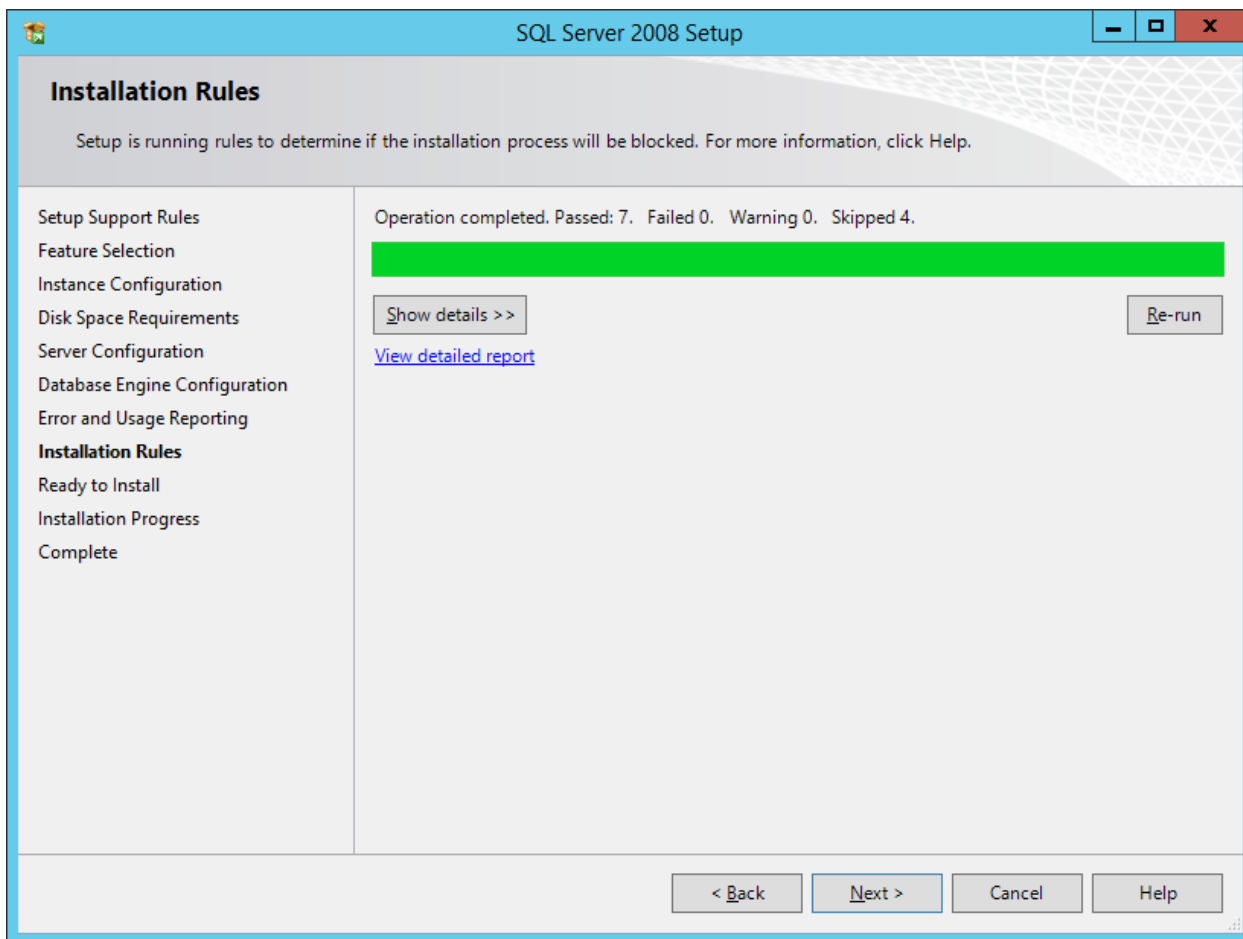
[Read more about Microsoft Update and Automatic Update.](#)

☐ Send Windows and SQL Server Error Reports to Microsoft or your corporate report server. This setting only applies to services that run without user interaction.

