



## TIPWeb-IT with RFID (Mobile App for iOS and Android)

Release Notes – Version 1.10

Hayes Software Systems is happy to announce the release of TIPWeb-IT with RFID version 1.10 that includes the ability to issue and collect district assets using your iOS or Android device. These enhancements will help facilitate your check out / check in processes for a variety of scenarios.

Highlights include:

- Issue and collect standalone, parent, and component tags
- Issue and collect accessories associated with assets
- Decouple component assets from parent assets
- Email receipts during or after issuance and collections (e-Signatures via mobile are coming soon!)
- Update student, staff, or parent email records directly from the mobile app

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## ISSUANCE - USER ROLE SETTINGS

User Role Settings

**Site Admin**

- Restrict Bulk Room To Room Transfers
- Restrict from Adding Students from Other Sites when Issuing to Students
- Restrict from Associating Tags to Purchase Orders
- Restrict from Creating New Room Audits
- Restrict from Editing Products on a District Purchase Order
- Restrict from Initiating and Receiving Tags when Issuing to Staff/Students
- Restrict from Quick Collecting Another Site's Assets
- Restrict from Reconciling District Initiated Audits
- Restrict from Reconciling Site Initiated Audits
- Restrict Quick Transfers of Inventory when Deactivating Staff [?](#)

**Site User**

- Restrict from Adding Students from Other Sites when Issuing to Students
- Restrict from Creating New Room Audits
- Restrict from Initiating and Receiving Tags when Issuing to Staff/Students
- Restrict from Quick Collecting Another Site's Assets
- Restrict Shipping of Initiated Inventory Transfers

The ability to issue to staff/student is based on user role settings in TIPWeb-IT. The mobile app will inherit user role settings from the web app.

### USER ROLE SETTINGS NOT REQUIRED

- Admin admin/users can issue devices from any site to any site (no user role setting necessary).
- Site admin/users can issue devices from their site to staff/students of the same site (no user role settings necessary).
- Site admin/users can issue devices from their site to **staff** from other sites (no user role setting necessary). NOTE: assigning a device from Site A to staff at Site B creates a staff record at Site A. The issuer is prompted before issuance occurs to add the user record to Site A.

### USER ROLE SETTINGS REQUIRED

- Site admin/users can issue devices from their site to **students** from other sites (with restriction disabled).
  - District Settings > User Roles Settings > Restrict from Adding Students from Other Sites when Issuing to Students = OFF. NOTE: assigning a device from Site A to a student at Site B creates a student record at Site A. The issuer is prompted before issuance occurs to add the user record to Site A.
- Site admin/users can issue devices from other sites to staff/students from their site (with restriction disabled).
  - District Settings > User Roles Settings > Restrict from Initiated and Receive Tags when Issuing to Staff/Students set to OFF.

## ISSUANCE - ISSUING ASSETS

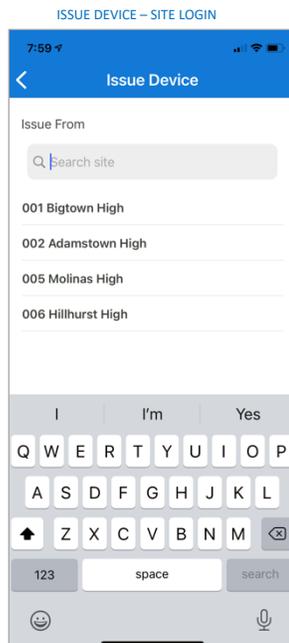
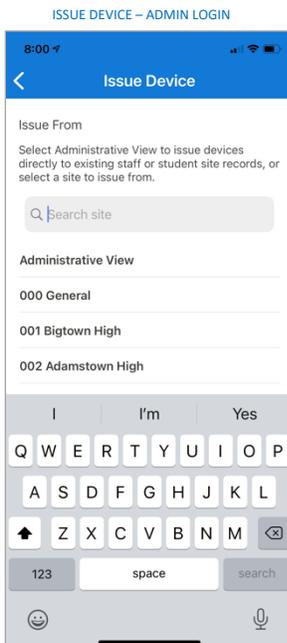
From the home screen, select **Issue Devices**.



Issue devices (or tags) is a 2-step process:

- STEP 1 – set Site to issue from and select Student or Staff.
- STEP 2 – enter or scan staff/student name or ID, enter a due date (optional), enter or scan tag or serial number

### STEP 1 – Select the site to issue from.



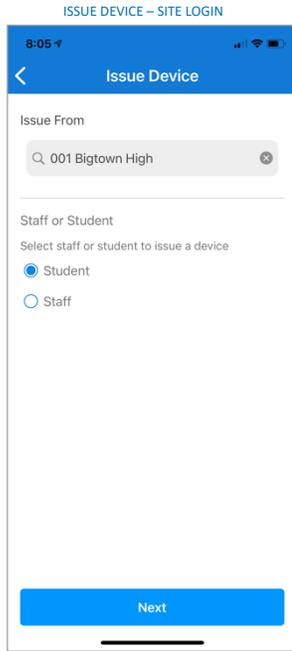
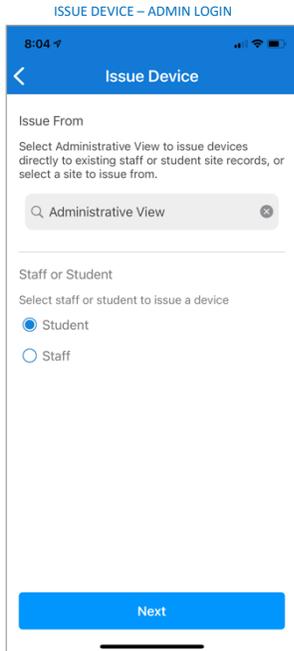
#### ADMIN VIEW VS SITE VIEW

Just as in TIPWeb-IT, admin users can issue from any site to any site. To replicate the same experience in web, an administrative view is presented for the admin role. All sites from a district are presented from the dropdown, with the first option to appear in the list is *Administrative View*. Selecting to issue as *Administrative View* allows the admin to select existing user records (staff or student) and issue to the user record.

The difference between the two views is small, but important. Because duplicate user records can exist in TIPWeb-IT, selecting *Administrative View* allows the issuer to select from existing user records to issue to. Selecting a *site* allows the issuer to add a user record to the selected site upon issuance (if user role restrictions are not enabled).

#### SITE

A list of available sites for the issuer automatically appears. As you type into the **Site** field, the list of sites will filter down accordingly. You must select a site from the list to properly load the selection into the field.



#### STUDENT OR STAFF

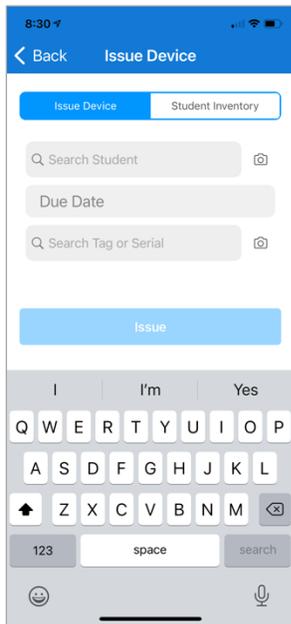
Upon selecting a site, select which type of user you would like to issue to, **Student** or **Staff**. Student is selected by default. Once both a valid site and user type have been selected, the **Next** button at the bottom of this screen is enabled.

NOTE – for customers with warehouse functionality enabled, you cannot select Student to issue to from a warehouse-type site.

These settings will persist to the next screen for each collection.

Select Next to proceed to Step 2

## STEP 2 – Select staff/student, due date, and enter tag/serial.



#### STAFF/STUDENT

Search for staff or student by ID or name (character string) either by typing in via keyboard or by scanning a staff/student badge either via barcode scanner or device camera.

#### DUE DATE

Select a due date for the issuance (optional). Selecting a date adds a due date back to the distribution record. Once a date is selected, it can be changed or cleared by selecting the calendar icon.

#### TAG/SERIAL

Search for tag or serial either by typing in via keyboard or scanning a tag via barcode reader or device camera.

#### INPUT METHODS

##### Barcode Scanner

Scan a badge or barcode code to load the ID or tag number.

##### Device Camera

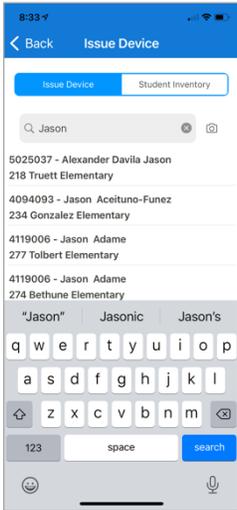
Select the camera icon to enable the device camera. Hold the camera at a distance to allow it to focus on the badge or barcode.

##### Keyboard

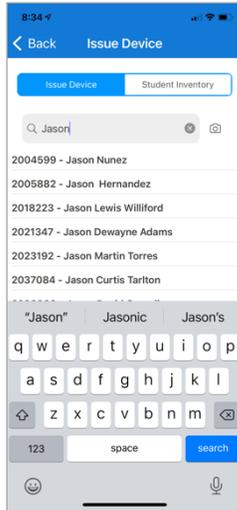
Start typing a staff/student ID, name, or tag/serial and a list matching returns will appear as you type. The list will filter down as you continue to type more characters. A minimum of 4 characters are necessary to produce a list of matching returns. You must select a staff/student or tag/serial from the list to properly load the selection into the field.

**\*Issuing tags via RFID scanner is not supported at this time**

STAFF/STUDENT SEARCH – ADMIN



STAFF/STUDENT SEARCH – SITE



STAFF/STUDENT SEARCH RETURNS – ADMINISTRATIVE VS SITE

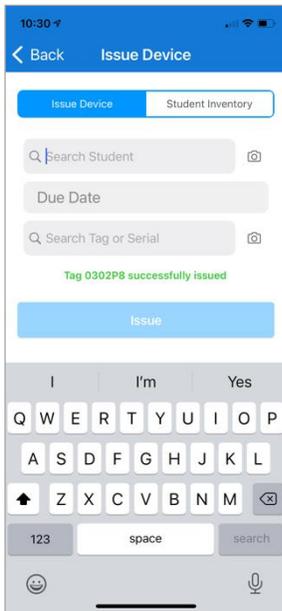
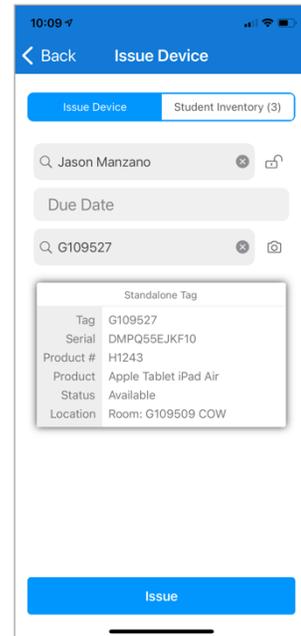
NOTE: When searching for staff or student from Administrative View, the list of available user records will include the site, because multiple user records can exist from multiple sites. From the Site View only the site records present at that site are presented.