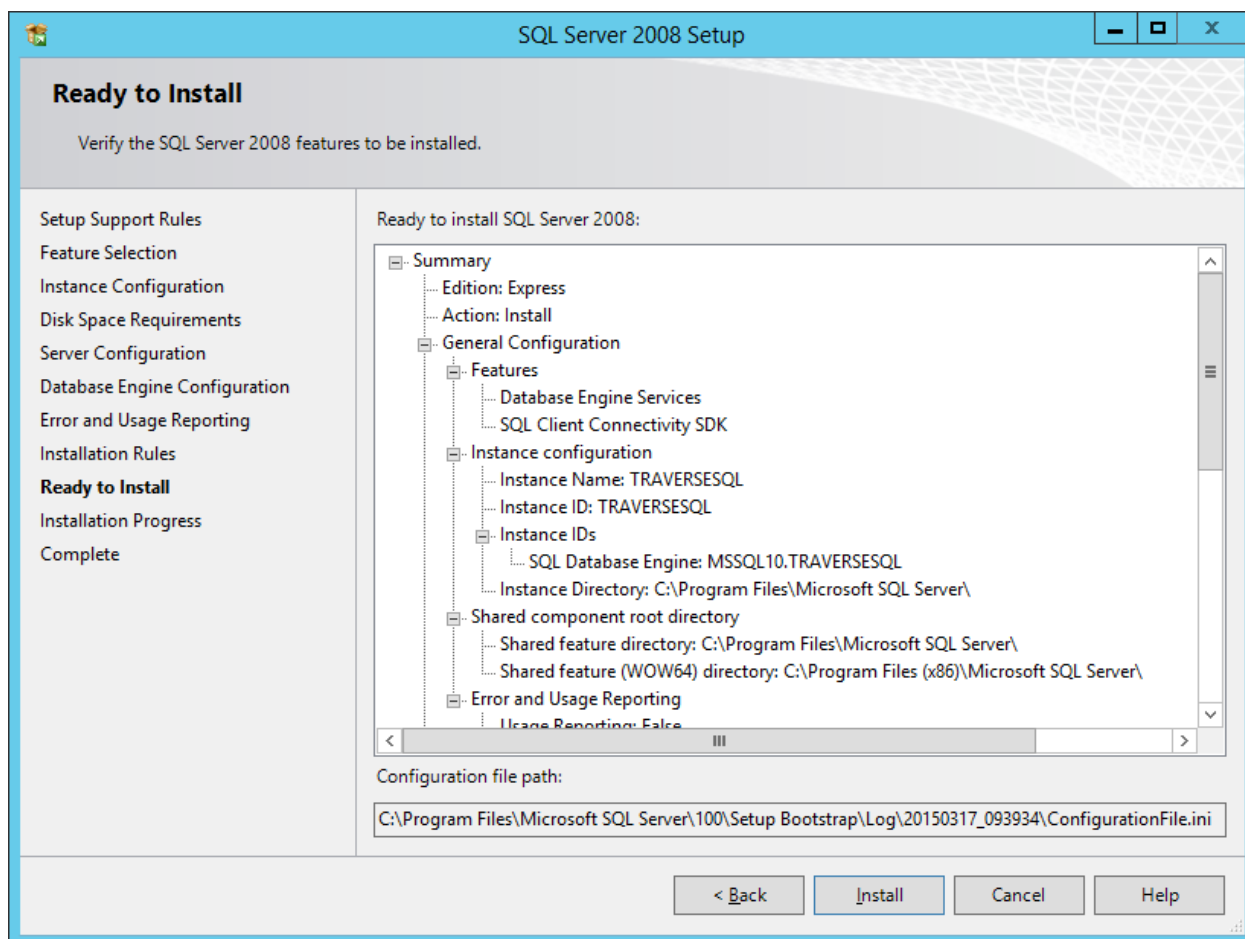
☐ Send feature usage data to Microsoft. Feature usage data includes information about your hardware configuration and how you use Microsoft software and services.