TAG CARDS

Upon entering in a valid tag/serial, you will see a card that displays the following:

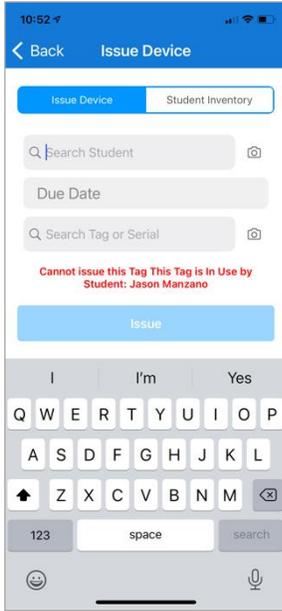
- Tag number
- Serial number (if present)
- Product number
- Product
- Location (room, staff, or student)
- Accessories count (if present)

When you have entered a valid tag/serial, the **Issue** button is enabled. Select **Issue** to issue the tag.



SUCCESSFUL ISSUANCE

When an asset is successfully issued, a success message appears on screen. The **Issue** button is disabled until another staff/student and valid tag/serial entered is ready to be issued.



#### UNSUCCESSFUL ISSUANCE

If an asset cannot be issued, an error message appears indicating why the asset cannot be issued. For example, if the asset already is already in use.

#### OTHER TYPES OF SCENARIOS WHEN A TAG CANNOT BE ISSUED

- Tag/serial is not within the system.
- Site Admin/User cannot issue a tag from another site when “Restrict from Initiating and Receiving Tags when Issuing to Staff/Students” is enabled.
- Site Admin/User cannot issue a device to a student from another site when “Restrict from Adding Student from Other Sites” is enabled.
- Tag is on a transfer.
- Tag has been archived.
- Tag is not available.
- When attempting to issue parent tag to another site and parent funding source is restricted.
- When attempting to issue parent tag to another site and component funding source is restricted.
- When attempting to issue standalone tag to another site and funding source is restricted it cannot be issued.
- Tag is not in user’s department it cannot be issued.
- When attempting to issue parent tag and components do not belong to user’s department.
- Tag is already assigned to staff from a different site.
- Tag is in a container from a warehouse site.
- When attempting to issue a tag to staff/student ID that is inactive.

#### TYPES OF TAG CARDS

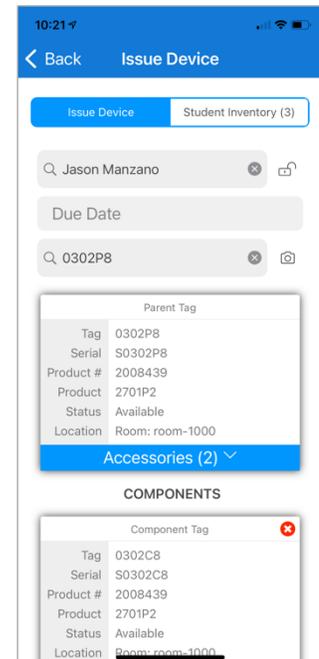
In TIPWeb-IT, there are 3 types of tags:

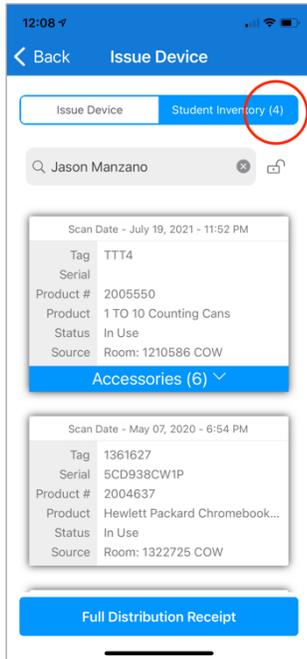
1. Standalone
2. Parent
3. Component

The card will display what type of asset you have entered. Standalone assets do not have any component assets. Parent assets have one or more components. Component assets have a single parent asset.

#### ACCESSORIES

If an asset (standalone, parent, or component) has accessories, a blue bar at the bottom of the card with downward arrow indicates there are accessories associated with the asset (and the number of accessories). Read more details below regarding accessories.



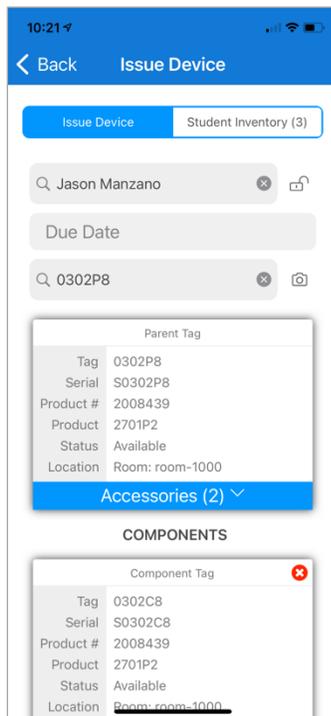


#### USER INVENTORY

To view what inventory a selected user is currently issued, select the User Inventory tab at the top of the screen. A list of current inventory is presented showing the tag and scan date for each item. The count of total inventory is reflected in tab control.

From this tab, you may send a Full Distribution receipt to the staff/student by selecting **Full Distribution Receipt** at the bottom of the screen. This will send the most up-to-date listing of all inventory currently held by the staff/student.

## ISSUANCE - ACCESSORIES, DECOUPLING COMPONENTS, USER FIELD LOCK



Standalone, parent, and component tags can each have associated accessories assigned to a respective product. You can issue these accessories as you would in TIPWeb-IT.

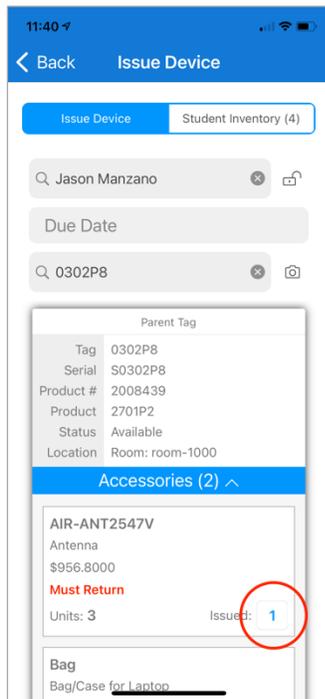
#### TAGS AND ACCESSORIES

If an asset (standalone, parent, or component) has accessories, a blue bar at the bottom of the card with downward arrow indicates there are accessories associated with the asset. Tap the arrow to reveal the associated accessories.

### ACCESSORY PROPERTIES

Revealing the accessories presents additional accessory cards that display the following:

- Accessory name
- Accessory description
- Accessory type (consumable vs must return)
- Number of units prescribed
- Number of units to issue



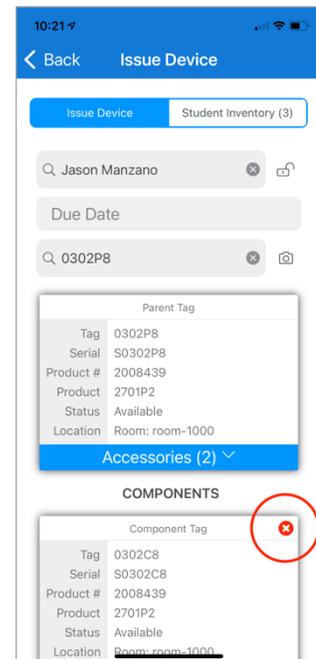
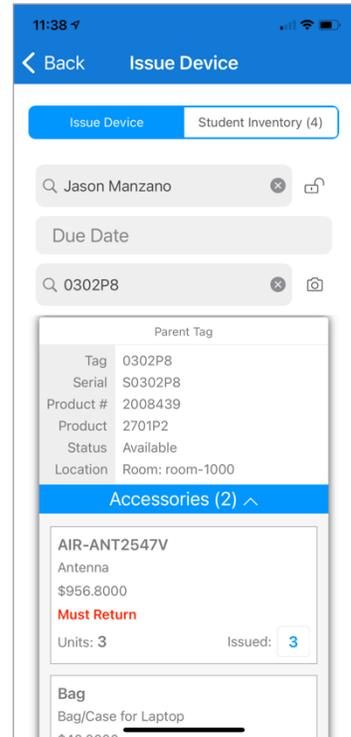
### ADJUSTING ACCESSORY COUNT TO ISSUE

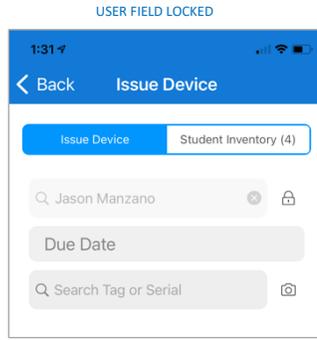
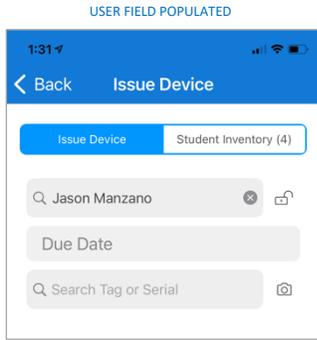
To issue an accessory count other than what has been prescribed by the product type (the amount to issue will prepopulate with the number prescribed), simply change the number to issue. NOTE – you may only issue a number equal to or less than the number of units prescribed.

### DECOUPLE A PARENT/COMPONENT TAG

When issuing a parent asset, you can remove the component asset from the parent independent of issuance. Once a component is decoupled from its parent, you cannot rejoin the component via the mobile app.

To remove the component from its parent, simply select the remove icon on the component card. You will not receive a confirmation before decoupling the component so ensure you are wanting to disconnect it from the parent.

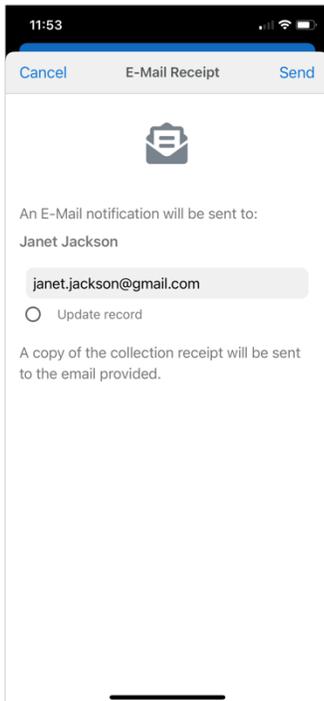




#### USER FIELD LOCK

When issuing multiple assets to a single individual, you may lock the user field so it persists for multiple issuances. Once a staff/student input is populated, the camera icon changes to an open lock icon. Locking the staff/student input field returns the focus to the tag/serial field after a successful issuance. Normal operation without a lock is to return the focus to the staff/student input after an issuance. A locked staff/student input field stays locked until the issuer unlocks the field. Clearing the staff/student selection removes the lock and the icon returns to the camera icon.