< Back Next > Cancel Help

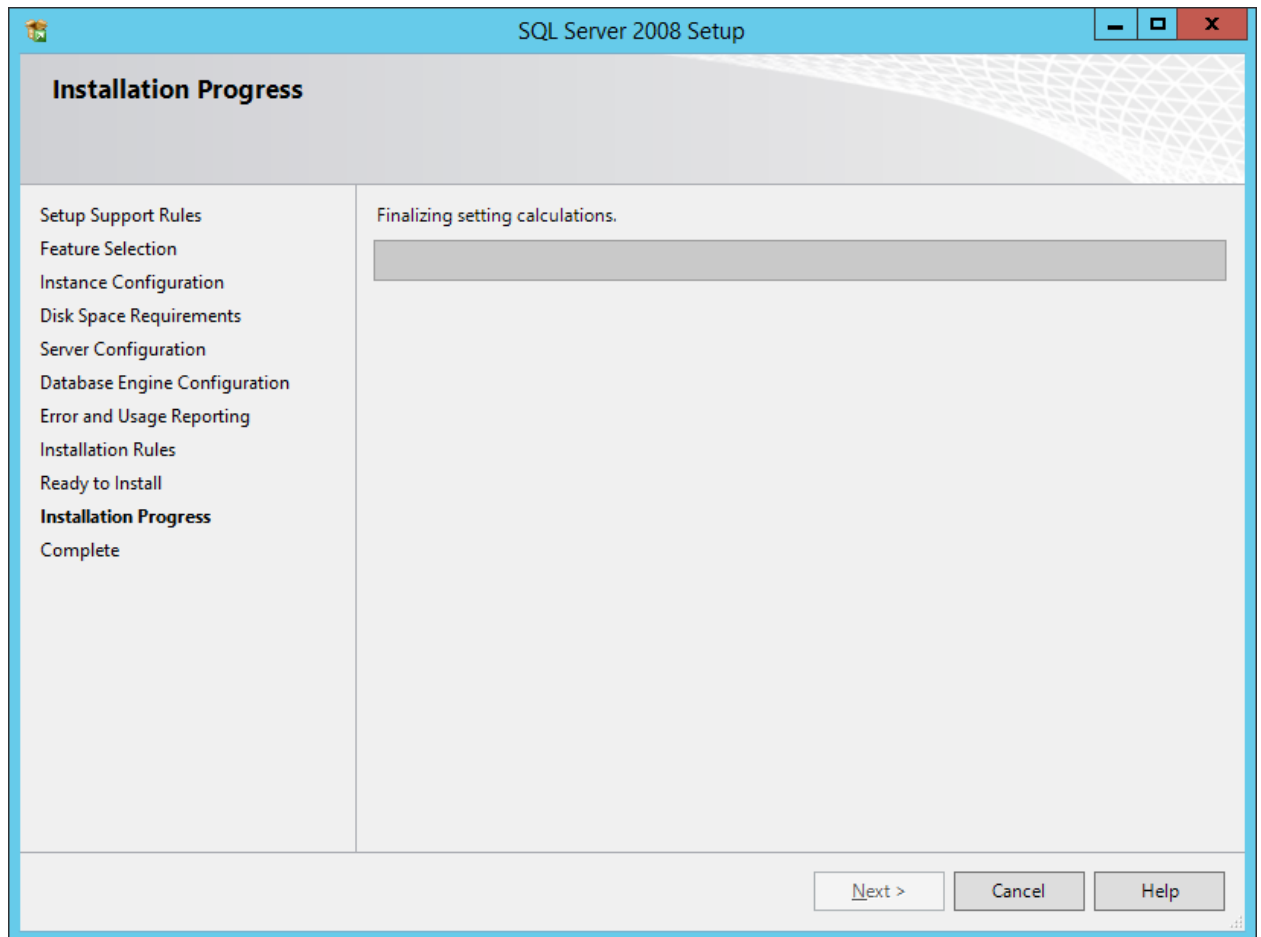
← Traverse →™ Installation Guide