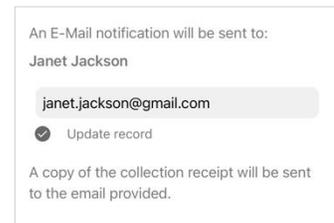
## ISSUANCE - SENDING DISTRIBUTION RECEIPTS

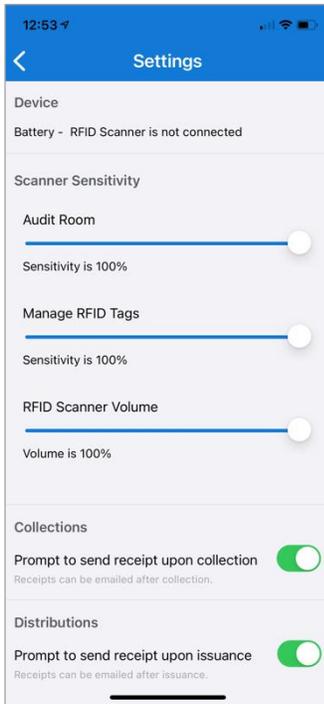


Upon issuing an asset, a window automatically appears allowing you to verify the existing email address or to add/change this email and send a receipt. You can select to turn off this modal under **Settings**.

If there is an email address associated with the student or staff record in TIPWeb-IT, this address will auto-populate in the fields provided. Student records may include a second email for a parent. Select **Send** to send a copy of the receipt or select **Cancel** to abort the email. Selecting **Cancel** does not stop the collection itself, only sending the receipt.

In addition, you can update the email address on file for the student or staff record in TIPWeb-IT by selecting "Update record." This will update TIPWeb-IT to reflect the address you have entered.



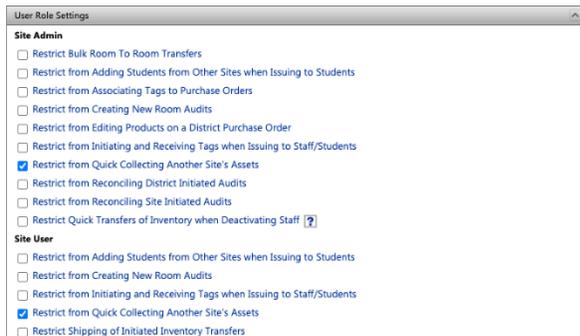


#### EMAIL RECEIPT PROMPT

During the issuance process, there might be times when you do not want to send receipts and turn off the receipt window to avoid extra clicks. If you do not wish to send an email for every tag you collect, you can select to turn off this window under **Settings**.

From Settings, under Collections, you can enable or disable the email receipt window from appearing upon each collection. This setting is on by default. You can choose to email the receipt after the collection under the **History** tab.

## COLLECTIONS - USER ROLE SETTINGS



The ability to Quick Collect is based on user role settings in TIPWeb-IT. The mobile app will inherit user role settings from the web app.

## COLLECTIONS - COLLECTING ASSETS

From the home screen, select **Collect Devices**.



Collecting devices (or tags) is a 2-step process:

- STEP 1 – set Site, Room, Status to collect to. Enter Status Notes as necessary
- STEP 2 – enter Tag or Serial number either by barcode scanner, device camera, or manually typing

STEP 1 – Select the site, room, and status to collect to. Enter status notes as necessary.

NOTE: the ability to collect an asset *to a site other than your own* is an Admin role permission. The **Site** field (the site to collect to) will always be present for Admin roles. For Site roles, the **Site** field will only appear if the Site Admin/User is assigned more than 1 site.

### SITE

A list of available sites will automatically appear. As you type into the **Site** field, the list of sites will filter down accordingly. You must select a site from the list in order to properly load the selection into the field.

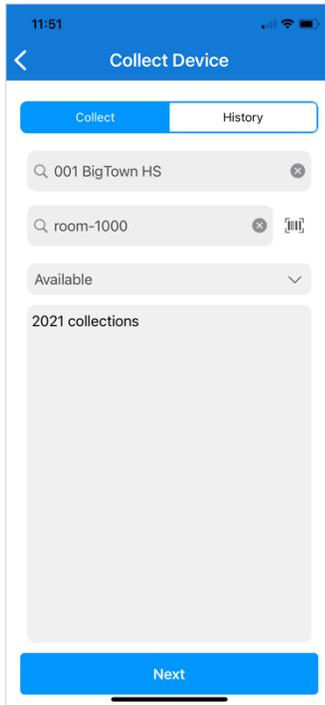
### ROOM

Upon selecting a site, a list of available rooms associated with the selected site will automatically appear. As you type into the **Room** field, the list of rooms will filter down accordingly. You must select a room from the list in order to properly load the selection into the field.

In addition to typing in the room number, if your district uses barcodes for labeling rooms, you can use a barcode scanner or the device camera to scan the room number. Using a barcode scanner, simply scan the barcode to populate this field. Using a device camera, select the icon to bring up the camera window. Scanning the room will auto-populate the Room field if it is a valid room.

Once both a valid site and room have been selected, the **Next** button at the bottom of this screen is enabled.

These settings will persist to the next screen for each collection.



#### STATUS

The default status to collect is the status of Available. You can collect an asset from any status, but only collect to the following statuses for this release (version 1.9):

- Available
- Disposed
- In Repair
- In Use
- Recycled
- Returned to Vendor
- Surplus
- Used for Parts

The following statuses will not be available to collect to for this release (version 1.9):

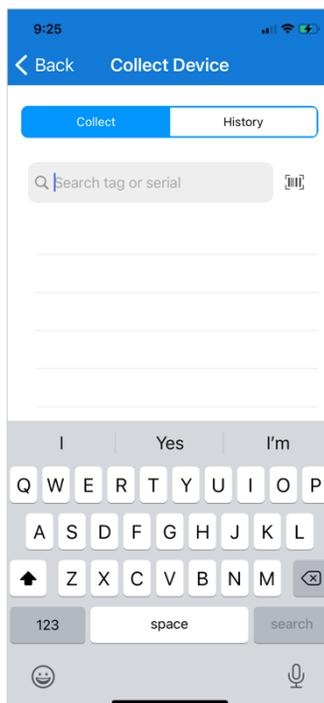
- Auctioned
- Lost
- Sold
- Stolen

#### STATUS NOTES

Enter status notes for the transaction record as necessary. This field is not required you can continue onto the second screen without entering in any notes.

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## STEP 2 – Enter a tag or serial number

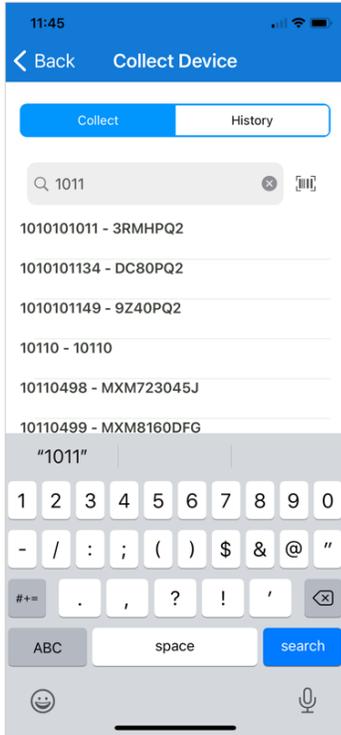


#### BARCODE SCANNER

Simply scan the code to load the tag or serial number.

#### DEVICE CAMERA

Select the scan icon to bring up the camera window. Hold your camera at a distance your device camera can accurately focus on the barcode.



#### KEYBOARD

Start typing into the tag/serial field and a list matching tags or serials will appear as you type. The list will filter down as you continue to type more characters. A minimum of 4 characters are necessary to produce a list of matching returns.

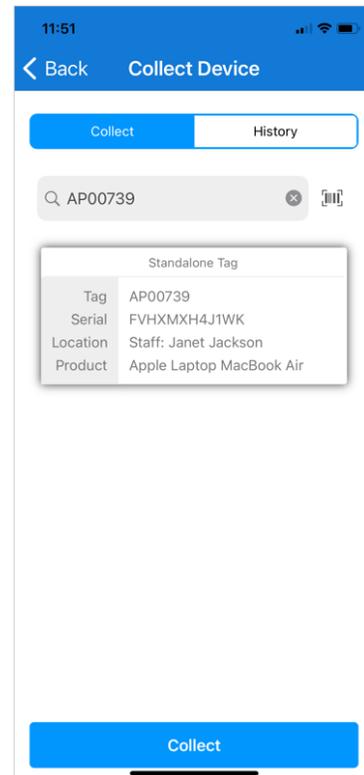
**\*Collecting tags via RFID scanner is not supported at this time.**

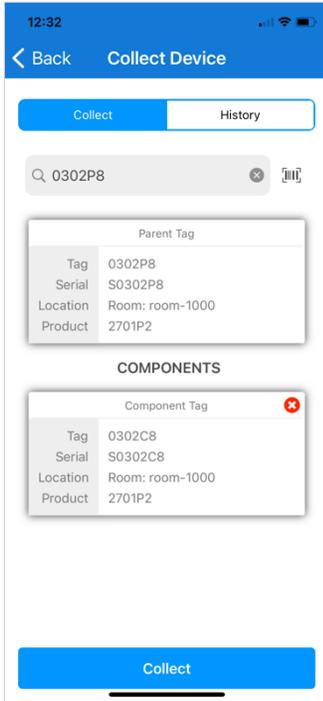
#### TAG CARDS

Upon entering in a valid tag/serial, you will see a card that displays the following:

- Tag number
- Serial number (if present)
- Location (room, staff, or student)
- Product
- Accessories count (if present)

When you have entered a valid tag/serial, the Collect button at the bottom of the screen is enabled.





#### TYPES OF ASSETS

In TIPWeb-IT, there are 3 types of assets:

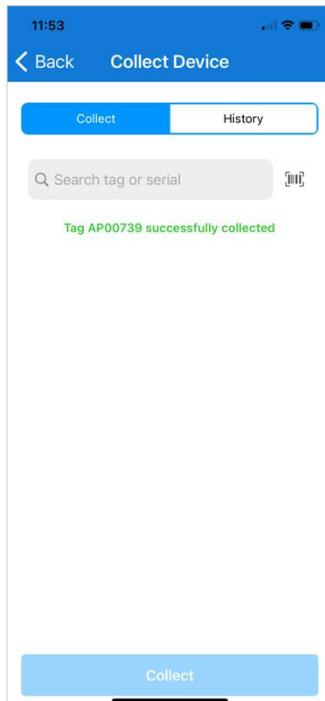
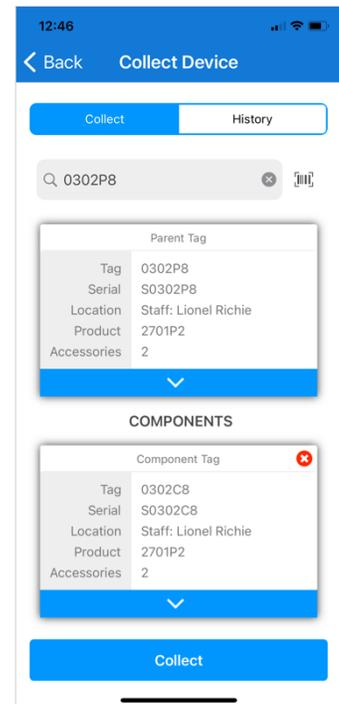
4. Standalone
5. Parent
6. Component

The card will display what type of asset you have entered. Standalone assets do not have any component assets. Parent assets have one or more components. Component assets have a single parent asset.