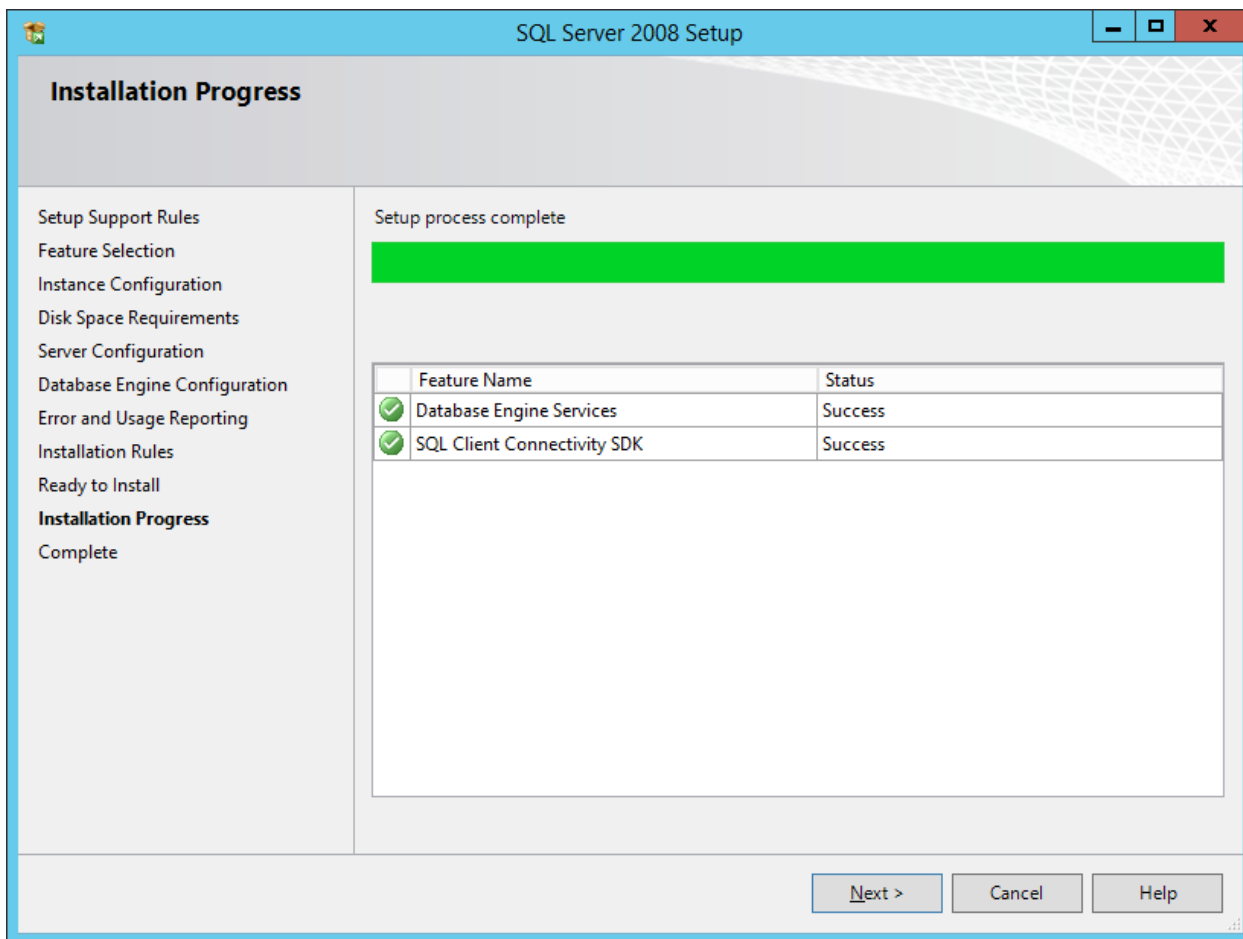
← Traverse →™ Installation Guide



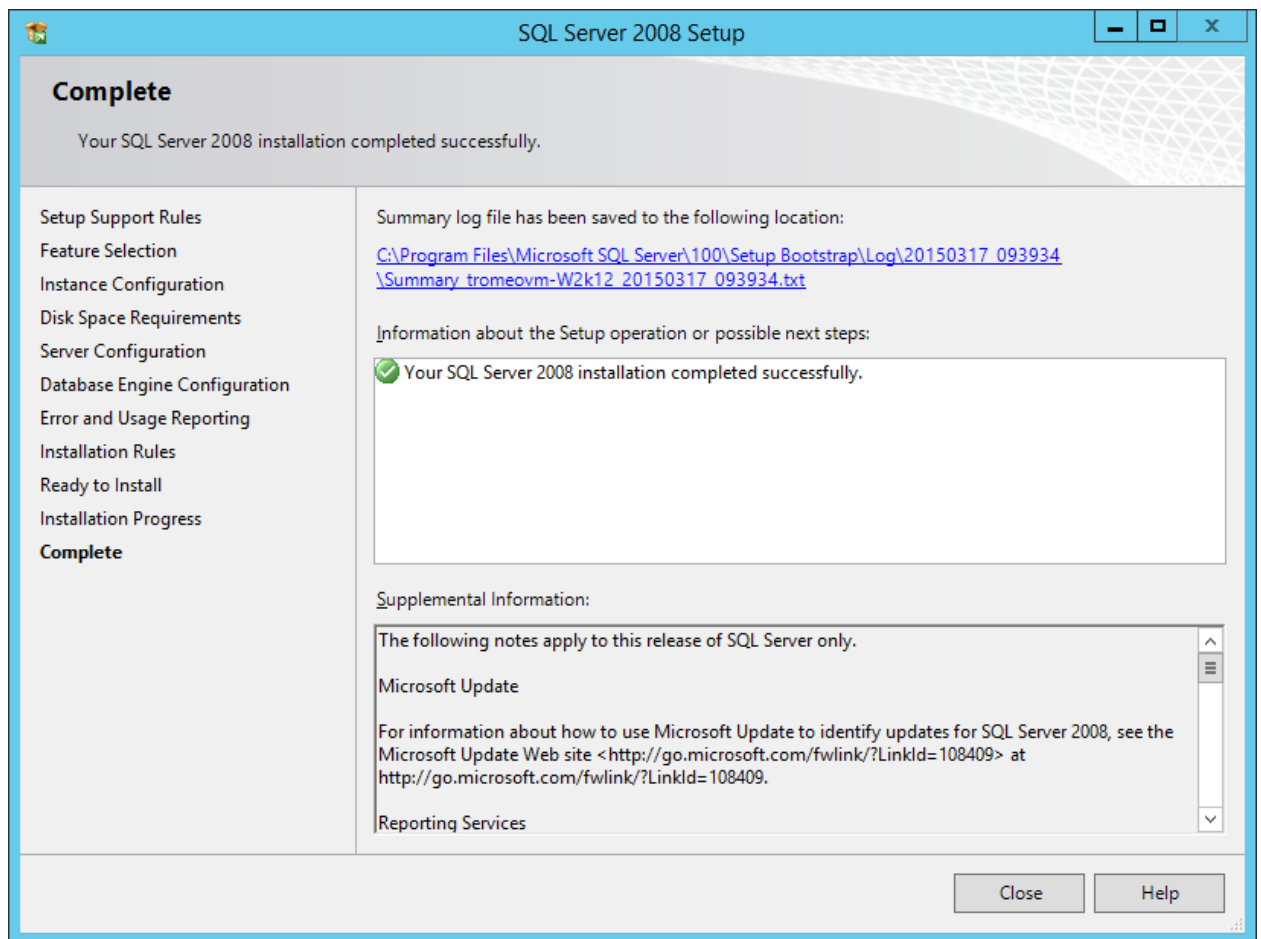
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← Traverse →™ Installation Guide