#### ACCESSORIES

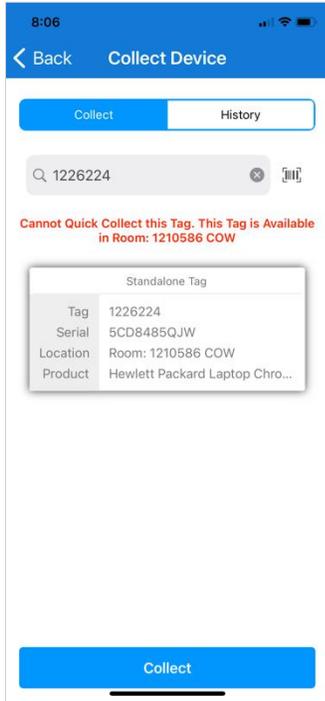
If an asset (standalone, parent, or component) has accessories, a blue bar at the bottom of the card with downward arrow indicates there are accessories associated with the asset. Read more on accessories below.

To collect an asset, select **Collect** at the bottom of this screen.



#### SUCCESSFUL COLLECTION

When the asset is successfully collected, a success message will appear on screen. The Collect button is disabled until another valid tag/serial entered is ready to be collected.



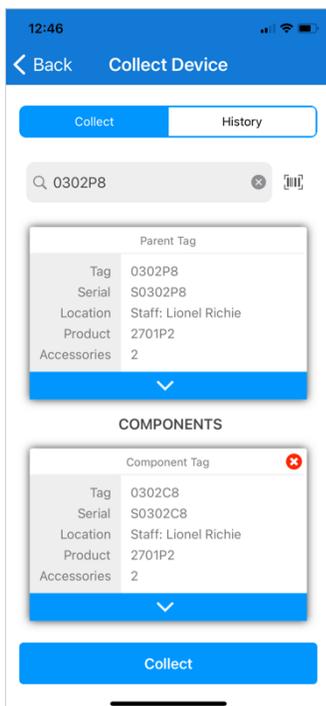
#### UNSUCCESSFUL COLLECTION

If an asset cannot be collected, an error message appears above the tag card indicating why the asset cannot be collected. For example, if the asset already is collected into a room or if the tag does not belong to your site (specific to Site Admins/Users, read more below).

#### SPECIAL CASES WITH USER ROLE SETTINGS

When the User Role setting "Restrict from Quick Collecting Another Site's Assets" under District Settings is set ON, a Site Admin or User cannot collect an asset from another site to their own. However, when a Site Admin/User is assigned multiple sites, this setting will still behave as it does in TIPWeb-IT allowing a Site Admin/User to collect an asset from an assigned site to the same site.

## COLLECTIONS - ACCESSORIES

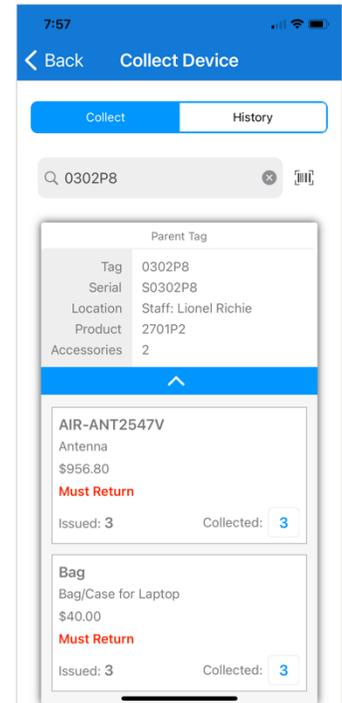
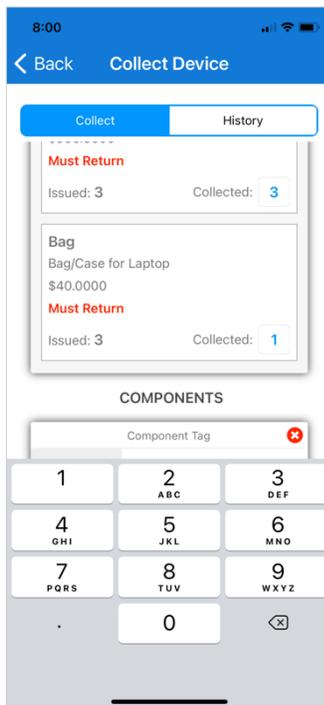


Standalone, parent, and component tags can each have associated accessories assigned to a respective product. You can collect these accessories as you would in TIPWeb-IT.

If an asset (standalone, parent, or component) has accessories, a blue bar at the bottom of the card with downward arrow indicates there are accessories associated with the asset. Tap the arrow to reveal the associated accessories.