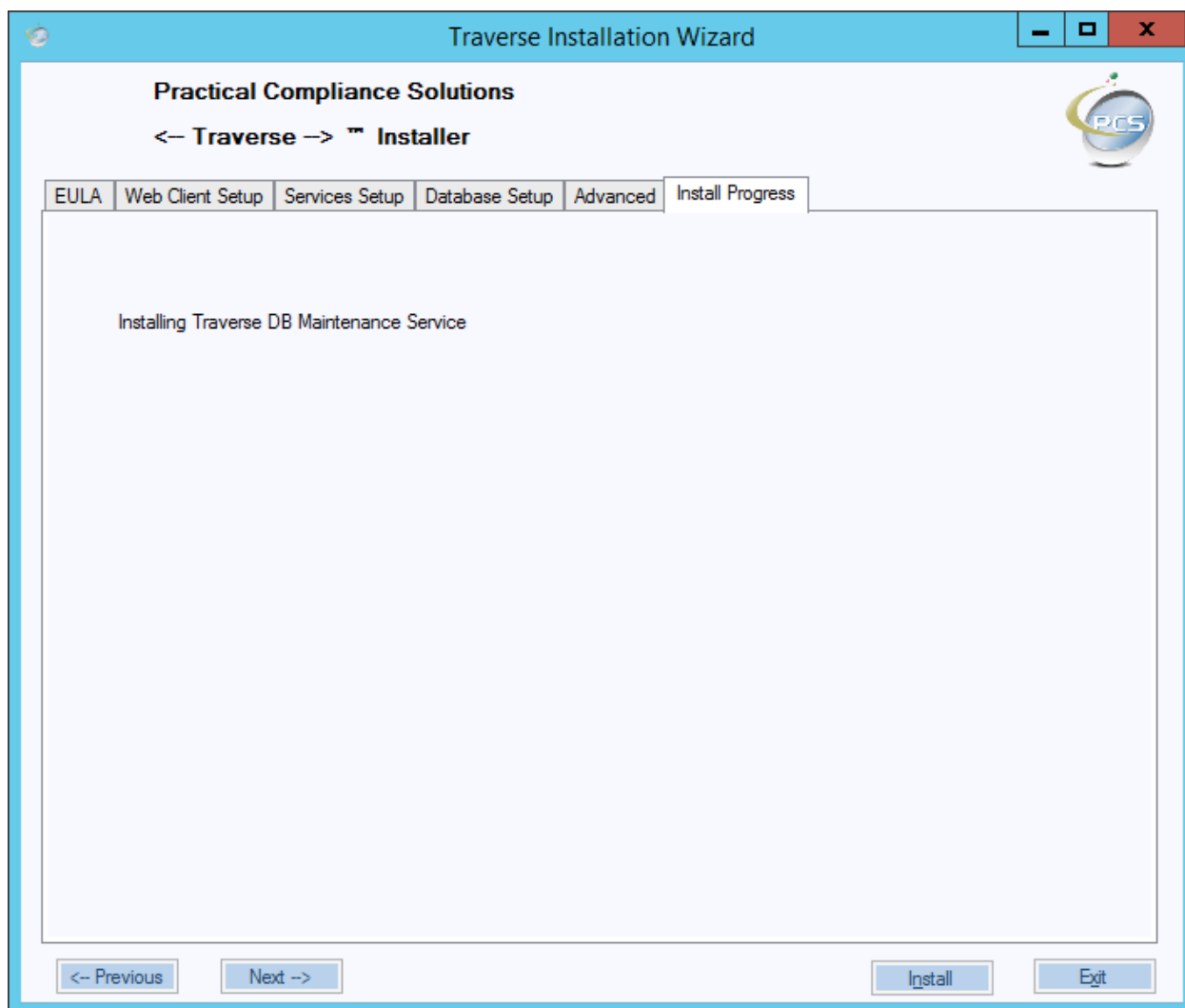
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Traverse will continue its installation after SQL Express is installed



← Traverse →™ Installation Guide



6. Installation Check List

- ☐ Install IIS (Internet Information Services)
- ☐ Install Dot Net Framework 3.5
- ☐ Company Name _____
 - Company Name is Case Sensitive
- ☐ Database Server Name _____
- ☐ Register the Dot Net Framework with IIS
- ☐ Log In as an administrator when installing Traverse
- ☐ Certify ample disk, CPU, and RAM per section 1.1 System Requirements



7. Index