Revealing the accessories presents additional accessory cards that display the following:

- Accessory name
- Accessory description
- Accessory type (consumable vs must return)
- Number issued
- Number collected

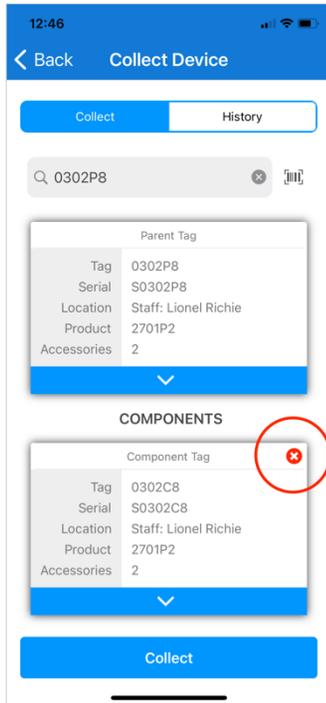


#### COLLECTED ACCESSORIES

To collect an accessory count other than what has been issued (the amount to collect will prepopulate with the number issued), simply change the number to collect. NOTE – you may only collect a number equal to or less than issued.

Accessories that are assigned with a missing charge will automatically create charges if the accessory is collected as “missing” or the number of accessories is less than issued.

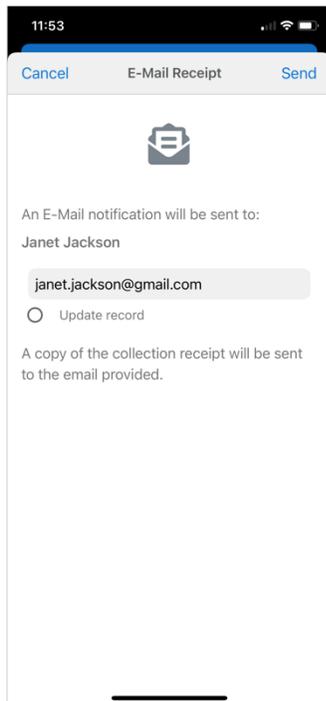
## COLLECTIONS - DECOUPLING COMPONENTS FROM PARENTS



When collecting a parent asset, you can remove the component asset from the parent independent of collection. Once a component is decoupled from its parent, you cannot rejoin the component via the mobile app.

To remove the component from its parent, simply select the remove icon on the component card. You will not receive a confirmation before decoupling the component so ensure you are wanting to disconnect it from the parent.

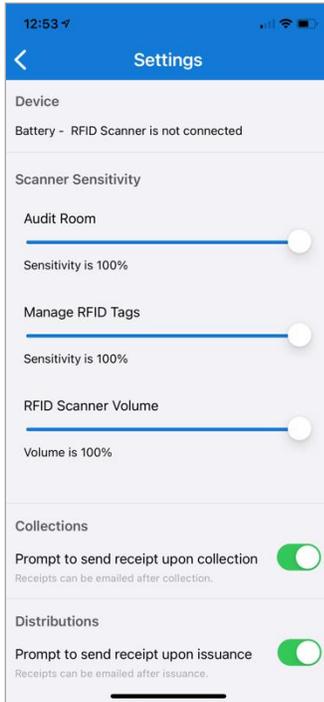
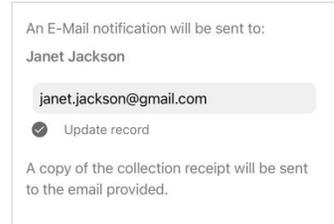
## COLLECTIONS - SENDING COLLECTION RECEIPTS



Upon collecting an asset, a window automatically appears allowing you to verify the existing email address or to add/change this email and send a receipt. You can select to turn off this modal under **Settings** (more below).

If there is an email address associated with the student or staff record in TIPWeb-IT, this address will auto-populate in the fields provided. Student records may include a second email for a parent. Select **Send** to send a copy of the receipt or select **Cancel** to abort the email. Selecting **Cancel** does not stop the collection itself, only sending the receipt.

In addition, you can update the email address on file for the student or staff record in TIPWeb-IT by selecting "Update record." This will update TIPWeb-IT to reflect the address you have entered.



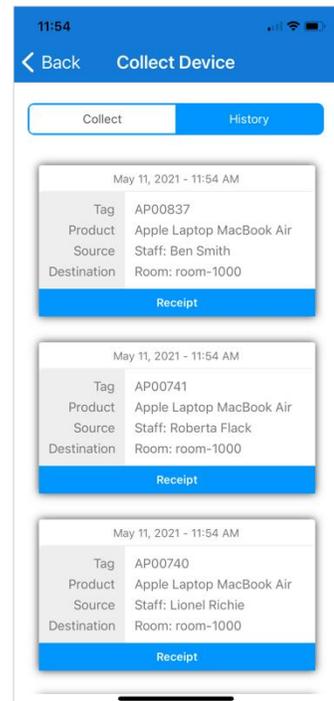
#### EMAIL RECEIPT PROMPT

During the collection process, there might be times when you do not want to send receipts and therefore turn off the receipt window to avoid extra clicks and save some time. If you do not wish to send an email for every tag you collect, you can select to turn off this window under **Settings**.

From Settings, under Collections, you can enable or disable the email receipt window from appearing upon each collection. This setting is on by default. You can choose to email the receipt after the collection under the **History** tab.

#### HISTORY TAB AND SENDING RECEIPTS AFTER COLLECTION

From the Collect Devices screen, you can view the collection transactions via the **History** tab. This tab will store each collection transaction for up to 48 hours. Select a transaction card from the History tab to send (or resend) a copy of the email. The same email address window appears from the collection and you may choose to update the email address for the student or staff records accordingly.



## SYSTEM REQUIREMENTS AND DEVICES

### APPLE

- iOS 13 and 14 for iPhone
- iPadOS 13 and 14 for iPad

### ANDROID

- 9, 10, 11 for various devices